



Chartered Institute
of Personnel and
Development

Coaching and buying coaching services

a guide

Coaching and buying coaching services

– a CIPD guide

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Introduction

Few people can fail to have noticed the explosive growth in coaching in recent years. The 2004 CIPD training and development survey shows that four-fifths of respondents now use coaching in their organisations. As a tool that can help businesses to be competitive, as well as help people attain their potential, coaching seems to offer a win-win solution for all. But there is also concern about a number of 'cowboy' coaches entering the market who are inexperienced, have little training and lack the appropriate knowledge and skills. Part of the problem lies in the fact that the coaching industry is highly fragmented, with no single professional body or sets of standards and qualifications to guide buyers of coaching services.

Understandably, this situation leaves many HR practitioners wary and sceptical. How do you sort out the wheat from the chaff? How can you be sure you are choosing the right type of coach? What can you do to manage coaching relationships to make them successful? Making sense of the evolving coaching world, ensuring you are getting value for money and managing coaching relationships to gain a high-quality service are all real challenges for businesses today.

The HR department has a key role to play in selecting and managing coaching relationships within an organisation. The quality of coaching and the results it delivers depend hugely on choosing appropriate coaches, managing relationships and evaluating success. HR practitioners need to understand when coaching is an appropriate and effective intervention in relation to other learning and development options. They need to be clear about what the different types of coaching and diagnostic tools/models are, and when each is appropriate. They need to determine when in-house or external coaches are most suitable. They need to understand how to select appropriately qualified coaches and then match them to both the organisational culture and to the needs of particular individuals. Finally, HR practitioners hold the responsibility for setting up contractual arrangements, as well as developing mechanisms to evaluate the effectiveness of the coaching activities. None of these activities are easy – particularly when the coaching industry has yet to develop agreed sets of standards, ethics and/or qualifications to help HR practitioners make good decisions.

A significant number of CIPD members are now engaged in coaching activities, albeit in a variety of different ways. Because of the widespread use of coaching and the confusion that seems to enshroud it, it seems timely and important that the CIPD offers members advice and guidance on how to successfully design and manage their coaching activities for the benefit of their staff and the organisation as a whole. This Guide seeks to address one particular aspect of this – buying in, and managing, the services of external coaches. In this way, it is an HR buyer's guide to coaching that aims to help HR practitioners navigate the complex coaching marketplace, by demystifying many of the concepts and terminology in use and providing clear advice and guidance on some of the processes. We hope that the Guide will help build the knowledge and confidence of HR practitioners by helping them become more knowledgeable advisers on coaching for their

organisation. This Guide will be useful reading for practitioners considering using coaching, organisations actively using coaching but with little HR involvement, and where HR practitioners are keen to better manage their coaches. The Guide should also be of interest to coaches themselves, so that they can understand the organisational perspective and the approach HR professionals may adopt when they are looking for external coaching support.

This Guide:

- provides an overview of the coaching industry
- outlines the different professional bodies and the current training and qualification options
- explains the different types of coaching
- discusses the business case for coaching
- considers when coaching is an appropriate intervention
- discusses the different interest groups in coaching (HR, line managers, the individual etc)
- explains when the use of internal or external coaches may be appropriate
- provides guidance on what to look for in a coach during selection
- provides guidance and advice for HR on recruiting and matching coaches to your organisation.

We hope that you will find the Guide helpful, and that it offers practical advice about how to gain full value from your use of external coaching services. By exerting pressure in terms of minimum expected standards, qualifications and outcomes, the CIPD aims to help its members 'raise the bar' in terms of standards and professionalism across the industry and ensure the potential benefits of coaching interventions are realised.

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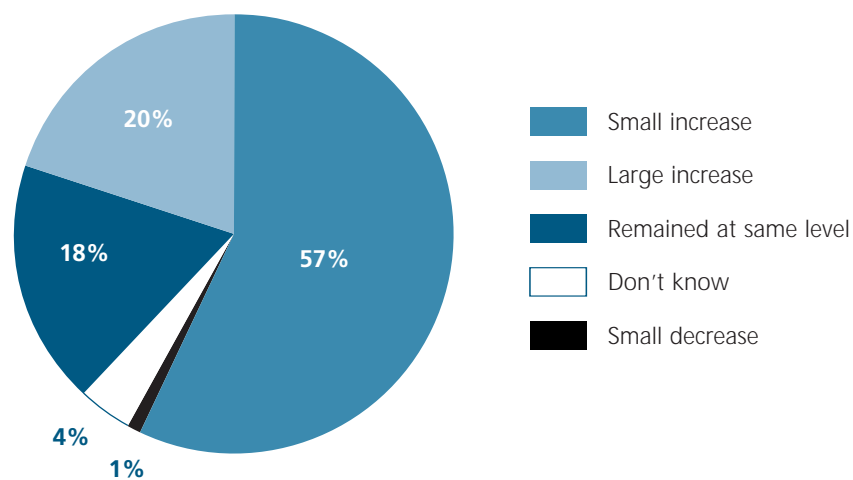
Part 1 Coaching – the current position

Coaching is a hot topic in the HR and training community. However, a number of questions remain unanswered. What exactly is it? How effective it is? Is it just a fad? How can its impact best be evaluated? What are organisations using it for? The CIPD 2004 training and development survey responded to these questions by dedicating an extensive part of the questionnaire to this topic. In this section, we provide a picture of how coaching is being used in UK organisations and offer a general overview of the coaching industry. It should be noted at this stage that coaching is a growing and emerging area of HR practice, which is continually evolving. The survey evidence therefore only provides us with a ‘snapshot’ of current coaching activities.

How widely is coaching being used?

The survey results highlight the widespread use of coaching in organisations. Almost four-fifths of respondents now use coaching in their organisation (79%). Use of coaching as a development tool has seen rapid growth in recent years – in fact 77% of respondents reported that their organisation’s use of coaching has increased in the last few years. Only 1% of respondents reported that coaching activities had decreased (Figure 1).

Figure 1: Changes in levels of usage of coaching in the last few years



What is responsible for this rapid growth in use? Are we simply seeing the emergence of the latest HR trend, or are organisations recognising that coaching activities produce major benefits for them and the ‘good message’ is spreading into mainstream organisational practice?

What are the drivers of the rise in the popularity of coaching?

A number of factors have been at play in making coaching such a popular intervention in organisations today (Figure 2). These include:

- **A rapidly evolving business environment.** The fast pace of business alongside significant time pressures mean that dealing with change is becoming an everyday challenge. The ability to learn and adapt is quickly becoming an essential skill. Targeted development interventions such as coaching have become popular in helping individuals adjust to major changes in the workplace.
- **The features of modern organisations.** Flatter organisational structures, broader management roles and lower job security have also been contributing factors to the growth of coaching. Organisational downsizing and the resulting flatter structures mean that newly promoted individuals often have to make large step-changes in skills, responsibilities and performance because of the higher and broader requirements of their new roles. Coaching can support these individuals in achieving these changes.
- **Lifelong learning.** The importance of learning throughout a person's life is increasingly being recognised. This has paralleled the growing need for organisations and individuals to change and keep changing in order to keep up with a fast-paced, turbulent world market. Coaching has the adaptability to support different learning styles so may be able to support more employees than traditional training methods.
- **The need for targeted, individualised, just-in-time development.** The development needs of individuals can be diverse and in smaller organisations there are often too few individuals with specific development needs to warrant the design of a formal training programme. This often means that the traditional 'one size fits all' training programme that takes place every few months is inappropriate. Coaching offers a flexible, responsive approach to development, which can be delivered individually, and 'just-in-time' to address deficiencies in current performance or to strengthen under-developed skills.
- **The financial costs of the poor performance of senior managers/executives.** There is a growing acceptance of the costs associated with poorly performing senior managers/executives. Coaching provides organisations with an opportunity to undertake pre-emptive and proactive interventions to improve their performance (Greco 2001; Kilburg 1996).
- **Improving the decision-making of senior employees.** For senior level employees it can be 'lonely at the top' as they have few people they can confide in, develop ideas and discuss decisions. A coach can be used to provide a 'safe and objective haven' to discuss issues and give support (Masciarelli 1999). This can be valuable when the return on improvement in skill level and decision-making is considered.
- **Individual responsibility for development.** There is an increasing trend for individuals to take greater responsibility for their personal and professional development (see CIPD 2003). With the decline of 'jobs for life', employees can no longer rely on employers to provide them with all of their career development needs. If individuals are to take responsibility, they need support and advice. Coaching can help individuals identify development needs, plan development activities and support personal problem-solving.

- **Employee demand for different types of training.** The CIPD's Survey Report, *Who Learns at Work?*, showed that learning at work, as opposed to in the training room, is increasingly popular. Research has also frequently demonstrated that people are more motivated and learn best when they see that the training is relevant to their job. Coaching, with its focus on work issues and improving job performance, fits in well with this.
- **Support for other learning and development activities.** Much money spent on training activities is wasted if the personal development momentum is allowed to dissipate after the event. Coaching is a valuable way of providing ongoing support for personal development plans.
- **A popular development mechanism.** People enjoy participating in coaching. It has many features that make it attractive to those taking part. Participants get direct one-to-one assistance and attention; it can fit in with their own timeframes and schedules; and there is the potential to see quick results if they are dedicated.

Figure 2: Drivers of the rise in the popularity of coaching



These are just some of the characteristics of the modern organisation and contemporary working lives that have led to the burgeoning popularity of coaching. There is also little doubt that the increased demand for coaching has been partly fuelled by the popular press. However, along with the increase in demand have come concerns about how to ensure the effective use of coaching and how to navigate the complex coaching industry.

Here to stay, or just a fad?

Despite the widespread use of coaching as a development tool, doubts remain about whether or not it is simply the latest in a long line of HR and training fads. The reputation of coaching has been slurred by descriptions like 'paid friendships', 'a sounding board', 'the latest executive accessory' and 'pinstripe counselling', to name but a few. But many commentators argue that, although the term 'coaching' is relatively new, the idea of one-to-one consultation on development needs has been around for decades. Activities such as personal effectiveness programmes and 360-degree feedback initiatives have all focused on making employees (most frequently managers and executives) more aware of their personal style and areas they need to develop. Where these previous interventions were limited was in providing the means for participants to actually make lasting changes. It seems that 'knowing what you need to change' is only one piece of the jigsaw – it's not enough to bring about actual changes in a person's style or work habits. This is where coaching fits in, because of its change orientation and support for ongoing development.

As the coaching market matures, coaching has begun to look like more than a passing fashion. Lane and Rajan (CIPD 2000) reported that coaching is a 'growing trend' rather than a fad, based on their research with 900 companies. They believe it is part of the new performance-led culture of employment rather than the traditional employment model of job security. Janice Caplan (author of the 2003 CIPD book, *Coaching for the Future*) contends: 'I believe the reason for the massive increase in the use of coaching is that it is a process and a solution that suits our times. It is an effective mechanism for enabling an organisation to meet competitive pressures, plan for succession and bring about change.' This seems to be reflected in views of the HR/training community (see Table 1).

Table 1: Views on the benefits of coaching (CIPD 2004)

	% of respondents who agree
Coaching can deliver tangible benefits to both individuals and organisations	99
Coaching is an effective way to promote learning in organisations	96
Coaching and mentoring are key mechanisms for transferring learning from training courses back to the workplace	93
When coaching is managed effectively it can have a positive impact on an organisation's bottom line	92

As Table 1 illustrates, practitioners seem to believe coaching is an effective way of promoting learning, can have an impact on the organisation's bottom line and can deliver tangible benefits to individuals and organisations. Practitioners rarely report such positive findings.

Coaching activity in UK organisations – a current view

How is coaching being used?

We have seen that there are many interweaving factors that have led to the increased use of coaching, but what are organisations actually using coaching to achieve? The results of the 2004 CIPD training and development survey provide us with some answers to this question (Table 2).

Table 2: Objectives for organisations' coaching activities

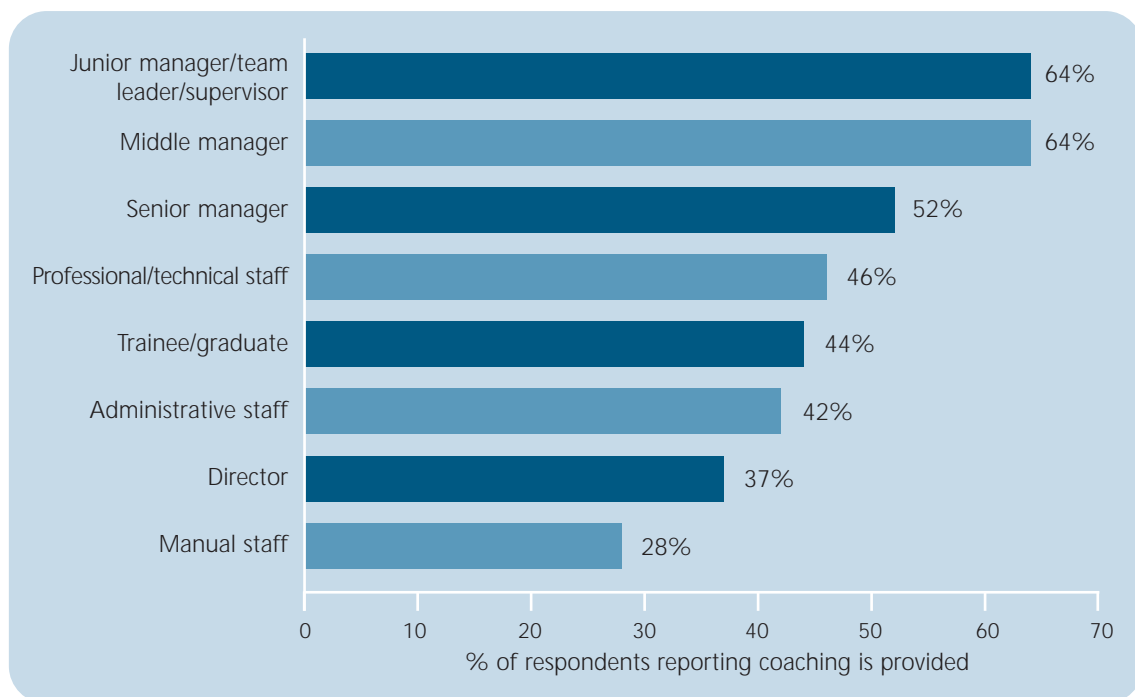
	% of respondents reporting this item as a main objective
Improving individual performance	78
Dealing with underperformance	30
Improving productivity	28
Career planning/personal development	27
Growing future senior staff	26
Fostering a culture of learning and development	24
Motivating staff	21
Accelerating change in organisation	16
Demonstrating the organisation's commitment to staff	16
Improving staff retention	10
Reducing cost of sending staff to external courses	9
Helping staff to achieving better work-life balance	5
Satisfying demand for coaching from employees	2

Over three-quarters of respondents to the survey use coaching to improve individual performance, with the second and third most common reasons being related to the first – to tackle underperformance and to improve productivity. Beyond these three reasons, coaching tends to be used for a variety of training and staffing reasons. It seems as if the main drivers of coaching activities are performance-related rather than being used to address 'softer' issues like improving work-life balance or increasing motivation. Contrary to the 'touchy-feeley' image of coaching that is sometimes portrayed by the media, organisations actually seem to be using coaching to address significant business issues such as driving performance improvements and productivity.

Who is receiving and delivering coaching in organisations?

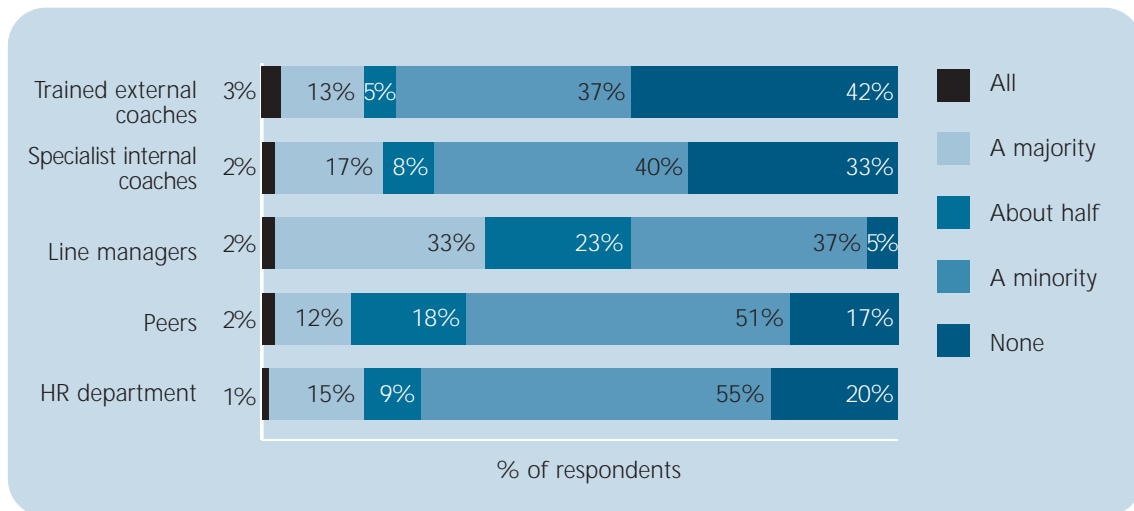
The popular press frequently portray coaching as an expensive, luxury product undertaken by external professionals and mostly aimed at executives or very senior managers. But a different picture emerged from the 2004 training and development survey data (Figure 3).

Figure 3: Who is receiving coaching?



The most common recipients of coaching are in fact junior and middle managers. A significant proportion of respondents reported that their senior managers and directors did receive coaching, but coaching appears to be being used for the development of staff at many levels of the organisation – not just senior executives, as the media may lead us all to believe.

Coaching can be delivered by trained external coaches, specialist internal coaches, line managers, peers, members of the HR department, and others. The survey revealed that most organisations are using a mixture of these groups to deliver their coaching activities (Figure 4).

Figure 4: Who is delivering coaching?

Line managers are most likely to deliver coaching, with a third of respondents reporting that this group delivers 'a majority' of coaching, and a further quarter saying that line managers are responsible for delivering 'half' of the coaching activities. Only 5% of respondents say that line managers deliver no coaching at all. Conversely, over 40% of respondents never use external coaches for their activities and those who do use them tend to use them only for a minority of the coaching that takes place.

Coaching therefore tends to involve a variety of internal and external practitioners, partly depending on the seniority of the individual and the specific needs of different employee groups. External coaches, when used, tend to be used for a minority of coaching activities in an organisation. This possibly reflects the cost of using them and may mean that their use is generally reserved for senior-level or high-potential employees.

The UK coaching industry

An article in the *Harvard Business Review* in June 2002 (Berglas 2002) suggested that there were at least 10,000 professional coaches working for businesses in the US, and this figure was expected to exceed 50,000 by 2007. Although it is hard to determine how many coaches are working in the UK, many commentators expect a similar picture to emerge over the next five years.

Coaching services are being delivered by a diverse group of individuals and organisations. Some coaches are self-employed or operate within small firms. Additionally, there are coaching consulting firms for whom

coaching is a major part of their practice, while large HR, management, outplacement and recruitment consultancies are adding coaching services to their portfolios, aiming to secure large multinational contracts. Many of these recruit people with track records in business and train them as coaches in-house. Other firms operate within a business psychology model of coaching where their coaches are qualified occupational, counselling or clinical psychologists, or come from the relatively new field of coaching psychology. Other backgrounds include performance coaches from the sporting world, and practitioners from a range of other therapeutic backgrounds (counselling, psychology, psychotherapy). Naturally, these different 'types' of coaches all bring with them very different skills. And this is where opinion begins to diverge on which skills, qualities and experience coaches should have.

Quality too can be hugely variable and this is where the buyers of coaching services – often HR – can face difficulties. There is a growing number of business advisers and consultants who have reinvented themselves as coaches and, without any further training, now operate as full-time coaches. Problems can arise when these people delve into issues that they have little understanding of, and are not trained to deal with. While demand grows steadily, many companies are now realising that a more discriminating approach is needed to sort the higher-quality coaches from the rest.

The concerns of HR buyers

The CIPD training and development survey provides insights into the concerns of HR buyers (Table 3). They reported that the lack of accreditation and regulation is 'worrying', that finding high-quality coaches is 'a difficult task' and that the terminology can be confusing and off-putting. No surprise then that there's an increasing demand from clients for an authoritative and objective source of information on the quality, rigour and credibility of all these different offerings.

Table 3: Concerns of HR buyers of coaching services

	% of respondents	
	Agree	Don't know
There is a great deal of confusion around what is meant by the term 'coaching'	81	3
I clearly understand the difference between all the different types of coaching on offer	50	14
Finding and selecting high-quality external coaches is a difficult task	49	29
The lack of regulation and accreditation in the coaching industry is very worrying	40	27

An array of professional bodies

Mirroring the fragmentation that exists in the industry generally, there are many professional bodies and associations. There is a plethora of codes of practice, ethics, guidelines and standards of practice. And as well as the CIPD, four key bodies have now emerged at the forefront of the industry:

- the Association for Coaching (AC)
- the Coaching Psychology Forum (CPF)
- the European Mentoring and Coaching Council (EMCC)
- the International Coach Federation (ICF).

A table comparing these professional bodies and providing an overview of what becoming a member entails is shown in the appendix.

All these organisations are involved in a number of initiatives (some in co-operation with others) to improve coaching standards, practices and services. They represent many of the professional coaches who are pushing from the supply side for higher standards and quality.

However, even between the four coaching bodies there is still a degree of rivalry and vying for status and position. Many commentators think that, as the coaching industry matures, consolidation of these bodies will occur. Many CIPD training and development survey respondents felt that 'a single professional body' in the coaching industry would be useful. But other views exist. Gladeana McMahon, Senior Coaching Consultant at Penna Consulting, comments: 'It is possible that in the future only one coaching body will exist. However, coaching is such a broad field that one body may not be able to fulfil the needs of such a diverse group and we may find that as in accountancy and other such fields, there will be a number of bodies representing differing aspects of the industry.'

Views of the HR community

The 2004 training and development survey results provide some insights into the views of HR practitioners about the array of professional bodies. Of our respondents, 40% agreed that 'the lack of regulation and accreditation in the coaching industry is very worrying', but 27% said they 'don't know'.

Forty five per cent of respondents thought that it would be useful if there was a single professional body for coaches in the UK. A further 37% opted for the 'don't know' option, but only 18% thought that it would not be useful. Those who thought there should be a single professional body were asked what they felt the role of this body should be. The results are shown in Table 4 overleaf.

Table 4: Possible roles of a single coaching professional body

Possible roles	% that indicate the role
Providing information and advice	84
Providing training courses and qualifications	82
Providing a code of ethics and standards that all coaches must adhere to	80
Accrediting courses and qualifications	78
Providing research/information/publications on coaching	70
Monitoring the continuing professional development of coaches	67
Providing a register of approved coaches	67
Dealing with any complaints about member coaches	37

Coach training and qualifications

Coaching courses and qualifications vary hugely, from short introductory courses to doctorate-level coaching qualifications. Between these extremes, there are certificate or diploma programmes such as those run by the CIPD, modules of business programmes, masters' programmes and coach training for professionals (eg HR/managers). There are also programmes offered by specialist training providers. Some example of courses are shown in Table 5.

In the past, the reputation of the coaching industry has been weakened by training providers who claim to produce professional coaches from five-day training courses. Coach training needs to be 'fit for purpose'. While there is definitely a place for short introductory courses, as with any discipline, expertise will vary depending on the length of the course, level of qualification, depth of study, practical experience and extent of supervision while studying.

The drive towards professionalism

The drive for greater professionalism is now coming both from suppliers and buyers of coaching. On the demand side, organisations are trying to be far more discerning about their use of coaching services. Evidence of the effectiveness of coaching interventions is being sought and more questions asked about spending and returns. From the supply side, quality coaches are keen to raise the reputation of the coaching industry and weed out practitioners who operate unethically.

This process is not new. Other professions such as counselling and psychotherapy have been through 'professionalisation' over the last decade or so. HR professionals have a key role to play in promoting this agenda. By exerting pressure regarding minimum expected standards, qualifications and outcomes, they can 'raise the bar' in terms of standards across the industry. Suppliers of coaching will have no option but to conform.

Table 5: Examples of coaching qualifications and providers in the UK

Level of coaching qualifications	Examples of institutions offering this level coaching the role
Doctorate-level coaching programmes	Middlesex University/International Centre for the Study of Coaching
Masters-level coaching programmes	Middlesex University/i-coach academy Oxford Brookes University Portsmouth Business School/Performance Consultants Sheffield Hallam University Wolverhampton University
Postgraduate diplomas and certificate-level programmes	CIPD/Oxford School of Coaching and Mentoring Academy of Executive Coaching i-coach academy City University Centre for Coaching Peter Bluckert Coaching/Leeds Metropolitan University
Shorter coaching programmes	Corporate Coach U UK College of Life Coaching AAA Coaching Partners Oxford Executive Coaching Penna Consulting Aspire 2

NB Contact information for all these institutions and others can be found in the 'Useful sources of information' section at the end of the Guide. A useful source of information on all of these options is the Coaching and Mentoring Network website www.coachingnetwork.org.uk

Looking to the future

The coaching industry is at a critical stage. The future success is likely to be determined by the quality and professionalism of coaches and their ability to deliver demonstrable value to their clients. If coaching is to become a true profession, further research into the effectiveness, business benefits and value of different coaching methodologies is crucial. Neil Offley, Programme Director at the NHS Leadership Centre, comments: 'We hope that evaluation and research will help show how coaching can deliver real benefits, and overcome a perception of it being the latest fad.'

As the coaching market continues to grow and mature, a number of trends are likely to appear. Jerry Arnott, Managing Director of Origin Consulting, states: 'I believe there will be a consolidation of coaching providers

and increased regulation and standardisation across the market. This is long overdue and there are already signs of this evolution as the coaching profession begins to address the fundamental issues of ethics, standards, accreditation and quality.' Peter Bluckert, Chair of the Standards and Ethics Group at the EMCC, predicts that opportunities for different types of coaches will continue to exist: 'Middle and upper market coaching consultancies who have the capacity to win larger contracts will continue to do well and highly regarded individual practitioners will always be in demand. New niche markets will open up not just in the UK but further afield and many top coaching firms will plan with international markets in mind.'

The coaching industry is still in its infancy. However, over the next few years it is likely that we will see greater professionalisation of coaching, organisations becoming more selective and a continuing increase in the supply and demand for coaching services. The CIPD will continue to monitor these trends with interest over the next few years.

Part 2 Defining and demystifying coaching

The term 'coaching' has come to refer to many different activities. Although this guide focuses on the use of coaching in organisational settings, it can be used in many other situations. Its early use in the business world often carried a remedial connotation – people were coached because they were underperforming or their behaviour was unsatisfactory. These days, coaching is more usually seen as a means of developing people within an organisation in order that they perform more effectively and reach their potential.

Confusion exists about what exactly coaching is, and how it is different from other 'helping behaviours' such as counselling and mentoring. A variety of niche types of coaching have also developed as the term has been popularised – life coaching, skills coaching, health coaching, executive coaching, to name but a few. In part, this may have arisen as a result of some practitioners taking advantage of a popular new term and applying it to their general services. Consequently, coaching has suffered from a degree of misperception and misrepresentation. To make things worse, people often use the terms interchangeably so that one person's life coaching is another's developmental mentoring. Many organisations use the terms to mean specific things in their own organisational contexts and others choose the terminology that seems most acceptable within their organisation. The result is that the same definitions are being applied to a variety of terms. These problems around terminology are illustrated in the 2004 training and development survey results, where 81% of respondents agreed that 'there is a great deal of confusion around what is meant by the term "coaching".'

There is lively debate about this topic by academics and practitioners alike, which has led to a certain fixation about the need for agreed definitions. While this debate rages, more and more terms emerge and there seem to be almost as many definitions of coaching as there are practitioners. The fact that Europe and the US interpret the words slightly differently adds further to the confusion. A selection of definitions of coaching are provided in Table 6, but these are merely a handful of those in use.

In this Guide, we simply try to illustrate and explain the key differences between some of the common terms that are currently being used. We will then concentrate on suggesting ways for practitioners to ensure they have secured a good understanding of what exactly coaches mean when they describe their services.

Table 6: Definitions of coaching

Definitions of coaching	Author
A process that enables learning and development to occur and thus performance to improve	Parsloe (1999)
Unlocking a person's potential to maximise their own performance	Whitmore (1996)
The overall purpose of coach-mentoring is to provide help and support for people in an increasingly competitive and pressurised world in order to help them: <ul style="list-style-type: none"> • develop their skills • improve their performance • maximise their potential • and to become the person they want to be 	CIPD coaching courses definition
Primarily a short-term intervention aimed at performance improvement or developing a particular competence	Clutterbuck (2003)
A conversation, or series of conversations, one person has with another	Starr (2003)
The art of facilitating the performance, learning and development of another	Downey (1999)
Defines the verb 'coach' – 'tutor, train, give hints to, prime with facts'	Concise Oxford Dictionary
A coach is a collaborative partner who works with the learner to help them achieve goals, solve problems, learn and develop	Caplan (2003)
Meant to be a practical, goal-focused form of personal, one-on-one learning for busy executives and may be used to improve performance or executive behaviour, enhance a career or prevent derailment, and work through organisational issues or change initiatives. Essentially, coaches provide executives with feedback they would normally never get about personal, performance, career and organisational issues	Hall et al (1999)
A collaborative, solution-focused, results-oriented and systematic process in which the coach facilitates the enhancement of work performance, life experience, self-directed learning and personal growth of the coach	Grant (2000)

Some generally agreed characteristics of coaching in organisations

Although there is a lack of agreement about precise definitions, there are some core characteristics of coaching activities that are generally agreed on by most coaching professionals:

- It consists of one-to-one developmental discussions.
- It provides people with feedback on both their strengths and weaknesses.
- It is aimed at specific issues/areas.
- It is a relatively short-term activity, except in executive coaching, which tends to have a longer timeframe.
- It is essentially a non-directive form of development.

- It focuses on improving performance and developing/enhancing individuals skills.
- It is used to address a wide range of issues (see 'How is coaching being used?' page 5).
- Coaching activities have both organisational and individual goals.
- It assumes that the individual is psychologically healthy and does not require a clinical intervention.
- It works on the premise that clients are self-aware, or can achieve self-awareness.
- It is time-bounded.
- It is a skilled activity.
- Personal issues may be discussed but the emphasis is on performance at work.

Broadly speaking, from the CIPD's perspective, coaching is developing a person's skills and knowledge so that their job performance improves, hopefully leading to the achievement of organisational objectives. It targets high performance and improvement at work, although it may also have an impact on an individual's private life. It usually lasts for a short period and focuses on specific skills and goals.

The 'helping behaviours' – differences between coaching, mentoring, counselling and consulting

Garvey (2004) suggests that activities such as coaching, mentoring and counselling can all be understood to be 'helping activities'. However, he agrees that understanding how they are different is difficult 'because of the sheer confusion over the terminology'. One way to tackle this is to make a brief comparison of the activities involved.

Coaching vs mentoring

There are many similarities between coaching and mentoring since both involve a one-to-one relationship that provides an opportunity for individuals to reflect, learn and develop. However, when comparing coaching with the traditional understanding of mentoring, there are some key differences.

The term 'mentoring' originates from Greek mythology. Odysseus entrusted his house and the education of his son to his friend, Mentor, saying to him, 'tell him all you know.' In practice, 'mentoring' has come to be used interchangeably with 'coaching'. David Clutterbuck (2001) comments, 'In spite of the variety of definitions of mentoring, all the experts appear to agree that it has its origins in the concept of apprenticeship, when an older, more experienced individual passed down his knowledge of how the task was done and how to operate in the commercial world.'

Some commonly agreed differences between coaching and mentoring (in its traditional sense) are shown in Table 7 overleaf.

Table 7: Differences between mentoring and coaching

Mentoring	Coaching
Ongoing relationship that can last for a long period of time	Relationship generally has a set duration
Can be more informal and meetings can take place as and when the mentee needs some advice, guidance or support	Generally more structured in nature and meetings are scheduled on a regular basis
More long-term and takes a broader view of the person	Short-term (sometimes time-bounded) and focused on specific development areas/issues
Mentor is usually more experienced and qualified than the 'mentee'. Often a senior person in the organisation who can pass on knowledge, experience and open doors to otherwise out-of-reach opportunities	Coaching is generally not performed on the basis that the coach needs to have direct experience of their client's formal occupational role, unless the coaching is specific and skills-focused
Focus is on career and personal development	Focus is generally on development/issues at work
Agenda is set by the mentee, with the mentor providing support and guidance to prepare them for future roles	The agenda is focused on achieving specific, immediate goals
Mentoring revolves more around developing the mentee professionally	Coaching revolves more around specific development areas/issues

In reality, there can be large overlaps between the roles of coach and mentor. A mentor may do some coaching and a coach may do some mentoring if he or she is working with someone over time on issues that relate to their career. Many people also understand mentoring to be a useful adjunct to coaching, specifically in providing career guidance and longer-term support, as opposed to the relatively short-term and performance-related focus of coaching.

Alongside the traditional idea of mentoring, there are now other types of mentoring that have come into existence (eg transformational mentoring). These are understood to refer to different concepts, many of which bear more similarities to coaching and/or counselling. It is therefore important to make sure that everyone understands what is meant by different terms, so that confusion is avoided.

Coaching vs counselling/therapy

There are obvious similarities between coaching and counselling activities, with much of coaching's theoretical underpinnings, models and techniques being derived from fields such as psychology and associated therapies, and applied in organisational contexts. However, while coaching and counselling both work within similar areas, they are not the same thing. They can, however, work together in a complimentary way in workplace settings. Counselling, is a highly skilled intervention focused on helping individuals address underlying

psychological problems. It can be useful if employees are unable to resolve difficulties or make changes to their behaviour during coaching, which may indicate deeper underlying problems/issues. Key differences between counselling and coaching are shown in Table 8.

Table 8: Differences between counselling and coaching

Counselling	Coaching
Broader focus and greater depth	Narrower focus
Goal is to help people understand the root causes of long-standing performance problems/issues at work	The goal is to improve an individual's performance at work
A short-term intervention, but can last for longer time periods due to the breadth of issues to be addressed	Tends for be a short-term intervention
Counselling can be used to address psycho-social as well as performance issues	Coaching does not seek to resolve any underlying psychological problems. It assumes a person does not require a psycho-social intervention
The agenda is generally agreed by the individuals and the counsellor	The agenda is typically set by the individual, but in agreement/consultation with the organisation
Other stakeholders are rarely involved	Other stakeholders (eg manager) are involved

Psychological assessment is a complex process that requires in-depth and specialised training. A professional coach will be keen to maintain the professional boundaries between coaching and the traditional therapies and will refer a client to an appropriate therapist/counsellor if they feel it will be useful and appropriate.

Watch out for the cowboys!

In the UK, the use of the designations 'psychologist', 'therapist', 'counsellor' are not restricted by law to those who are qualified, so purchasers need to beware of 'self-styled' psychologists, counsellors and therapists who may not have formal training or hold any degree of professional accountability. It is therefore important to check the qualifications, experience and membership of appropriate professional bodies of any firms or individuals that an organisation uses to support their workforce in a counselling or coaching capacity.

Some individuals offering coaching services are qualified therapists or counselling psychologists who are marketing their services in the name of coaching. When using these individuals, it is important to be sure of the type of approach the person intends to use during sessions and that they have appropriate business knowledge.

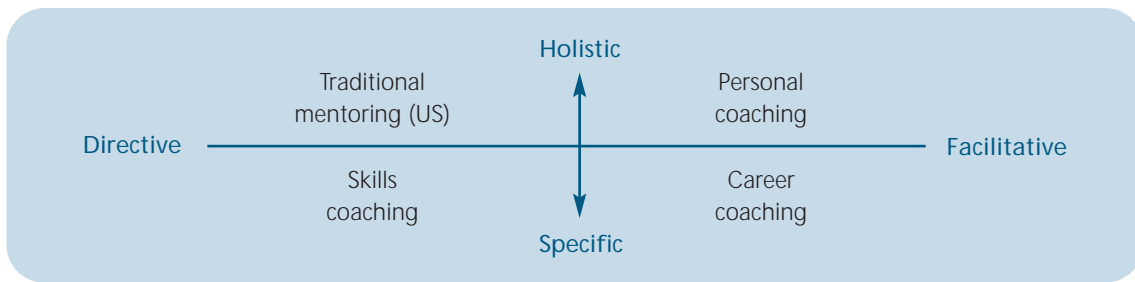
Modelling the differences between the 'helping behaviours

Some academics and practitioners have attempted to clarify some of the key differences between the common forms of coaching, mentoring and counselling via a series of helpful models.

Relationship between coaching style and the different helping behaviours (Britnor-Guest and Willis, 2004)

One way of looking at the differences between the different types of helping behaviour is to consider how directive the practitioner will be in their approach. To what extent will the person 'tell' the individual what to do or help them work out their own solutions to their problems? Another key differentiator is the scope of the activities. Does it concentrate on specific parts of a person's life (eg work issues) or does it take a more holistic perspective? These two dimensions and how they relate to the different forms of 'helping behaviours' are shown in Figure 5.

Figure 5: The relationship between coaching style and different types of helping practices



Model of the differences depending on whether the focus is business or personal content (Horner 2002)

Another useful way of considering the different types of development/helping activities is given by Caroline Horner from the i-coach academy, developed in conjunction with Morag Dwyer. The differences between coaching, counselling and consulting are discussed in relation to the extent to which activities deal with business content (high/low) or personal content (high/low). For example, counselling is understood to have high personal content and low business content, whereas consulting is seen as being the opposite – high in business content, and low in personal content. This model is shown below in Figure 6.

Coach/mentoring and other approaches – a framework for differentiating (Hay 1997)

Another useful dimension to think about is who is leading the activity – the individual, the organisation or a mixture of both? On this dimension, counselling is clearly individually led, but different types of mentoring and coaching will differ in the extent to which the individual or the coach/organisation are leading the activity. In Figure 7, different activities are plotted on this continuum as well as considering whether the objectives for the coaching are long-term and broad, or short-term and specific.

Figure 6: Helping activities differentiated by levels of business/personal content

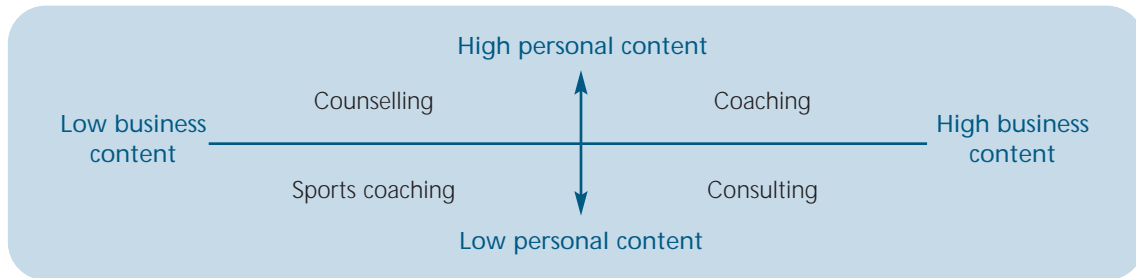
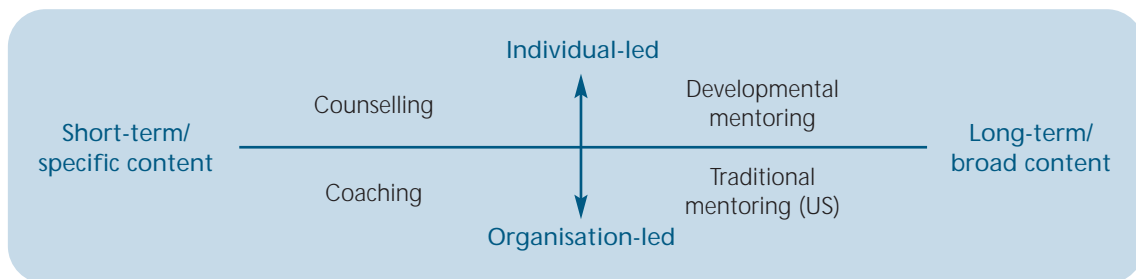


Figure 7: Coach/mentoring and other approaches: a framework for differentiating.



Niche types of coaching

To add to the varying definitions, there are also many niche types of coaching including executive coaching, performance coaching, skills coaching, developmental coaching, career coaching, to name but a few. Again, these terms tend to be used in different ways by different people.

Figure 8 (overleaf) outlines the most common types of coaching used by CIPD members (CIPD 2004). Bear in mind the finding that 50% of respondents reported that they didn't clearly understand the differences between the different types of coaching.

Figure 8: Which of the following best describes the type of coaching at your organisation?

Type of coaching	% of respondents who report using it
Performance	67
Skills	67
Development	59
Executive	34
Remedial	28
Career	27
Team	25
Life	8
Other	2

As you can see, the most common types of coaching in use are performance and skills coaching, which were both used by two-thirds of respondents. Coaching types aimed at the personal needs/concerns of employees, such as life and career coaching, were among the least common forms of coaching used.

So what is meant by these different terms?

Performance coaching. Coaching activities here are aimed at enhancing an individual's performance in their current role at work. The specific issues covered by the coaching will vary, but the aim will always be to increase their effectiveness and productivity at work. Generally, performance coaching derives its theoretical underpinnings and models from business and sports psychology as well as general psychological theory.

Skills coaching. This form of coaching focuses on the core skills an employee needs to perform in their role. Skills coaching provides a flexible, adaptive, 'just-in-time' approach to skills development. Coaching programmes are tailored specifically to the individual and are generally focused on achieving a number of skill development objectives that are linked to the needs of the organisation.

Career coaching. Coaching activities focus on the individual's career concerns, with the coach eliciting and using feedback on the individual's capabilities as part of a discussion of career options. The process should lead to increased clarity, personal change and forward action.

Personal or life coaching. This form of coaching provides support to individuals wishing to make some form of significant changes happen within their lives. Coaches help individuals to explore what they want in life and how they might achieve their aspirations and fulfil their needs. Personal/life coaching generally takes the individual's agenda as its start point.

Business coaching. Business coaching is always conducted within the constraints placed on the individual or group by the organisational context. The term is used to refer to any coaching activity that takes place in a business setting, so by definition overlaps with other terms.

Executive coaching. Organisations are now generally more willing to invest in coaching for their senior managers and executives. By improving the performance of the most influential people within the organisation, the theory goes that business results should improve. Executive coaching is often delivered by coaches operating from outside the organisation whose services are requested for an agreed duration or number of coaching sessions.

Practical tool: Making sense of the terminology and the coaching approach you want

The simple tool shown below can be used in a variety of different ways to help you define the type of coaching that best meets your needs.

Exercise 1: A useful exercise may be to map the key characteristics of the coaching approach/activity that would work well in your particular organisational context. On each of the dimensions below, mark a cross where your ideal approach sits. This can be used as part of the 'ideal coach profile' when selecting a coach.

Exercise 2: When considering introducing coaching to an organisation, it can be helpful to use the tool to draw out different people's understanding of the term 'coaching'. For example, ask all key stakeholders to mark a cross on the dimensions indicating what they consider 'coaching' to involve. By comparing answers, a discussion can emerge through which you can gain shared understanding.

Exercise 3: This tool can also be used in the coach selection process. You could ask the coach to discuss their approach with regard to the different dimensions, perhaps even marking it on the diagram. This can then be referred back to your original map of the key coaching characteristics you were looking for in a coaching approach. All of these dimensions could also be turned into questions to gain greater understanding of the coach's approach eg to what extent does the individual lead the agenda?



Making sure you sort through the terminology issues

Because of the terminology issues that surround coaching, all parties concerned should check that there is shared understanding. You can't assume that people are talking about the same thing when they refer to coaching or mentoring. In reality, it doesn't really matter whether the activity is labelled 'coaching', 'advising', 'counselling' or anything else, as long as everyone involved understands what it means in their specific situation. For this shared understanding of terminology to take place, the CIPD recommends that:

- Coaches must be encouraged to provide clients with a clear understanding of what they mean by the terms they use and the approach they offer. In this way, purchasers and users can make informed judgements about the nature of the activities on offer.
- To avoid serious misunderstandings, HR practitioners should check definitions and, more importantly, intended outcomes. It is necessary for the terms to be discussed by the users so that the overlaps in meaning are understood and the differences appreciated.

As a rule of thumb, it is probably best to simply pick the terms that most people find acceptable and then provide definitions to prevent misunderstandings.

Coaching standards

Organisations and coaches should try to convert the confusion around terminology into understanding of the overlaps, the distinctive objectives and the characteristics of each. The CIPD hopes that this Guide provides encouragement in this direction. However, further advances are progressing through a project being co-ordinated by the European Mentoring and Coaching Council (EMCC) with the collaboration of all the coaching professional bodies.

This project has drawn together information about coaching and mentoring practice from documented standards and competency frameworks created by experts in the field, professional bodies, private organisations as well as specialist coaching and mentoring training companies. The information has been distilled into a single comprehensive framework that makes sense of the overlaps and differences between the services on offer. The EMCC is currently in the process of collecting data to determine which competencies are core to all types of coaching practice, and which competencies are specific to the different 'types' of coaching and mentoring (eg executive coaching, developmental mentoring etc). More information about the project can be found on the EMCC website: www.emccouncil.org

Part 3 The key players in the coaching relationship

The primary relationship in any coaching activity involves the coach and the individual. However, it is not the only important relationship. Other key stakeholders include the person representing the organisation's interests – most frequently an HR practitioner and the individual's manager. Both of these parties are interested in improving the individual's performance and therefore their contribution to the organisation.

Figure 9 depicts these different relationships.

Figure 9: The four-cornered contract (Hay, 1995)

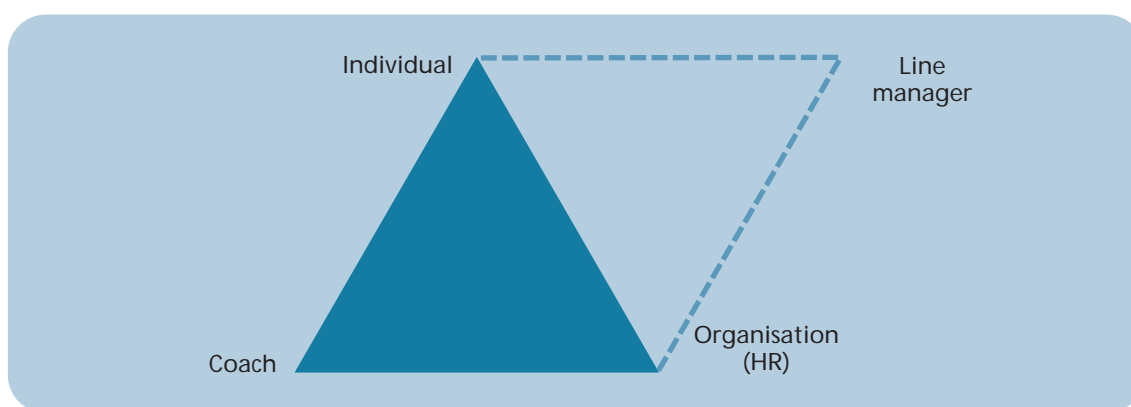


Figure 10 shows that there are different relationships that need to be managed for coaching to have maximum impact:

- **The individual and coach.** This is the most visible relationship, and requires good matching for it to work effectively.
- **The coach and HR.** These parties agree the contractual relationship, with the HR practitioner representing the organisation's interests. HR should thoroughly brief the coach so they understand the organisational context in which the coaching will take place.
- **The individual and HR.** HR must explain why the individual is being coached, and allay any concerns they have about it. They must also assess that there is a genuine need for coaching and that the individual is ready for it.
- **The individual and line manager.** The line manager must understand and be supportive of the individual during the coaching intervention, and for ongoing development plans. They can also be involved in helping the individual decide the development objectives for the coaching programme.
- **HR and the line manager.** HR must manage the line manager's expectations and explain his or her role in supporting the coaching relationship.

These relationships must be carefully managed for maximum benefit to be gained from a coaching initiative. HR practitioners play a critical role in making sure that all the other stakeholders to the coaching intervention are bought into the process and understand their roles in its success.

A crucial role for HR?

Eighty per cent of respondents to the 2004 CIPD training and development survey felt that 'HR has a crucial role to play in selecting and evaluating the impact of coaching initiatives.' Furthermore, 92% agreed that 'when coaching is managed effectively it can have a positive impact on an organisation's bottom line.' It therefore seems as though HR practitioners have a critical role in drawing up a framework for the coaching activities that take place to ensure value for money and alignment with the organisation's strategic goals.

In some organisations, individual managers or executives arrange their own coaching. When this happens and if the HR department fails to play a co-ordinating and overseeing role, the organisation loses a valuable opportunity to create a coaching strategy aligned with organisational goals and the overall training and development strategy. Because no evaluation is taking place, they are also losing the opportunity to build up a body of knowledge about lessons learned in the use of coaching in the organisation. Without HR overseeing the coaching, it will be very difficult to get a clear picture of what coaching is taking place and how effective it is. The evaluation of coaching activities will therefore be impossible. An overall perspective allows the HR team to identify pockets of good and poor practice and to plan any necessary remedial action. The HR team needs to have a good understanding of all the coaching taking place and to ensure it is grounded in the goals of the organisation.

Being a knowledgeable and discerning customer is crucial. HR practitioners may not necessarily have a great deal of expertise about the process of coaching, but many of the generic skills held by HR practitioners lend themselves to effectively managing coaching relationships. The skills and experience of selection interviewing, drawing up contracts/agreements, ensuring there are efficient measurement systems, supervising projects with multiple stakeholder groups, are all important parts of managing coaching activities. If, as an HR person, you are given responsibility for managing a coaching initiative, you should try to build up your knowledge of coaching processes, models and frameworks. This will enable you to become a more knowledgeable buyer of coaching services and to cut through the issues around terminology and jargon that we have profiled.

The key components of HR's role in managing coaching engagements

HR practitioners should get involved in coaching engagements from the outset. Key areas of HR involvement include:

- assessing an individual's need for coaching
- assessing an individual's readiness for coaching
- getting line managers on board
- determining best use of internal and external coaches
- running a rigorous coach selection process
- assisting in the matching process
- briefing the coach
- managing the contracting process
- monitoring effectiveness and measuring the impact
- capturing internal knowledge and evaluation data
- integrating coaching with other HR and development activity.

This list demonstrates just how much time and effort is needed to formally manage a coaching process, particularly in large organisations or in organisations where coaching is being offered to a large number of people. The details of these activities are tackled later. Figure 10 shows where in the Guide you can find this information.

Challenges for HR

The activities listed opposite illustrate how complex the role of HR can be in this area. The multiple stakeholders in coaching relationships create difficult issues that require consideration. Who is the primary client? Is it the client organisation because it pays for the coach? Or is it the individual end user because coaching requires an environment of trust to be effective? The most common answer to these questions is that both the individual and the organisation are clients, with their own goals and objectives for the coaching initiative. The coach and the HR practitioner must work to ensure that the needs and goals of both parties are aligned and are met by the coaching intervention. Ensuring clarity of understanding is crucial for managing issues around confidentiality and information flow.

Figure 10: Where to find further information in the Guide

Areas of HR involvement	Where to find further information in the Guide	Page
Assessing an individual's need for coaching	See Part 4: Making the case for coaching	33
Assessing an individual's readiness for coaching	See Part 4: Making the case for coaching	33
Briefing the individual	See Part 5: Preparation and setting the scene	42
Getting line managers on board and managing expectations	See Part 5: Preparation and setting the scene	42
Determining best use of internal and external coaches	See Part 6: Choosing a coach	45
Running a rigorous coach selection process	See Part 7: Coach selection and matching	51
Assisting the matching process	See Part 7: Coach selection and matching	51
Briefing the coach	See Part 8: Managing the onward engagement	62
Managing the contracting process	See Part 7: Coach selection and matching	51
Monitoring effectiveness and measuring the impact	See Part 8: Managing the onward engagement	62
Capturing internal knowledge and evaluation data	See Part 8: Managing the onward engagement	62
Integrating coaching with other HR and development activity	See Part 8: Managing the onward engagement	62

Other key challenges facing HR practitioners include:

- Integrating coaching with the bigger picture.** HR also holds the responsibility for ensuring that coaching activities are aligned with the strategic goals of the organisation, and that they are integrated with other HR/training plans and activities. At the moment it seems that this often doesn't happen – the 2004 CIPD training and development survey revealed that two-thirds of respondents who indicated coaching takes place in their organisation reported that there is no formal strategy that governs coaching activities. Of respondents who do have a strategy in place, the vast majority said that it only covers certain groups of employees and only 6% of respondents using coaching have a written strategy on coaching for all staff.
- Opening 'closed doors'.** A key problem for HR is when coaching happens behind 'closed doors' because senior-level employees bring in their own coaches and the activities aren't co-ordinated by HR. This means that there are no reporting structures and no accountability for the professional coaches. Organisations can't learn from such coaching engagements.

- **Meeting the needs of both the organisation and the individual.** Any HR practitioners who currently have a responsibility for procuring coaching will be aware of the challenge of meeting the requirements of the organisation and the individual being coached. The onus is on those buying coaching to ensure that they approach the area in an informed and structured way, if they are to achieve value for money.
- **Information flow and confidentiality.** Another issue to think about is how information from coaching conversations is used within an organisation, regardless of whether the coaching is external or internal. From the start, it is essential that HR is clear about what information the organisation wants so that the coaches and clients are clearly working towards specific goals. The clearer the goals, the easier it will be for the organisation to measure the results.
- **Scoping and controlling costs.** In making decisions about how coaching will be run in an organisation, there are several factors to think through. A factor that can't be ignored is cost. HR practitioners need to consider how resource constraints will affect how much coaching can be undertaken. Without a bottomless pit full of money, it's important to establish parameters about coaching in the organisation. Some questions for practitioners to consider are:

- Who should receive coaching – will there be limits?
- Which employee groups should we invest in?
- Will coaching be restricted to individuals of a certain level of seniority?
- Will coaching only be provided in relation to certain development activities?
- Will there be a limit on the number of hours available to each individual?
- Will you use internal or external coaches?
- How will you measure/evaluate success and value for money?

Without agreed parameters, coaching relationships can continue for long periods of time, becoming a permanent 'sounding board' for a person's work issues. This can mean costs can spiral. An ongoing role for HR practitioners therefore is to define the scope of coaching assignments and control costs.

Coaching is believed to have a key role in supporting other learning and development activities. For example, 93% of respondents in the training and development survey agreed that coaching is a key mechanism for transferring learning from training courses back to the workplace. An essential role for HR practitioners in creating effective conditions for coaching is to ensure that the culture and climate within the organisation is supportive of learning and development. In the survey, 80% of respondents agreed that 'coaching will only work well in a culture that supports learning and development.' Many practitioners and academics suggest that, ideally, a 'coaching climate' should exist within organisations. In Figure 11, David Clutterbuck (2004) offers advice on this issue.

Figure 11: Establishing a coaching climate (Clutterbuck, 2004)

So what exactly is a coaching climate? You will know you have a coaching climate when:

- Personal growth, team development and organisational learning are integrated and the links clearly understood.
- People are able to engage in constructive and positive challenging.
- People welcome feedback (even at the top) and actively seek it.
- Coaching is seen as a responsibility of managers and their direct reports.
- There is good understanding at all levels about what effective developers and developees do.
- Coaching is seen primarily as an opportunity rather than as a remedial intervention.
- People are recognised and rewarded for their activity in sharing knowledge.
- Time for reflection is valued.
- There are effective mechanisms for identifying and addressing barriers to learning.
- People look first inside the organisation for their next job.
- There are strong role models of good coaching practice.

So how do you create a coaching climate?

- By ensuring that managers have at least the basic skills of coaching.
- By equipping all employees with the skills to be coached effectively.
- By providing an advanced coaching skills programme for senior managers and HR staff.
- By providing opportunities to review good coaching practice.
- By recognising and rewarding managers who demonstrate good coaching behaviour and commitment to coaching.
- By measuring and providing feedback on the quality, relevance and accessibility of coaching.
- By ensuring that top management provides strong, positive role models.
- By identifying cultural and systems barriers to developmental behaviours.

HR practitioners can track how much the organisation is perceived to support development and coaching activity in a variety of ways, including through employee attitude surveys. This is something that can be measured and used as a broad benchmark of progress towards a coaching culture.

Creating a coaching culture generally involves implementing a long-term, strategic organisational development programme in an organisation. It is therefore not a light undertaking for HR practitioners. If a coaching culture doesn't already exist within an organisation, coaching can still be an effective intervention, but there may be challenges for HR in gaining support and buy-in to the initiative, as well as getting it effectively embedded.

Part 4 Making the case for coaching

Whether coaching is an appropriate intervention depends on several factors: whether the organisational conditions are conducive to coaching; whether the coaching is the most appropriate development intervention for an individual; and whether the individual is 'ready' for coaching. In this part of the guide, these different areas will be looked at in turn to allow practitioners to make informed decisions as to whether coaching is really the right answer.

Organisational conditions for coaching

As discussed in part 3, for coaching to be successful, the organisational culture and climate should be supportive of learning and development. Many writers go further and advocate a coaching culture that places emphasis on learning, development and knowledge-sharing (Caplan 2003).

However, there are some particular organisational situations where coaching may be particularly appropriate as a development intervention. Some examples of these are:

- **Talent shortages.** When organisations are suffering from significant skills shortages, money may be better spent developing the skills of current employees through interventions like coaching, rather than spending a great deal of money recruiting external candidates.
- **Small or fast-growing businesses.** People who initially set up small businesses don't necessarily have the skills to manage larger businesses and the growing number of people they need to employ. It's also unlikely that they can be away from work for extended periods of time for development activities. In this situation, coaching can offer targeted, timely development on identified issues/areas that can be fitted into the individual's busy schedule.
- **Belief that coaching can deliver long-term performance improvement.** Organisations should only invest in coaching when they think it will deliver significant and long-term improvements in individuals' performance – ie that future performance will greatly exceed current performance, which can be translated into business benefits.
- **The organisation expects that behaviour can be changed in a short period of time.** Organisations should only invest in coaching if they think that the issues that need to be addressed can be achieved in a relatively short period of time.
- **During times of organisational change.** Periods of major organisational change can require significant shifts in the behaviour and attitudes of some employees in order to fit in with new structures or cultures. Coaching can help individuals make these necessary changes.
- **Changes in job role.** Coaching can help individuals who are moving to a new job that requires different skills and abilities. Coaching can be a valuable short-term intervention to help people adapt and cope with their role change.

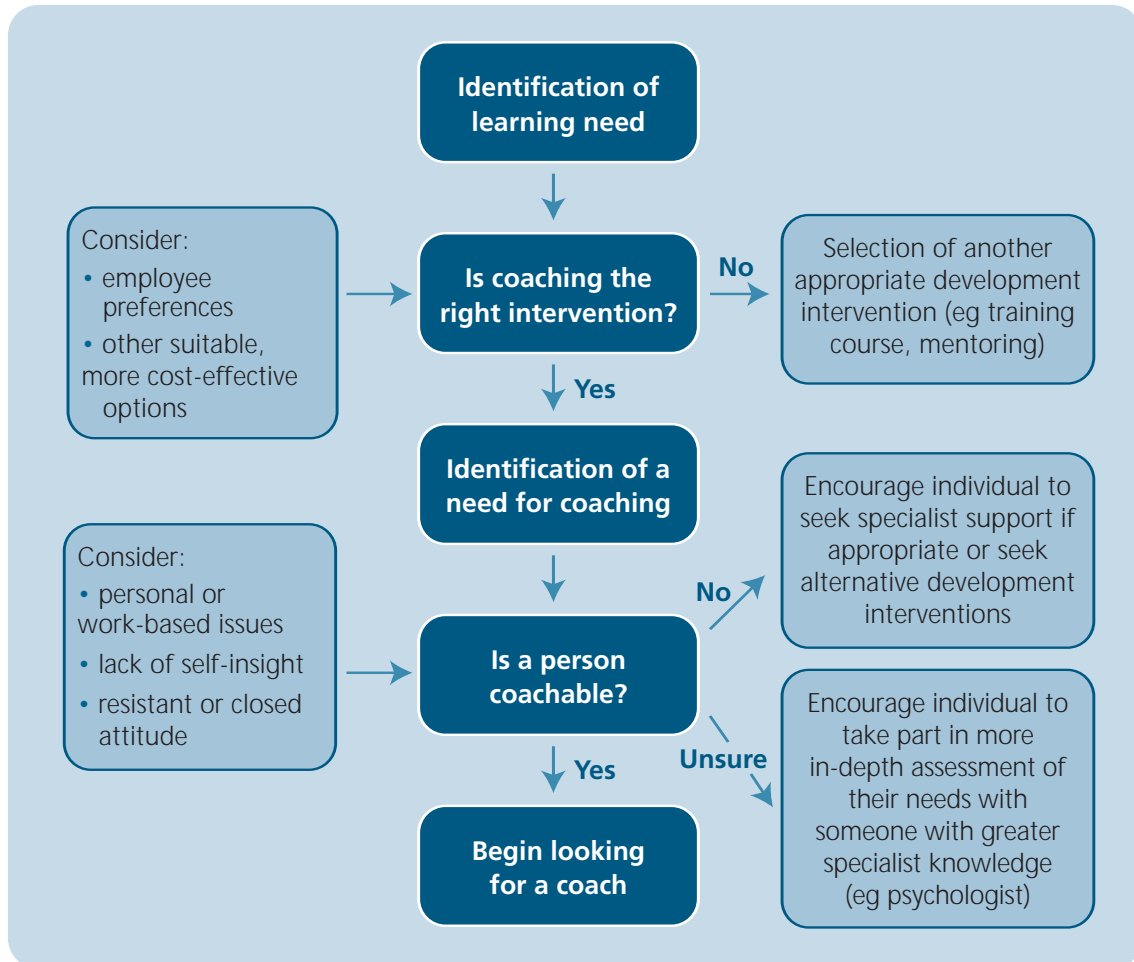
- **Supporting expatriates.** Coaching can offer support for expatriates who have to adjust to a new culture and country. These people often have very specific requirements and they need immediate support as issues arise.
- **Developing the skills of 'valuable' technical experts.** Where certain employees have high levels of specific skills and experience (or critical relationships with contractors/suppliers etc), the organisation might have difficulty replacing its human capital. In this situation, it may be more appropriate to provide coaching to these managers to improve or develop some of their other skills (interpersonal/managerial) so that their careers can progress within the organisation.
- **Support for future leaders or senior executives.** Senior managers or executives being groomed for leadership roles may be hesitant to attend training courses, as they may feel that they should already have the skills, expertise etc. In this situation, coaching can be a suitable intervention as it is confidential, personal and 'safe' development option where the individual is using an objective, external person to help them with their development.

Assessing when there is a need for an individual to receive coaching

Identifying that an individual could benefit from some coaching can happen in a variety of organisational settings. The first step will be the identification of some kind of learning or development need. This is most frequently articulated by the individual themselves, their line manager or by a member of the HR department (eg during a development centre). Once a learning need has been identified, the next step is for the manager and the individual to decide how best the need can be met.

The rise in the popularity of coaching in recent years means that there is a danger that coaching can be seen as a panacea for all kinds of development needs. However, it is important that coaching is only used when it is genuinely seen as the best way of helping an individual learn and develop. Coaching is just one of a range of training and development interventions that organisations can use to develop their employees. It can also be an expensive proposition, with costs quickly mounting up even if the coaching only lasts a few months. It is therefore necessary to make sure that other possible avenues for development are fully explored. The merits of coaching should be considered alongside other types of development interventions, such as training courses, mentoring or on-the-job training. Employee preferences should also be borne in mind. While coaching can be a very effective development tool, as with any learning intervention, it will be most effective when a genuine need for it is identified, and when it is the best development tool for the specific purpose. Decisions as to whether coaching is an appropriate approach are illustrated in Figure 12.

Figure 12: Decision tree: Is coaching an appropriate intervention?



Questions to help you decide whether coaching is the most appropriate course of action

- What are the developmental goals for the individual?
- What will happen if no coaching occurs?
- Are there any alternative learning interventions to consider?
- What is the impact the coaching is hoped to deliver?
- Are there any other development options that will deliver the same results?

Examples of development needs when coaching may be an appropriate solution

- **Developing an individual's potential.** Sometimes an individual can be performing perfectly well, but could be even more successful with some assistance. In this situation, the coach is not helping the individual to 'fix' any particular problem, but instead will try to help motivate the individual to consider their future plans and next steps in their job or career.
- **Poor interpersonal skills.** Some individuals in the workplace are highly competent, technical experts. However, they can have poor interpersonal skills that make them appear arrogant or stubborn to those they work with. Coaches can help managers to better 'read' interpersonal situations and be more effective in their interactions with colleagues.
- **Poor conflict management skills.** In some cases, managers may handle conflict situations in an aggressive and non-compromising way that antagonises their colleagues. This may be quite intimidating to peers and team members. Coaching can help these individuals to develop the skills of negotiation and compromise so that conflict is resolved more effectively.
- **Poor skills at developing others.** Some managers have difficulty supporting the development of their team members. Coaching can help managers develop junior colleagues more effectively by learning some coaching skills themselves.
- **Developing a more strategic perspective.** As managers move from management or front-line positions to more senior levels, they often need assistance in gaining a more strategic perspective. This involves making decisions based on the best interests of the organisation as a whole, rather than their specific area of the business. Coaches can help managers to become more sensitive to wider organisational concerns and understand opportunities and problems occurring across multiple business units.
- **Developing new skills due to a change in role.** In instances where organisations restructure or refocus their workforce, some individuals may be required to develop new skills very quickly. An example is when an individual may move into a more customer-facing or business-development role. This can be quite daunting and coaching can help them to develop these skills and be more confident and effective in their new role.

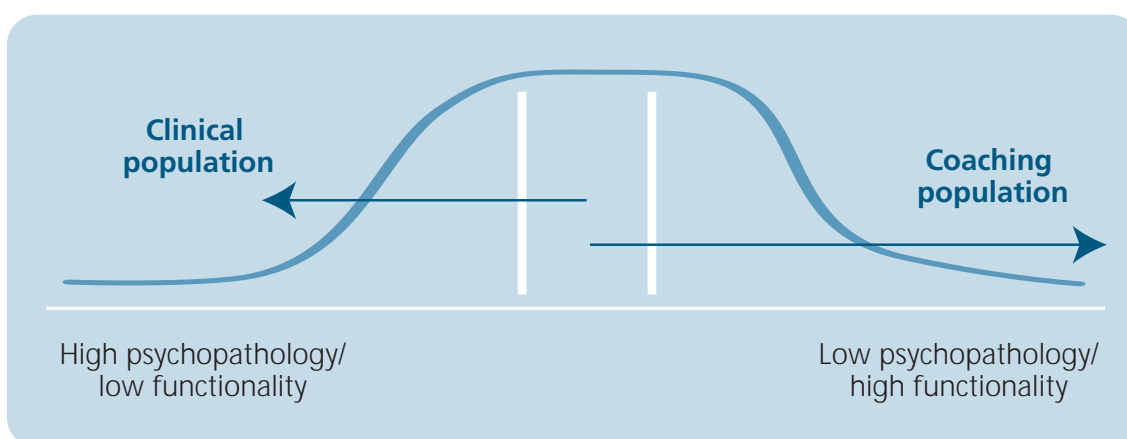
Assessing individual readiness for coaching

There are some individuals who may not respond well to coaching for a variety of reasons. Sometimes, their problems are best dealt with by an intervention other than coaching, and in other circumstances their attitude may interfere with the effectiveness of coaching. Before a coaching intervention is begun, organisations need to assess an individual's 'readiness' for coaching. Coaching may not be an appropriate intervention in the following circumstances:

- **If the individual has a personal or family crisis.** In this situation, the individuals will certainly need support and somebody to talk to, but that person is not a professional coach. A highly confidential counselling intervention is likely to be more appropriate.

- **If the individual has psychological problems.** People suspected of suffering from psychological problems can be offered referral to appropriate specialist support. Coaches don't necessarily have the depth of psychological training to deal with these issues, nor the medical training to address any physiological components that may also be part of the problem (eg addiction, depression). Figure 13 illustrates this.

Figure 13: Grant (2001)



- **If the individual has a developmental need which is widely shared in the organisation.** In this case the individual may not need an intervention as costly or intensive as coaching. A course or development programme may be an equally effective and more cost-effective solution.
- **If the individual lacks self-insight.** If an individual is without adequate self-insight or has no ability to modify his or her behaviour from situation to situation, coaching will not be effective. In cases like this, a coach may not be able to overcome such strong resistance to change.
- **If the individual is resistant or closed to coaching.** Coaching works best when there is a receptive audience. It is likely to be ineffective if the person is forced into coaching under duress because they are likely to be uncooperative. Attempts should be made to understand why they feel this way.
- **If the individual continually engages in socially inappropriate behaviour.** Once this kind of behavioural problem, for example, behaviours bordering on sexual harassment, has become more frequent and ingrained, coaching is not an appropriate intervention. Either the person in question will need long-term, intense counselling or will be subject to the formal disciplinary process. As coaches can't refuse to testify against clients in any subsequent legal proceedings, it is also in the best interests of employees themselves to have professional counsellors with whom to discuss problems in total confidentiality.
- **If the individual sees the coaching as a 'quick fix' and doesn't take responsibility for changing their behaviour.** Such individuals are unlikely to be successful if provided with coaching. Long-term successful behavioural change requires a great deal of effort and hard work for it to really happen.

- **If the individual is leaving the company or retiring.** In this situation, it is unlikely that in such a short timeframe the organisation will see any benefits in terms of improved performance. Outplacement or career counselling may be a more appropriate solution.

In many of these situations, we are looking at the boundaries between coaching and therapy. Sometimes a clinical intervention will be more appropriate support for the individual. A coach should be able to assess if a person is coachable, but ideally the HR practitioner should try to identify any wider issues before the coach is contracted.

Questions to consider when assessing an individual's readiness for coaching

- Does the problem/development area require more in-depth psychological expertise?
- Is the problem/development area personal or work-based?
- Is the individual a willing participant in the coaching?
- Does the individual accept that the coaching requires considerable effort from them for it to be successful? Are they resistant to change?
- Is there another equally effective development option that may be more cost-effective?

The business case for coaching

Is coaching worth the time and investment? Based on the results from the 2004 CIPD training and development survey, it would appear so. Two-thirds of respondents to the survey reported that they felt their activities had been 'effective' (61%) or 'very effective' (6%) in meeting objectives. This is a positive response and is mirrored by the fact that 99% also felt that 'coaching can deliver tangible benefits both to individuals and organisations.' Furthermore, 92% also agreed that 'when coaching is managed effectively it can have a positive impact on an organisation's bottom line.' This is a strong endorsement by the HR community about the value and impact coaching can have in an organisational setting.

However, some commentators contend that coaching is simply an HR fad. In making the case for coaching, HR practitioners need to be able to discuss the benefits that both the organisation and individual can expect to receive.

Understanding the People and Performance Link: Unlocking the black box (CIPD 2003)

The CIPD 2003 Research Report, *Understanding the People and Performance Link: Unlocking the black box*, may offer an understanding of how HR activities such as coaching can impact on individual and organisational performance. This is illustrated in Figure 14.

Figure 14: How coaching can impact on business performance



The research found that employees' job performance is a function of their ability, their motivation to engage with their work, and the opportunity to deploy their ideas, abilities and knowledge effectively. Coaching contributes to this by offering an opportunity to improve the motivation and skills of employees, and enhance their performance. Coaching can deliver this by:

- developing employee skills in line with organisational objectives
- engaging employees' with their work, making them feel valued and fostering commitment to the organisation
- promoting self-responsibility and initiative, and facilitating adaptation to new challenges and change
- accommodating and supporting employees' obligations to their home lives so that they are productive and effective while they are at work.

By improving the performance of individuals, coaching should enable the organisation to achieve superior performance in terms of labour productivity, cost-effective investment in HR, quality, innovation and customer satisfaction.

What does the research say? Is there a business case for coaching?

Some research exists about the impact of coaching interventions in organisational settings, but it is far from comprehensive. There is a broad base of research about coaching more generally, particularly from the sports world and in educational settings, and this does tend to suggest that coaching is effective in improving aspects of an individual's behaviour. There is also a wealth of research relating to specific elements of coaching, such as the use of specific techniques/tools (eg goal-setting). However, less is known about the impact of coaching as an intervention in organisations, and particularly about the benefits of using external coaches. Horner (2002) comments: 'There was surprisingly little empirical research on the efficacy of executive coaching in the practice of management and leadership. This is particularly so for the practice of coaching by external coaches, although this lack of empirical foundation has not inhibited practitioners or authors from advocating their approaches or publishing their views.'

Research that has investigated the views of the participants in coaching generally has very positive findings. For example, Hall et al (1999) reported that clients most frequently rated the overall effectiveness of their coaching experiences as 'very satisfactory'. And a recent study by the International Coach Federation found a wide range of benefits reported by individuals who take part in coaching. These included:

Increased self-awareness	68%	Improved quality of life	43%
Better goal-setting	62%	Enhanced communication skills	40%
More balanced life	61%	Increased project completion	36%
Lower stress levels	57%	Improved health or fitness level	34%
Enhanced self-discovery	53%	Better relationship with co-workers	33%
Increased confidence	52%	Better family relationships	33%

There appears to be a genuine belief from those who take part in coaching that it does deliver benefits.

But what about benefits delivered to the organisation? Like many other training activities, it's difficult to identify whether coaching has a direct effect on bottom-line performance because of all the other factors that influence organisational performance. Studies are nonetheless emerging to substantiate the belief that powerful benefits are achievable. Several studies have shown that coaching positively influences productivity, quality, customer service and retention of best employees. One example is a study by Manchester Consulting Inc., aimed at demonstrating the impact of executive coaching (using external coaches) on the organisation's bottom line. They describe a chain of impact originating in coaching: 'coaching translates into doing, doing translates into impacting the business, this impact can be quantified and maximised' (McGovern et al 2001).

The study results demonstrated the effectiveness of coaching and estimated an average return on investment of \$100,000 for the sample. In addition, a recent survey by MetrixGlobal LLC in the USA showed that coaching produced a 529% return on investment alongside significant intangible benefits to the business.

So, it appears as though evidence is emerging, but much more research is needed before there can be said to be 'solid evidence' of the benefits of coaching. Figure 15 lists some of the common benefits that coaching is purported to deliver to individuals and organisations. These can be used by HR practitioners in building the business case for using coaching in their organisation.

Figure 15: Organisational and individual benefits of coaching

Benefits for the individual

- Learn to solve own problems
- Improve managerial and interpersonal skills
- Have better relationships with colleagues
- Learn how to identify and act on development needs
- Have greater confidence
- Become more effective, assertive in dealing with people
- Have a positive impact on performance
- Have greater self-awareness and gain of new perspectives
- Acquire new skills and abilities
- Develop greater adaptability to change
- Improve work–life balance
- Reduce stress levels

Benefits for the organisation

- Improve productivity, quality, customer service and shareholder value
- Can gain increased employee commitment and satisfaction, which can lead to improved retention
- Demonstrate to employees that an organisation is committed to developing its staff and helping them improve their skills
- Support employees who've been promoted to cope with new responsibilities
- Help employees to sort out personal issues that might otherwise affect performance at work
- Gain a satisfactory process for self-development
- Support other training and development initiatives eg reduce 'leakage' from training courses

Part 5 Preparation and setting the scene

Before selecting and recruiting coaches to work with your organisation, there are some important preparatory activities that require attention. Undertaking these will ensure that the coaching initiative has been carefully thought through and that all stakeholder groups are clear about what it will involve, and what their role and responsibilities entail. These include: setting expectations and briefing the individual; gaining the buy-in of line managers; and ensuring clarity of approach and goals.

Setting expectations and briefing the individual

Coaching works best when the individual is both a willing and an informed participant. The more the individual understands about the coaching process and is engaged with it, the easier it will be for the coach to work with them. Before the coach and the individual are introduced, HR has an important role (working closely with the line manager) in providing information to the individual and preparing them for the coaching activities.

In the past, coaching has often had negative connotations, being seen as a remedial activity. It is therefore essential that HR practitioners or the individual's line manager spend time carefully explaining to individuals the purpose of the coaching, and making sure they don't misinterpret why it's being offered. This is crucial for realistic expectations to be set. It is also important to understand that individuals may feel apprehensive – time should be taken to explain how the process will work in order to allay fears and start the initiative off on the right foot. Key messages to convey to individuals include:

- The organisation values you and wants to further develop your skills.
- This is an opportunity for you to have some one-to-one personal development time.
- The coaching will be confidential (be clear about what information, if any, will be fed back to the organisation).
- You will have to do the work – there is no magic button to be pressed here.

Managing the individual's expectations is crucial. Provide the individual with an honest explanation of why you are recommending that they take part in some coaching, being as specific as possible. This should give them a clear understanding of why they are being offered the coaching. It's equally important not to 'over-promise' anything to the individual at this stage – for example, by taking part they are not guaranteed a promotion or any other specific career opportunity.

Areas for HR or the line manager to cover when briefing individuals are:

- the purpose of the coaching
- why they have been selected
- the objectives for the coaching from the organisation's perspective
- the length of the coaching arrangement (number of sessions; length of each session)
- who the coach will be
- typical outline of a coaching session
- confidentiality and reporting back of information
- how the coaching will be evaluated.

Being clear and supportive from the outset will motivate the individual. At an early stage, they should be encouraged to consider what they would like to achieve from the coaching sessions and identify specific areas to focus on. The individual should always own their learning. When people are learning things they have identified as important, relevant and beneficial, they will be better motivated to commit to specific and practical courses of action to make it happen.

Gaining the buy-in of line managers

The line manager, while not in the primary relationship in coaching (the coach and the individual), is nonetheless an interested party. HR must ensure that the line manager understands their role in making the coaching work, and does not simply see it as an easy way to pass on responsibilities for supporting staff development.

HR practitioners should:

- Explain what coaching is, and what it is not to build realistic expectations of outcomes.
- Explain how the coaching will benefit the individual, but also how this will translate into improved contribution to the team.
- Help the manager understand issues of confidentiality.
- Manage expectations about how much information they will receive back on the progress of the coaching.
- Explain how to identify signs that the individual is finding the coaching too demanding.

Managers should set an example by taking the coaching activities seriously and encourage the individual to spend time and effort thinking about their development and onward career plans. HR practitioners need to explain that as part of their role in supporting the coaching initiative, the line manager:

- must provide the individual with time to undertake the coaching
- must not expect to get information back from the coach on the individual, unless it has been explicitly agreed with the individual and the coach
- should not put pressure on the individual to meet unrealistic goals or meet goals in unrealistic timeframes
- should discuss progress with the individual and what they feel they have gained
- should recognise progress and reward achievement of coaching goals.

Conveying these messages and ensuring managers take them on board is a key activity for HR practitioners as it can have a real impact on the likely success of a coaching initiative.

Ensuring clarity of approach and goals

Considerable money, time and energy will need to be invested to make coaching work effectively and it is important to be clear about exactly what the coaching arrangement is trying to achieve.

Questions that need to be asked include:

- What performance improvements are desired?
- What are the organisational goals for the coaching intervention?
- Are the organisational conditions conducive to the type of coaching you are planning to introduce?
- Is the individual 'ready' for coaching?
- Does the individual understand why they have been offered coaching?
- Is the line manager supportive and ready for the coaching initiative? Do they understand their role in supporting the individual?
- What is the budget for the programme?
- Who will be eligible for coaching? How many sessions will initially be planned?
- How will we measure success, effectiveness and value for money?

When these questions have been thought through, and clear answers have been agreed, the selection and recruitment of the coach(es) can begin. Many of the answers to these questions will also be useful in the evaluation of the coaching initiative.

Part 6 Choosing the right coach

The complex coaching marketplace makes decisions about the choice of coach unclear and difficult to establish. There is little agreement about the characteristics of a 'good' coach and much debate about what kind of experience, background and qualifications are really needed.

Because of this, HR practitioners need to be astute 'buyers' and be clear about exactly what they want. They need to build up their own knowledge of coaching so that they can make good decisions during selection and recruitment. This part of the Guide offers a template of issues that need to be considered, as well as guidance about the selection process.

Internal or external?

The first key decision is whether to use external coaches or internal coaches. Many organisations, particularly smaller ones, will simply not have the internal capability and it may be more cost-effective to hire an external coach, rather than train someone internally. Organisations that are undertaking a considerable amount of coaching, however, may find it more cost-effective to build up their internal capability and only use external coaches in certain specific situations. Apart from the impact of cost and resource issues, there are also some specific situations where either internal or external coaches may be preferable. Hall et al (1999) suggest the use of internal coaches when a quick intervention is needed and detailed knowledge of the corporate culture is critical. In contrast, external coaches may be more appropriate when there are highly sensitive or confidential issues to be addressed or when a coach with extensive and diverse experience is needed. Figure 16 provides a summary of the different reasons for using internal and external coaches.

Figure 16: Use of internal and external coaches

External coaches are preferable:

- For providing sensitive feedback to senior business leaders. For political reasons, this can be difficult for an internal coach
- For bringing specialised expertise from a wide variety of organisational and industry situations
- When individuals are concerned about 'conflict of interests' and whether confidentiality will be observed
- For providing a wider range of ideas and experience
- For being less likely to judge and being perceived as more objective.

Internal coaches are preferable:

- When knowing the company culture, history and politics is critical
- When easy availability is desired
- For being able to build up a high level of personal trust over a period of time
- For not being seen to be 'selling' consulting time
- For keeping costs under control – and may be less expensive.

This Guide focuses on the use of external coaches, so this part will look at the profile of a good external coach, and how HR practitioners should go about recruiting and selecting coaches to work in their organisation.

What does the profile of a good external coach look like?

The variable quality of coaches who are working in the industry has resulted in practitioners adopting a more discriminating approach in order to identify high-calibre coaches and secure a quality service. New research from the University of Central England and Origin Consulting (Arnott and Sparrow 2004) reveals that some large organisations that use coaching extensively are already using fairly stringent criteria. Apart from the right cultural fit and personal style, the research indicates that they are also keen to establish other coaching credentials such as evidence of a positive track record, having a structured approach, relevant qualifications, adherence to professional standards and evidence of supervision of coaches.

Here are some of the areas that HR practitioners should consider when selecting coaches:

- **Appropriate level of coaching experience.** Different levels of coaching experience may be required, depending on the complexity of the issues being addressed, as well as the seniority of the individual. The coach needs to be 'fit for purpose'. For example, the level of experience and skill set of a coach needed to provide career coaching for a junior manager would be different from those needed when an executive is being coached. To ascertain their level of experience, the coach should be questioned about how many hours of coaching they have delivered, how many coaching assignments they have delivered, what kinds of issues they have coached individuals for, and at what level of seniority they usually work.
- **Relevant business/industry experience.** An interesting, and debatable, criterion when selecting a coach is whether to look for candidates with relevant business experience (eg of a particular job, organisation or industry sector). Opinions differ as to whether this is a necessary requirement. Most people would agree that coaches do need strong understanding of organisational dynamics and the business world to be effective. However, direct experience of a particular industry or organisation is unlikely to be a necessary requirement for a person to be an effective coach. It is important to remember that, while the coach should have a sound knowledge of business, their real contribution is their ability to help individuals learn and develop. In some cases, though, industry experience may be desirable. In particular, relevant experience can be useful in establishing the 'face validity' of the coach (ie for coaches to have credibility with the individuals being coached). The competence and credibility of the coach is a major part in the process of winning over the individual and creating a good working relationship.

Some commentators point out that hiring a coach on the basis of specific experience can be counterproductive. One of the main benefits of using external coaches is their neutrality and objectivity. They can uncover limiting beliefs, values and assumptions that may be obstructing the strategic objectives of the individual and the organisation. Coaches should be hired for their ability to help someone see opportunities for improvements in performance as well as practical ways to help them make changes. It should also be noted that, if necessary, HR (working with the coach) can bring in other experts to give specific technical advice or skills coaching.

- **References.** Talking to previous clients of the coach is a good way of finding out about their style and skills, as well as how effective they were in producing the desired results. A good coach should always be able to supply references and it's important for HR practitioners to check them early on in the process to accurately establish their credentials, experience and ability to deliver.
- **Background of the coach.** Coaches come from a variety of different professional backgrounds. Examples include human resources, occupational psychology, training and development, sports psychology and management development. Naturally, these different backgrounds will mean that the coaches will bring some very different experience and skills to the coaching relationship. One of the most contentious debates is whether or not a coach should have a background in psychology. This is covered in further detail in the section on qualifications and training (page 48). There are no right and wrong answers here – the key is to find a good fit with your organisation and the needs and purpose of the coaching intervention.
- **Supervision.** Supervision is a formal, independent process of reflection and review to enable the practitioner to increase their self awareness, develop their competence and critique their work with their client (Lane 2002). Professor Mike van Oudtshoorn and Professor David Lane from the International Centre for the Study of Coaching (ICSC)/Professional Development Foundation suggest a number of benefits that supervision can deliver:
 - It offers protection to clients – cases are discussed with trained professionals who are able to identify areas of potential concern and offer advice or referral to specialist support if appropriate.
 - It offers coaches the opportunity to reflect on their work and gain insights to improve their interventions.
 - It offers coaches the opportunity to identify their own personal strengths and weaknesses as a coach in order to realistically judge what limitations to set with respect to the type of work they undertake.
 - It offers coaches the opportunity to learn from peers who have had similar cases and experiences to further develop their skills as a coach.
 - It offers coaches the opportunity to keep up to date with professionals developments in the field and to continually work to increase their competency as a coach.

Because of these benefits, many in the coaching world believe that supervision is an important part of a coach's continuing professional development. There is less agreement, however, about what exactly constitutes 'supervision' and whether it is necessary throughout a coach's career or just while they are being trained. During selection, HR practitioners can question coaches about their supervision arrangements so that they feel comfortable with how they review their coaching relationships and keep their skills up to date.

- **Breadth of tools, techniques, models.** Coaches should have an extensive 'kit bag' of tools and techniques that they use in different situations and with different clients. Coaches should be able to clearly describe their favoured approaches, but you should watch out for coaches who push particular models and are unable or unwilling to flex their approach to suit a particular individual/organisation. Good coaches will use models, techniques and frameworks from a wide range of theoretical backgrounds, including organisational theory, occupational psychology, psychometrics, learning and counselling.

HR people should not be overawed by the high number of different models, frameworks or techniques. As with many things, the simplest tools/techniques are often the most effective. Coaches should use tools that are 'fit for purpose' to encourage reflective learning and change, and they should be able to describe these clearly and concisely during selection.

- **Understanding of boundaries and approach to referral.** Coaches should understand the boundaries of their expertise. This means that coaches should not knowingly accept an individual into a coaching programme if they need specialist support beyond the competence of the coach or the resources available. In this situation, the coach should encourage the individual to seek appropriate support from a qualified professional. It is essential that coaches understand their own limitations and can see when their methods/techniques are not able to address an individual's needs. In this situation, the coach, in conjunction with HR, should follow a process to identify an appropriate practitioner to refer the individual on to.
- **Relevant qualifications and training.** Coaches should be able to demonstrate that they are competent in the provision of coaching services. One way of proving this is to demonstrate that they possess a relevant qualification. A considerable debate surrounds what is considered a suitable 'relevant qualification'. A key debate is whether or not coaches need to be fully qualified as chartered psychologists with the British Psychological Society (BPS). Advocates suggest that these individuals will have a solid understanding of how people work, covering topics such as personality, learning, behaviour, motivation and so on. Berglas (2002) argued: 'I believe that in an alarming number of situations, executive coaches who lack rigorous psychological training do more harm than good. By dint of their backgrounds and biases, they downplay or simply ignore deep-seated psychological problems they don't understand.' However, other parties argue that although coaches need a good understanding of relevant psychological principles and theories, it is not necessary for them to be formally qualified as a chartered psychologist. This is because coaching qualifications should cover relevant psychological theories in enough depth to provide individuals with a necessary grounding for them to operate as a coach.

The training of coaches should be fit for purpose. There is definitely a place for short introductory courses, but, as with any discipline, expertise will vary depending on the length of the course, level of qualification, depth of study, practical experience of delivery and extent of supervision and support received while studying.

There are now a number of different training routes for coaches, and new professionals have a wide range of options to choose from. Specific coaching qualifications, ranging from masters-level to short courses, are being offered by institutions across the UK and across the world. Understandably, a qualification that is specific to 'coaching' would seem like the most relevant qualification for a coach to have. However, people should remember that these qualifications have only been available relatively recently and therefore the majority of professionals delivering coaching services will not possess one of these newer qualifications. In such cases you should examine their other formal qualifications and experience.

It is also worth noting that if you are employing a coach for the specific transfer of skills (eg skills-based coaching on presentation skills), you should look for any further 'skills-based' qualifications they might need.

There is a large number of providers involved in training and accreditation in the fields of coaching. Useful sources of information on page 74 provides information about some of the different coaching providers, including their contact details and details of the courses offered.

- **Membership of professional bodies.** Buyers of coaching services should certainly consider membership of professional bodies as part of their selection criteria. Professor Stephen Palmer, Past Chair of the Coaching Psychology Forum, believes: 'the good practitioners are likely to be a member of coaching-related professional bodies, have relevant qualifications and take part in ongoing continuing professional development.' As the table in the appendix demonstrates, all the main professional bodies demand that members adhere to codes of conduct and ethics with associated complaints procedures. While this is not a watertight guarantee, it does offer some avenue for complaint if the services delivered are unsatisfactory.
- **Professional indemnity insurance.** Coaches can be asked whether they subscribe to professional indemnity insurance. Holders of professional indemnity insurance may be understood to take their professional services more seriously by preparing for any situations where they unintentionally have a negative impact on their clients. In order to be clear, HR practitioners can ask coaches whether or not they hold professional indemnity insurance, with whom and for how much. This also provides the organisation (and HR practitioner) with some legal protection if problems arise as a result of a coaching intervention introduced by them. Before a coach is formally hired, the HR practitioner should ask to see their certificate of insurance.
- **Other qualities/personal characteristics.** The best coaches are those who give honest, realistic, challenging, feedback, are good listeners and suggest good ideas for action. Beyond looking for specific qualifications, experience and knowledge, it is important to look for coaches who have certain qualities, skills or personal characteristics that are critical to successful coaching. Different qualities may be needed depending on the specific individual, the problems being tackled and the organisational context. However, it is widely agreed that there are some general skills that characterise effective coaches. These include:

- Self-awareness and self-knowledge
- Clear and effective communication skills (verbal and non-verbal)
- Relationship-building skills (including ability to establish rapport)
- Flexibility of approach
- Listening and questioning skills
- Ability to design an effective coaching process
- Ability to assist goal development and setting, including giving feedback
- Ability to motivate
- Ability to encourage new perspectives
- Ability to assist in making sense of a situation
- Ability to identify significant patterns of thinking and behaving
- Ability to challenge and give feedback
- Ability to establish trust and respect
- Ability to facilitate depth of understanding
- Ability to promote action
- Ability to build resilience

The European Mentoring and Coaching Council (EMCC) has drawn together an extensive map of the specific knowledge, skills, behaviours and personal attributes of coaches and mentors that relate to the general abilities described above. This important initiative has engaged participants from the UK, mainland Europe and Australia and is the most comprehensive review of coaching and mentoring professional standards and their associated behavioural indicators.

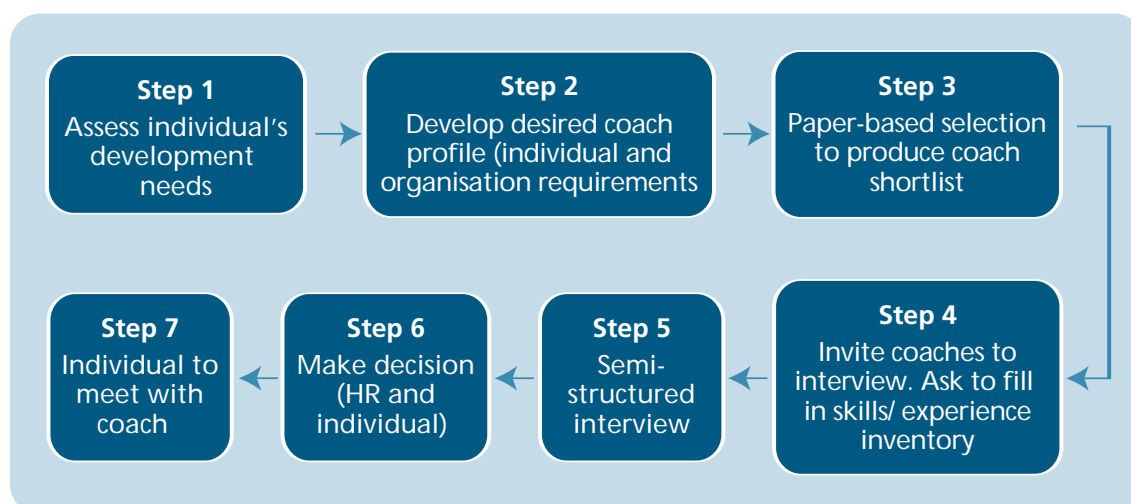
Building on this work, a key output will be the publication of a set of coach and mentor standards. These standards will be an important future resource for organisations in supporting the decisions associated with selecting coaches and mentors as well as the design and evaluation of coach and mentor training programmes. More information about this project can be found on the EMCC website www.emccouncil.org.uk

Part 7 Coach selection and matching

Because of their knowledge and experience of recruitment, HR practitioners are well placed to undertake a thorough coach selection process. Many of the processes used in general recruitment can be adapted to fit the coach-selection process, as the same general principles apply. Nevertheless, you should still take time over the selection process to make sure you find the right match for both the organisation and individual concerned. Even if just a single coach is being hired, it's still worth using a rigorous, carefully thought-out process.

The details of the selection process to be used when recruiting a coach will depend on whether you are seeking to recruit a single coach to work with an individual, or a pool of suitable coaches that you can then 'match' to individuals in the organisation as and when coaching is identified as a suitable development intervention. If you are selecting a coach to work with an individual, the first step will be to look at the particular needs of that individual and draw this into a desired coach profile. An example of a coach selection process in this instance is shown in Figure 17. However, it is important to make sure that the process you adopt will suit the particular needs and culture of your organisation.

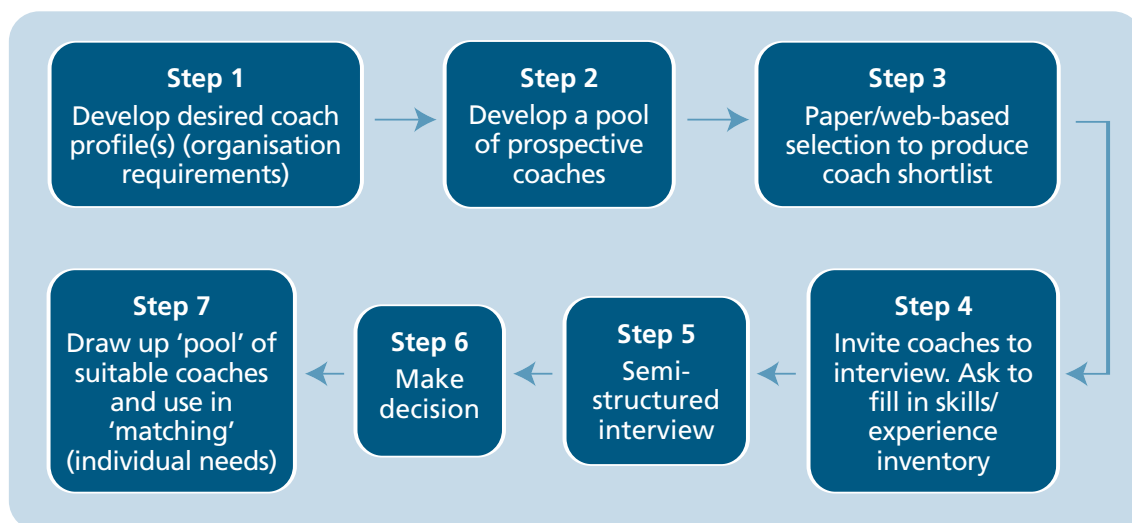
Figure 17: Example of a coach selection process when recruiting a single coach



When an organisation is implementing coaching for a series of individuals in the organisation, it is often sensible for the organisation to identify a number of suitable coaches (a 'pool') who fit the desired requirements of the organisation. This allows the organisation to recruit a series of practitioners who fulfil the organisation's basic requirements, but who may also have different specialisms or approaches to coaching. Developing a pool of coaches in this way also allows the possibility of offering individuals a choice about who

they work with, in the knowledge that all the coaches have been assessed to ensure they fulfil the organisation's criteria. An example of a coach selection process using the pool approach is shown in Figure 18, and more detail on each step follows.

Figure 18: Example of a coach selection process when recruiting a 'pool' of suitable coaches



Step 1: Develop desired coach profile

The first step in the selection process is to spend time drawing up a profile of the coach(es) you are looking to recruit. All of the factors discussed in 'What does the profile of a good external coach look like?', on page 46, should be considered. It's important to make sure that the coach profile is appropriate for the level of the individual and the budget you have. The coach profile form opposite may be useful in thinking through these issues.

Step 2: Develop a pool of prospective coaches

Once you have decided on the profile of the coach, there are several sources you can use to help you find a suitable coach. Many professional coaches are self-employed, although there are some coaching organisations that employ a number of coaches. A good way to find coaches is to contact relevant professional bodies (CIPD, ICF, AC, CPF – see 'Useful sources of information' at the end of the Guide), which can refer you to people who have graduated from their programmes or who are members of their organisation. All of these bodies have code of ethics/conduct so hiring a coach from these organisations will at least help to ensure your coach's professional conduct and standards are of a high level. Another alternative is to simply use word of mouth. Ask colleagues in other organisations for recommendations of coaches who have been effective. Ask prospective coaches to provide you with their CVs and references from previous clients to aid the first step of the selection

process. Another useful source of information is the Coaching and Mentoring Network website where there is a searchable coach referral system (see 'Useful sources of information' at the end of the Guide). Every coach on their system has had their qualifications checked and verified.

Example of a coach profile form

Area	Desired requirements
Previous coaching experience	
Relevant business/industry experience	
References	
Membership of professional bodies	
Qualifications/training	
Relevant experience	
Professional indemnity insurance	
Supervision	
Qualities/personal attributes	
Tools/techniques/models	

Step 3: Paper/web-based selection to produce coach shortlist

There are several levels of selection for coaches. The first round should involve a paper/web-based exercise of looking through the CVs of prospective coaches to identify a shortlist of suitable coaches. They should then be invited for an interview so that you can meet them and ask more questions to determine whether they are the kind of coach you are seeking.

Step 4: Invite coaches to interview. Ask them to fill in skills/experience/qualities inventory

Organisations hiring coaches need to check coaches' references and credentials thoroughly as well as assessing both their coaching skills and industry knowledge. One idea is to use a questionnaire or checklist to get coaches to clarify their style and approach to coaching and provide information about their skills, experience and qualifications (including which assessment instruments they are qualified to use).

Step 5: Interview

The interview should be used to establish how well the candidate matches your desired coach profile, and to explore any particular areas that you would like more information on. The interview can take place face to face or by telephone. Some example questions are provided in Table 9.

Asking the coaches how they would approach a certain situation or problem is another useful technique for gaining a more in-depth understanding of their coaching style and approach. During the interview, you should also discuss with the coaches preferred methods of working. For example, do they deliver coaching face to face, by telephone, by email or a combination of these. Fees, payment, terms, frequency and estimated duration of the coaching sessions should also be discussed.

Beware of coaches who:

- can't explain the model they use
- name individual clients
- can't say what they can do, and what they can't
- don't know who they would not coach
- have no experience in organisational settings (eg only a therapeutic background)
- insist on using their own coaching model, assessment instruments and so forth, instead of using yours or integrating it with theirs
- have only done outplacement work
- take credit for past coaching results – 'I fixed this guy'
- see coaching as a 'power trip'
- use a strictly counselling approach (coaching is not counselling)

Table 9: Questions to ask the coach during the selection process

Area	Possible questions to ask if information has not been gathered from CVs
Previous coaching experience	<ul style="list-style-type: none"> • How long have you worked as a coach? • In what kinds of organisations and industry sectors have you worked? • At what levels in an organisation have you worked? • How many hours of coaching have you delivered? • How many coaching assignments have you delivered? • What kinds of issues/problems have you coached individuals on?
References	<ul style="list-style-type: none"> • Are you able to provide us with references from previous clients?
Membership of professional bodies	<ul style="list-style-type: none"> • Are you a member of any professional bodies? If yes, at what level? • Do you adhere to a code of ethics/conduct as part of your membership of a professional body?
Qualifications/training	<ul style="list-style-type: none"> • What training/qualifications have you undertaken relating to your coaching practice? • Please describe any development activities you have undertaken in the past year as continuing professional development? • Are you qualified to use any psychometric tests?
Relevant experience	<ul style="list-style-type: none"> • Please describe your business experience? • What experience/understanding do you have of the [specific organisation/industry] environment?
Professional indemnity insurance	<ul style="list-style-type: none"> • Do you hold professional indemnity insurance? • If yes, with whom and to what level?
Supervision	<ul style="list-style-type: none"> • How do you maintain your objectivity and perspective during coaching assignments? • What activities do you undertake to keep your skills up to date and ensure you are keeping abreast of professional developments in the field of coaching? • Do you think supervision is important for coaching professionals? What formal supervision arrangements do you currently have in place? • Do you have your own coach or supervisor? What are their credentials?
Establishing the coaching framework/process	<ul style="list-style-type: none"> • How do you suggest we should evaluate the success/impact of the coaching? • Can you describe the theoretical framework you use for the coaching you deliver? • What tools/techniques/models do you like to use?

Step 6: Making your decision

When making your decision, you should go back to the original coach profile you drew up and assess each candidate against it. The decision checklist in Table 10 may help with this process.

Table 10: Decision checklist:

Checklist	Yes/No/ Unsure
• Did the coach have the experience, training and/or qualifications that are relevant to your needs?	
• Is the coach a member of a professional body that has a code of conduct and a complaints procedure?	
• Is the coach able to articulate, simply, the coaching model they use and the process that they typically follow? Is it appropriate to your needs?	
• Is the coach able to provide examples of the impact of previous coaching assignments?	
• Does the coach understand the purpose and boundaries of coaching?	
• Is the coach willing to work with HR and the manager in the coaching engagement?	
• Has the coach undergone formal, independently accredited training?	
• Is the coach able to provide evidence of continuing professional development?	
• What is the coach's background? Are they familiar with how business works? Do they have experience at the right level?	
• Would the coach inspire trust and motivation in the individual?	
• Is the coach's style aligned with organisational culture? Is it too flamboyant or conservative?	
• Are they credible? Would individuals take them seriously?	
• Does the coach have a coaching supervisor? How regularly do they meet?	

Checklist	Yes/No/ Unsure
• Do they demonstrate flexibility in responding to your needs, and the needs of individuals?	
• Do their fees represent value for money and fit in with the agreed budget?	
• Are they available to do the work in your planned timescale?	
• Are they located for easy access to your organisation? If no, is this an issue?	
• Do they broadly fit coach profile you drew up?	
• Are there any areas for concern? Do you need to ask other questions?	

Step 7: Draw up pool of suitable coaches and use in 'matching' (individual needs)

After you have decided which coaches are most suitable for working in your organisation, their details can be drawn up to form a pool of coaches.

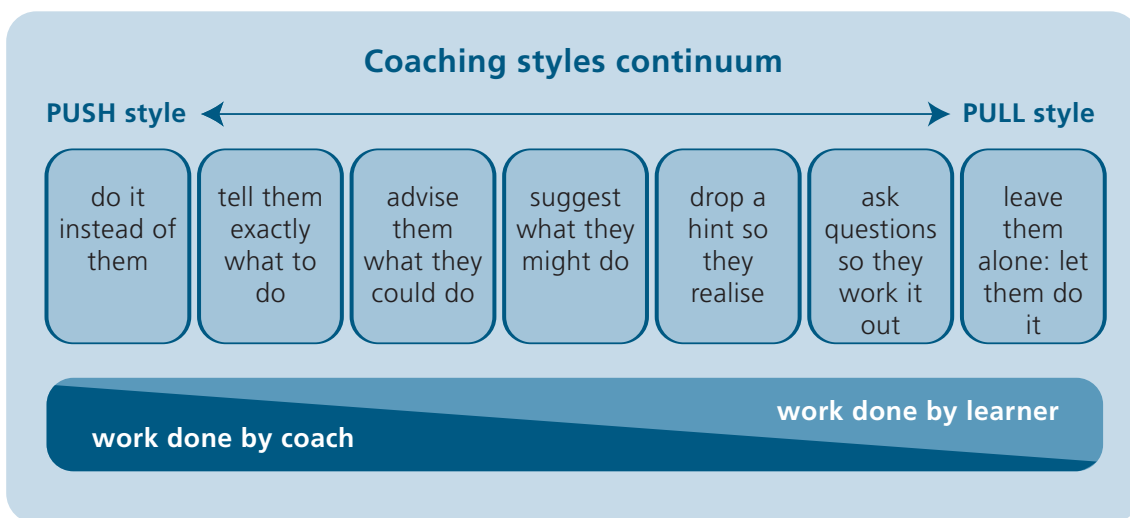
Individual-coach matching

Research has demonstrated that the single most important factor for successful outcomes in one-to-one relationships such as coaching is the quality of the relationship between coach and client. For example, Assay and Lambert (1999) examined the relative importance of key factors in therapeutic relationships and found that the largest contributing factor is the existence of a positive relationship. This is why the 'matching' of individuals to coaches is so critical.

Different individuals will prefer different styles of coaching relationship based on a supportive approach, whereas a few benefit from a rather more confrontational dialogue. Hay (2003) suggests that there is a continuum of coaching styles based on how directive the coach is in working with the individual (Figure 19). This is a very broad model of coaching styles and includes styles used by internal coaches and managers who coach, as well as external coaches. The vast majority of external coaches will work using a style of coaching

that is closer to the 'pull' end of the continuum. Considering an individual's personality and preferred learning style may give an indication of which of these styles may work best.

Figure 19: Continuum of coaching styles



Hall et al (1999) suggests, 'it is an art to match temperament and learning styles for coaches and clients.' HR should use information provided by the individual about their specific development needs and preferred learning styles, alongside information about the coaches' expertise and style to try to make a good 'match'.

The matching process

Via the coach selection process outlined above, a shortlist of coaches who meet the minimum requirements of the organisation will have been identified. Following on, HR must determine appropriate matches between the coach's expertise and the individuals needs. Figure 20 illustrates an example of a matching process.

Having identified the specific needs of the individual, HR should identify two or three coaches who have an appropriate skillset, experience and personality that the individual will find credible and supportive. Information about the coaches can then be passed to the individual for them to choose who they would like to meet. Some larger organisations have developed searchable coach databases that individuals can browse through to select a coach. In this way, HR have established the coach's track record, but allow the individual an element of choice so that the final selection decision can be based on a degree of 'chemistry' between the individual and coach. This will be essential to ensuring the coaching relationship works.

It is important that the individual selects the most appropriate coach for their needs, and not just the one they like the most. To educate the individuals, the kinds of things they should be looking for in a coach need to be explained (see Part 6).

Figure 20: Example of a matching process



Contracting

Establishing a contract for the coaching services is very important as it sets out clearly what services have been agreed for the fees, and what outcomes and deliverables you are entitled to expect. A contract sets the ground rules for the coaching relationship so that both parties know their obligations. It is essential to avoid misunderstandings and provides a firm basis for dealing with any disagreements if any issues arise.

The contract in coaching is often more complicated than those used in counselling/therapy. Normally the goal of coaching is defined in terms of the client's professional life rather than their personal life. As a result, the coaching contract may well include levels of complexity (due to the third party – the organisation) that are not present in a therapeutic contract. Conflicts may concern issues such as objectives for the coaching (individual vs organisation) and confidentiality. These areas need careful and explicit explanation in the contract, particularly when the organisation is providing funding.

The coaching contract represents both its scope and its boundaries and should therefore include:

- the parties to the contract
- how termination by either party will be handled, any alternative arrangement if the coach–individual relationship doesn't work out, for any reason, and what monies will owe if the programme is cancelled at any point
- expected outcomes/deliverables
- etiquette/expected behaviours
- timing, frequency, duration and location of coaching sessions
- confidentiality, feedback and information flow
- use of external resources
- a schedule of payments, with clear indications of when monies are due and precisely what fees include
- arrangements for dealing with additional fees (expenses etc)
- how the work will be controlled and monitored – how regular are reviews?
- criteria for evaluating the results
- if coaching organisations are being used, the coaches providing the services will be identified in the contract and any subsequent changes will take place only in consultation with the client
- agreement on the nature of the coach–client relationship (eg roles, responsibilities, boundaries, timeframes)
- dealing with further requests for business by individuals which should be cleared by HR
- any variations to the contract being discussed in full and agreed in writing.

It is important that the expectations of client and coach are spelled out clearly so that they do not give rise to disappointment or disagreement. The coach should be provided with a copy of the contract for their records.

A more detailed note on confidentiality and information flow

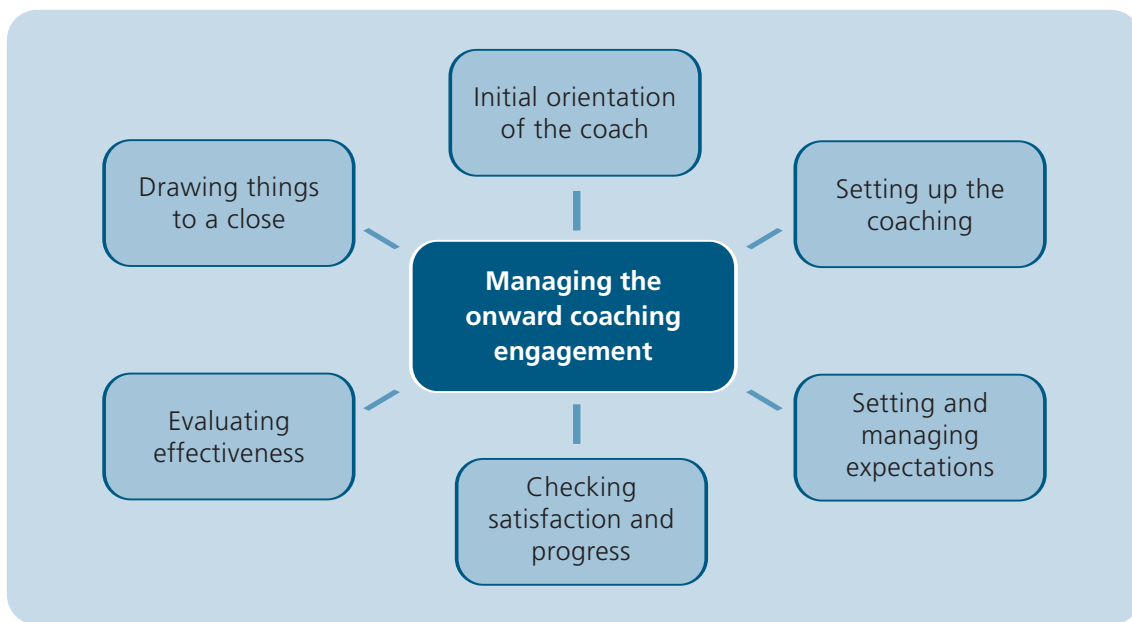
While coaches need to develop trust with the individuals they are working with, HR and top management also need to be kept abreast of progress. Thus, coaches and HR have to come up with some workable agreements about the degree and type of confidentiality they can promise the individuals. The nature and extent of confidentiality should be clarified and explained from the start to all the parties involved in the coaching assignment. Coaches should respect the confidentiality of both the client organisation and the individual and no information from either party should be disclosed without prior agreement. Any circumstances in which confidentiality may be breached should be identified and explained.

Coaches should provide the organisation with regular updates on the progress of services and sufficient information to enable them to monitor the quality and effectiveness of services provided and the satisfaction of individuals with services. Individuals should be made aware of what information is being fed back to the organisation. Individuals can be encouraged to feedback their views about the effectiveness of the coaching as and when they feel ready to do so.

Part 8 Managing the onward coaching engagement

After a coach or coaches have been selected to work with the organisation, there are a number of activities that HR can undertake to build the coach's understanding of the organisation and make the coaching engagement run as smoothly as possible. These areas are illustrated in Figure 21 and are discussed in turn below.

Figure 21: Areas to consider when managing the onward coaching engagement



Initial orientation of the coach

The first step should be to arrange a briefing meeting with the coach(es). It is important that the coach is clear about the objectives and desired outcomes for the coaching, as well as having a good understanding of the broader organisational context. Before the meeting, prepare some background material on your organisation and a detailed brief for the coach. Some of this may have been covered during selection, but it is worth spending time going over it again. During the meeting you could usefully consider covering:

- organisation vision, mission, strategy, values, locations, products, customers, competitors and other important organisational issues
- strategy and context of why you're conducting coaching
- organisational objectives for the coaching initiative or programme
- how it fits into overall HR/training strategy and activities

- the coaching process and model, including the organisation's leadership and competency models
- the outcomes/benefits you expect to achieve
- the estimated timescale for the coaching programme
- clear information about roles and responsibilities (coach/HR)
- evaluation of progress and attainment of goals
- confidentiality arrangements
- administration – time and expense records, notice of cancellation, updates on progress etc
- who will be the company contact person.

If you are providing the coach with any sensitive information about the organisation, make sure they have signed a confidentiality agreement. It may also be useful to have a discussion about how the coach should handle typical coaching dilemmas so that potential problems can be considered and are well thought through.

A confidential session should take place to brief the coach about the initial perceptions of the person's interpersonal strengths and weaknesses. Information from development centres, appraisals and 360-degree feedback exercises can be used to illustrate some of the issues identified.

Setting up the coaching

Many coaching relationships start with a three-way meeting between the coach, line manager and the individual to discuss how the coaching intervention will work. Occasionally, HR may also be involved in this meeting if it's considered helpful. Issues that need to be discussed up front include confidentiality, the reporting of information, the structure of coaching sessions and how the manager and HR will receive information about the effectiveness of the coaching.

There are also logistical topics to be covered. How many sessions will there be? How often should they take place, and how long will they last? Where will they take place? Will they be face to face or by telephone? Will there be any contact between sessions? Average coaching interventions are relatively short-term, lasting between six and eight weeks, but some executive coaching programmes can last for a year or more. The length of the coaching contract will depend on the coaching aims, the individual's specific needs and the breadth of issues to be covered. Myles Downey (1999) suggests the following structure: four sessions, followed by a six-month break, then a check-up session, with the option of reverting to further sessions if the need arises. He suggests that this approach prevents the quasi-counselling pattern of regular fortnightly or weekly sessions running on until the individual wants it to end. It also helps to control costs and reduces the likelihood of the individual becoming dependent on the coach.

The coaching sessions themselves should be frequent enough for momentum on the development plan to be maintained, but should also allow the individual enough time to undertake any agreed activities and to reflect on the previous session. Fortnightly or monthly sessions may be a sensible approach. There are differing opinions about the actual length of a coaching session, but many coaches recommend one to two hours as being appropriate. Janice Caplan (2003) suggests, 'Some points to bear in mind are that coaching can be intense, and an hour might well be as much as a learner can take. There are also some situations where learners need to work in a sustained fashion on issues that require a lot of thinking through, and these may require a longer session. On the other hand, some sessions may be more action-based and the coaching may be shorter.'

There is also the question of how the sessions themselves will be structured. It may be that all the sessions will follow the same format or they will vary according to different needs at different times. The proposed structure of the sessions should be discussed so that the individual can put forward their views on the appropriateness and usefulness of the process used. Although coaches tailor their coaching in different ways depending on the specific individuals' needs, many coaching relationships follow a relatively simple structure. For example:

- setting the initial goals for the proposed coaching intervention
- pre-coaching diagnostic work (eg psychometrics, 360-degree feedback)
- providing feedback to the individual on any diagnostic work
- developing more specific action and learning plans and discussion of a variety of approaches for improving job effectiveness
- regular coaching sessions to implement new approaches and to review progress towards goals
- periodic follow-up and monitoring after the regular coaching sessions have ended.

The individual coaching sessions should have a fairly simple structure that allows flexibility while retaining a consistent approach. An example of some questions to structure the discussion are:

- How do you feel about your progress with the action points from the last session?
- What issues would you like to discuss in this session?
- What would you like to achieve?
- What factors are stopping you?
- What do you need to change to achieve your goal(s)?
- What are your action points to work on before the next session?

After the initial three-way meeting where the broad parameters are discussed and agreed, the coach and the individual should then meet. In their first meeting it will be important to set realistic expectations of the

coaching relationship, discuss any initial concerns, establish trust and define the parameters of the issues to be discussed during the coaching sessions.

Setting and managing expectations

At the outset, it's essential to have an open discussion about expectations to make sure any differences are cleared up early on. The coach is not there to take responsibility away from the individual – they must take responsibility for driving their own learning and development. The role of the coach is to help the individual identify goals/development areas (in line with the organisation's goals for the coaching) and plan appropriate actions to help them build self-awareness and make sustained changes in their behaviour. It's important to establish clear objectives alongside measures to evaluate the success of the coaching intervention. This can be difficult, particularly when the changes involve people's attitudes and behaviour. However, as far as possible the objectives should be SMART:

- specific – so people know exactly what's expected
- measurable – so results can be evaluated
- achievable – within people's capabilities
- realistic – so there is a good chance of success
- timebound – with clear milestones of progress.

If the organisation doesn't have any specific objectives for the coaching – for example, if the coaching is being used to enhance retention or to help people better manage their work–life balance – it's appropriate to let the coach and individual agree an agenda and objectives without input from HR. The line manager however should still be involved.

Checking satisfaction and progress

During the coaching intervention, HR should monitor satisfaction and progress by gaining feedback from the individual, the line manager and the coach. The coach and the organisational representative (HR) should conduct regular updates and briefings, discuss broad areas that surface in the coaching (without breaching agreed confidentiality guidelines) and get a sense of how people are progressing towards their goals. The HR person should also keep the coach abreast of key developments and changes in the organisation that may have an impact on the individual or the coaching intervention.

Near the end of the programme, it will be useful to review progress with those who attended the original meeting. This ensures the evaluation process is started, while allowing the coach to address with the individual any outstanding issues.

Not all coaching relationships work out. This can happen for a variety of reasons and, in these instances, HR need to have a mechanism in place for either party (coach or individual) to come out of the relationship. This process should be covered in the contractual arrangements with the external coach and should be discussed at the initial three-way meeting so that all parties are aware of it. If the coaching is terminated, the individual may choose to select an alternative coach to work with or an alternative development approach may be discussed.

Evaluating effectiveness

Assessment of the tangible benefits of coaching are critical. There should be accountability on the part of the coach, data to prove the value of the initiative for HR and closure on the part of the individual. However, formal evaluation of coaching initiatives is often lacking, with a large proportion of organisations relying on little more than anecdotal evidence to measure effectiveness. This was illustrated in the 2004 CIPD training and development survey, which found that feedback from participants was the most common form of evaluation used in coaching (see Table 11).

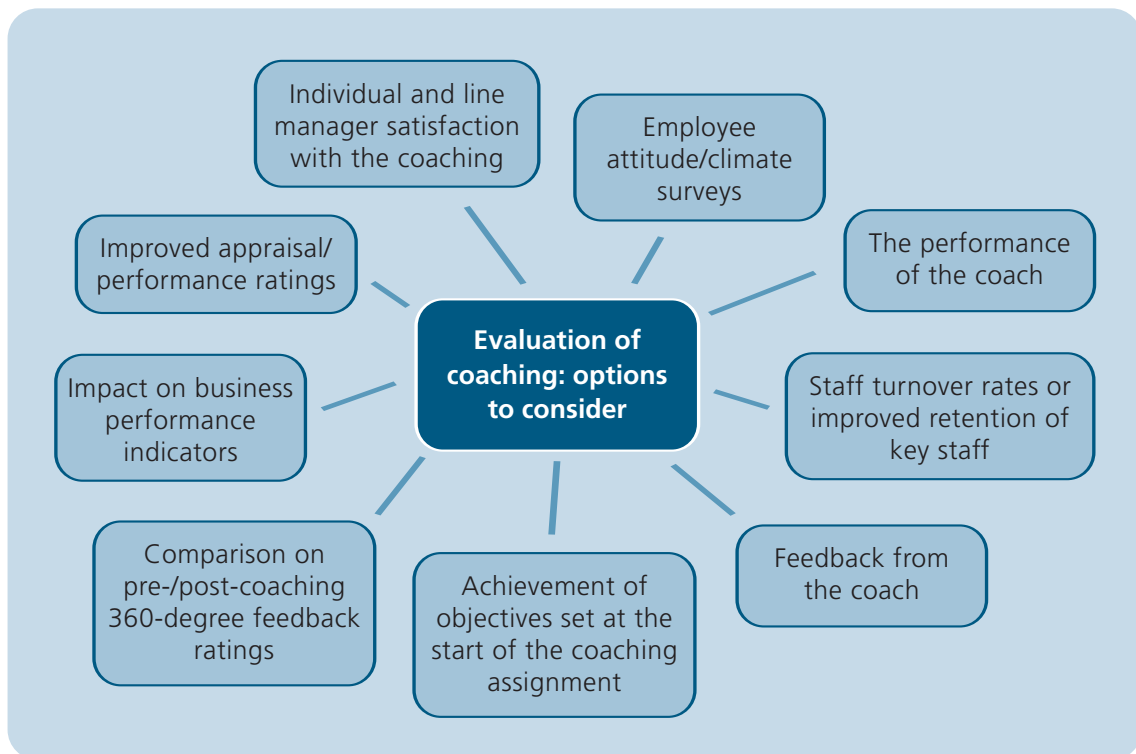
Table 11: Measures used to assess effectiveness of coaching

	% of respondents reporting using this measure
Feedback from participants	75
Appraisal systems	61
Feedback from coaches	44
Employee attitude surveys	41
Exit interviews	38
Assessment against objectives set at the start of a coaching initiative	37
Business performance indicators	29
360° feedback	25
Staff turnover rates	21
Other	6

Before the coaching assignment begins, it's important to plan how you intend to evaluate the coaching. HR should work with the line manager and the coach early on to establish realistic ways of monitoring progress and success. Evaluation should focus on a number of different areas – the performance of the coach, feedback to improve the organisation's management/administration of the coaching processes, the individual's and line manager's satisfaction with the coaching intervention, the degree of behaviour

change/development achieved by the individual and the impact on business results. Establishing the return on investment (ROI) on coaching – as with many other HR activities – is difficult, as it is hard to isolate the impact of a coaching intervention on business indicators such as productivity and turnover. However, it is possible to identify a number of measures that can be used to assess overall effectiveness and satisfaction with the coaching intervention. There is a variety of different options and choices, but which to use will depend on the exact nature of the coaching relationship. These are illustrated in Figure 22.

Figure 22: Evaluating coaching – some options



Feedback from HR, the individual, the line manager and top management are all important when assessing the effectiveness of the coaching intervention. But it's essential to consider the higher-level criteria in line with Kirkpatrick's four-tier model of evaluation (Kirkpatrick 1967). In particular, HR should look at criteria to measure the degree of learning by the individual, the degree of behavioural change and the degree of improvement in business unit effectiveness. Feedback on the coach should also be recorded for use in future matching decisions.

Drawing things to a close

As the coaching assignment draws to a close, the coach should discuss any further development or actions that may be appropriate to continue progress and growth, and to maintain and reinforce any new learned skills or behaviours. The coach also needs to discuss with the individual and the line manager/HR any further development actions that may have been raised during the coaching.

- What other forms of ongoing development can be put in place (eg action learning groups, mentors)?
- How will onward progress continue to be monitored?
- How can the individual continue to receive feedback on their performance/development?
- What other areas for development have been identified?

Once the coaching relationship concludes, HR may follow up with individuals and their managers periodically to assess progress and results. It may be that, at a later stage, further coaching may be appropriate to help the individual fine-tune behaviour and to reinforce the changes they have made.

Summary and conclusions

Coaching has rapidly become a significant part of many organisations' learning and development strategy. However, due to its relatively recent emergence, few HR professionals have in-depth expertise of managing coaching activities, and in particular selecting and supervising external coaches. So, many practitioners are struggling with a variety of issues that are preventing them from gaining full value from their current coaching activities. Among the challenges reported are confusion around the terminology in use, a lack of agreement about what a good coach looks like, engaging different stakeholders in coaching relationships, drawing up contractual arrangements and evaluating the impact of activities. All of these are significant challenges for HR professionals, as they work to draw up a framework to ensure value for money and alignment with the organisation's strategic goals.

The coaching industry itself is at a critical stage. Future success is likely to be determined by the quality and professionalism of coaches and their ability to deliver demonstrable value to their clients. This is now being taken seriously and both suppliers and buyers are pushing for greater professionalism, quality standards and more ethical practice. On the demand side, organisations are becoming more sophisticated about their use of coaching services. Evidence of the effectiveness of coaching interventions is being sought and more questions are being asked about accountability and what returns are being seen. HR practitioners must continue to exert pressure in terms of minimum expected standards, qualifications and outcomes, so that practitioners who operate unethically are weeded out and the potential benefits of coaching interventions are realised.

Hopefully this Guide provides CIPD members with advice and guidance to help them navigate through the complex coaching marketplace, by demystifying many of the concepts and terminology in use and providing clear advice and guidance on some of the processes. We have tried not to set out a single 'best practice' set of processes, but rather discussed the options and offered some suggestions of ways to think through the issues. The challenge for HR is to take forward some of these ideas and adapt them to fit their organisation's culture and strategy, so that they have an informed, tailored and proactive approach to selecting coaches and managing coaching activities effectively.

Appendix

Comparison of the different coaching professional bodies

	International Coach Federation (ICF)	Association for Coaching (AC)	European Mentoring and Coaching Council (EMCC)	Coaching Psychology Forum (CPF)
Date established	1992	July 2002	1991 as EMC, re-constituted in October 2002	May 2002
Description	ICF's mission is to be 'the global forum for the art and science of coaching, where we inspire transformational conversations, advocate excellence, and expand awareness of the contribution coaching is to the future of humankind'. As the international professional association of personal and business coaches the ICF seeks to preserve the integrity of coaching around the globe.	The AC is an independent and non-profit organisation which aims to operate as an ethical and responsible association of members, and to advance the professionalism of coaching across the industry. Their vision is to be the leading membership association for professional coaches and organisations involved in coaching and related training across all disciplines to enable individuals and businesses to develop, expand and achieve their goals.	The EMCC is an independent, unifying and inclusive body covering a broad spectrum of corporate, voluntary and community organisations plus academic and professional training and development qualifications and accrediting bodies in both the coaching and mentoring communities. EMCC aims to draw together those involved in the activity and profession of coaching and mentoring and it works to promote both the adoption of, and the expectation of, good practice and high standards in coaching and mentoring providers/customers across Europe.	The Coaching Psychology Forum (CPF) aims to: <ul style="list-style-type: none"> • support the setting up of a Special Group in Coaching Psychology within the BPS • promote the academic and professional development of coaching psychology, and encourage its research and study • promote the development of appropriate ethical standards and guidelines for the practice of coaching psychology • encourage the development of coaching psychology by facilitating workshops, conferences and publications.
Proportion of business/life coaches in membership	The approximate split in ICF membership is 60% corporate/executive coaches and 40% career/personal/life coaches.	50-50. The split incorporates executives, business, speciality (eg health, leadership), life/personal and group coaching	Members offer a broad range of services related to coaching and mentoring, but the majority are focused on business-work-related issues.	Members come from a wide range of coaching and psychology backgrounds, but all are interested in coaching practices based on sound psychological theory and principles.
Size of membership	6,500 members over 33 countries, with approximately 600 members in the UK.	350-400 members (eg individual and organisational members).	36 organisations and 200 individual members. Discussions are ongoing with groups in several European countries.	400 members.
Typical profile of members	All members operate within the coaching industry but have diverse backgrounds.	Individual members are experienced coaches from a wide span of backgrounds and professional disciplines – eg consultancy, HR/training, psychology, education etc. Organisational members include training providers, coaching companies and large corporate organisations.	Organisational members include corporate organisations, coaching providers, professional, academic and qualification bodies. Individual members include experienced and less experienced coaches as well as trainers and supervisors of coaches.	The CPF consists of members or affiliate subscribers of the BPS who may be: <ul style="list-style-type: none"> • interested or involved in coaching and coaching psychology • undertaking research into coaching practice. • want to promote improved coaching practice.
Complaints procedure	The ICF has a formal complaint procedure in place that provides for review, investigation and response to alleged unethical practices or behaviour deviating from the established ICF Ethical Guidelines.	Yes.	There is a complaints procedure associated with the ethics policy.	The BPS has a full, complaints procedure associated with its Code of Conduct. This covers all members of the CPF. Over 50% of members of CPF are BPS Chartered Psychologists.
Code of ethics/conduct	The ICF has its own Standards of Ethical Conduct, which members must pledge to adhere to as part of their membership.	Yes.	The EMCC has a code of ethics, a diversity policy and guidelines on professional supervision.	As all members of the group are members of the BPS, all members must adhere to the BPS Code of Conduct. Ethical principles and guidelines for psychologists accompany the BPS Code of Conduct.

	International Coach Federation (ICF)	Association for Coaching (AC)	European Mentoring and Coaching Council (EMCC)	Coaching Psychology Forum (CPF)
What does membership entail	Membership entails being part of a large, international, independent body with a commitment to high, ethical standards.	Full membership of the AC allows members to state that they are a member of a professional coaching body with a code of ethics, complaints procedure and agreed standards. To become a member all applicants go through a vetting process, including reference checking and verification of qualifications.	Membership of the EMCC allows members to contribute towards the creation of a European coaching and mentoring profession, governed by a widely agreed code of ethics and standards of competence and professional supervision.	The CPF is a professional community of practice.
Coaching standards	The ICF has coaching standards as part of its Standards of Ethical Conduct. These standards cover issues around confidentiality, conflict of interest, professional conduct with clients and professional conduct at large.	Yes.	The EMCC is leading a collaborative project to produce agreed coaching and mentoring standards of competencies for all typologies with associated definitions.	Contributing to the EMCC project on coaching standards.
Membership restrictions	There are no membership restrictions – anyone who operates in the coaching industry can join. By becoming a member you are agreeing to adhere to the ICF's Standards of Ethical Conduct.	Yes. Affiliates are not entitled to use the AC's mark, letters by their name or entry into the AC online directory (see grades below).	Currently there are no restrictions on membership as long as there is agreement to support the vision and aims of EMCC and abide by the code of ethics and associated guidelines on diversity and supervision.	Members must be a minimum of a graduate member of the BPS. Affiliate members must be an affiliate subscriber of the BPS. Non-members can still attend CPF events/workshops, but will pay a slightly higher fee.
Membership fees	The annual membership subscription is £105 (GBP). Additional fees are charged for credentialing.	Per annum: Individuals Affiliate £25 + £5 (one-off registration fee) Associate £45 + £10 (one-off registration fee) Member £55 + £15 (one-off registration fee) Fellow £75 (by invitation only by the council) Organisations £150 + £25 (one-off registration fee) Combined organisation/ member £170 + £25 (one-off registration fee)	Individual membership is £100 per annum. Organisational membership is £300 (includes three individual memberships). Membership for training providers is £1,000 (includes five individual memberships).	Membership: Free Workshops and conferences are offered to CPF members at reduced rates. Members are also offered reduced rates.
Qualifications	There are three levels of ICF credentials: 1. Associate certified coach (ACC) – this is an introductory qualification for coaches. Coaches must have received 60 hours coach training and have delivered 250 hours' paid client coaching. 2. Professional certified coach (PCC) – achieved when a coach has received 125 hours' training and has delivered 750 hours' paid client coaching. 3. Master certified coach (MCC) – achieved when a coach has received 200 hours' training and has delivered 2,500 hours' paid client coaching. An ICF credential only lasts for three years and then has to be renewed – at this point CPD must be demonstrated.	Yes.	Many EMCC member organisations offer a range of accredited qualification programmes.	Full Members of CPF have a minimum of a recognised degree that provides Graduate Basis of Registration (GBR) with the BPS. For CPF members to describe themselves as Coaching Psychologists, they must have GBR plus relevant training and CPD.

	International Coach Federation (ICF)	Association for Coaching (AC)	European Mentoring and Coaching Council (EMCC)	Coaching Psychology Forum (CPF)
Runs conferences and events	The ICF holds an annual international conference as well as regional events in different continents. At a local, country level, the ICF holds monthly events on key issues/topics. Members of the ICF receive a reduced rate for all events/conferences.	Yes. The first international conference is being held in October 2004. The AC also runs monthly CPD/training events, quarterly development forums, organisational breakfast talks and members' co-coaching forums.	The EMCC has run an annual two-day conference each autumn for the past 11 years as well as other events during the year.	Conference and events are run throughout the year on coaching psychology and related coaching topics.
Provides a register or directory of coaches	ICF have an online register of member coaches. Coaches with different levels of credentials are on the register to allow selection of coaches with appropriate experience for the specific need.	Yes. This can be found on the AC website under 'online directory' and is updated monthly.	This is currently under review.	There is an online register of members – this register is limited to member coaches who are BPS Chartered Psychologists.
Accredits course and qualifications	The ICF accredits coach training programmes of different length. Currently there are four organisations that offer accredited training programmes in the UK. The ICF also provides certification for one-off events.	Yes. At the moment the AC only recognises individual trainers but plan to move to accrediting courses and also individual coaches. An individual coach accreditation scheme is being launched in 2004.	The EMCC does not aim to be an accrediting body for individuals but to establish agreed ethical and professional standards of competence as the basis for all accredited academic and professional practice and development programmes across Europe.	No.
Provides information/resources	Information and resources can be found on the ICF website, including research papers, articles and information about the coaching profession.	Yes. Via website, online forum, regular updates to members and a new series of information sheets on good practice. The AC also provides information to the public on topical subjects as well as research.	The EMCC currently provides members with a newsletter and an e-journal (academic/practitioner research). An online resource centre (articles/research etc) is currently being developed.	A series of articles on coaching psychology topics are offered on the website, as well as an online journal. There is also an online discussion group that members can use to network/gain information from their peers.
Provides training courses	No, this would be in conflict with the training schools that apply for ICF accreditation for their programmes, and would compromise the independence of ICF credentialing.	No. The AC does not believe that a professional body should engage in training as this may cause a conflict of interests or at least a tension.	No, but some EMCC training provider members do offer coach training courses.	No. The CPF only provides CPD workshops, seminars and conferences.
Runs CPD workshops	Yes, events are run at a local, country level. Attending these events could be considered to be evidence of CPD.	Yes. The AC requires members to undertake 30 hours of CPD per annum.	CPD certificates can be requested by members attending EMCC events or conferences.	All workshops/events/conferences run by the CPF are considered to fulfil CPD requirements. CPD certificates are given out to all attendees at these events.
Monitoring of CPD	CPD is monitored as part of the re-accreditation process of ICF credentials.	Yes. Via their renewal applications.	There is not a mandatory requirement for members to undertake CPD, but the code of ethics does state a need for members to keep up to date with current thinking and practice.	The members who are BPS Chartered Psychologists are required to undertake CPD.
Supervision	Coaches have to receive supervision during training for any of the ICF credentials. The ICF strongly recommends that all coaches should be supervised as part of ongoing good practice.	The AC recognises the value of supervision as one of the tools used to assist in terms of quality control and coach support. The AC encourages members to take up supervision although there is no absolute requirement.	The EMCC code of ethics requires member coaches to be undertaking supervision. Further guidance and a statement about supervision has been agreed.	All members of the BPS who are in training as a psychologist should be in supervision. All Chartered Counselling Psychologists must continue to be supervised while practising; however, other groups of psychologists do not have such rigorous requirements. The CPF recommends supervision to all coaching psychologists.

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Useful sources of information

Professional coaching bodies (non-profit, independent)

Association for Coaching

66 Church Road, London W7 1LB
Tel: +44 (0)20 7389 0746
Email: enquiries@associationforcoaching.com
Website: www.associationforcoaching.com

European Mentoring and Coaching Council

Sherwood House, 7 Oxhey Road, Watford WD19 4QF
Tel: +44 (0)70 0023 4683
Email: info@emccouncil.org
Website: www.emccouncil.org

Coaching Psychology Forum (CPF)

156 Westcombe Hill, London SE3 7DH
Tel: +44 (0)20 8293 4114
Email: info@coachingpsychologyforum.org.uk
Website: www.coachingpsychologyforum.org.uk

International Coach Federation

PO Box 2872, Tipton, DY4 0YW
Tel: +44 (0)87 0751 8823
Email: info@coachfederation.org.uk
Website: www.coachfederation.org

Coaching-related organisations

Association of Business Psychologists

211/212 Piccadilly, London W1J 9HG
Tel: +44 (0)20 7917 1733
Email: admin@theabp.org
Website: www.theabp.org

British Psychological Society

St Andrews House, 48 Princess Road East, Leicester LE17DR
Tel: +44 (0)11 6254 9568
Email: enquiry@bps.org.uk
Website: www.bps.org.uk

Association of Career Professionals International

World Headquarters, 204 E Street NE, Washington DC 20002, United States of America
Tel: 1-202-547-6377
Email: info@acpinternational.org
Website: www.acpinternational.org

Chartered Institute of Personnel and Development (CIPD)

CIPD House, Camp Road, London SW19 4UX
Tel: +44 (0)20 8971 9000
Email: training.hotline@cipd.co.uk
Website: www.cipd.co.uk

Association for Professional Executive Coaching and Supervision (APECS)

Tel: +44 (0)20 8746 2157 or +44 (0)14 9163 8941
Email: info@apecs.uk.com

Coaching and Mentoring Network

PO Box 5551, Newbury, Berkshire, RG20 7WB
Tel: +44 (0)87 0733 3313
Email: annabg@coachingnetwork.org.uk
Website: www.coachingnetwork.org.uk

International Centre of the Study of Coaching (ICSC), Middlesex University

Tel: +44 (0)20 7794 7142
 Email: masterypractice@aol.com
 Website: www.icscoaching.org

International Stress Management Association

PO Box 348, Waltham Cross EN8 8ZL
 Tel: +44 (0)70 0078 0430
 Email: stress@isma.org.uk
 Website: www.isma.org.uk

National Mentoring Network

First Floor, Charles House, Albert Street, Eccles M30 0PW
 Tel: +44 (0)16 1787 8600
 Email: enquiries@nmn.org.uk
 Website: www.nmn.org.uk

Worldwide Association of Business Coaches

c/o WABC Coaches Inc, 8578 Echo Place West,
 Sidney BC V8L 5E2, Canada
 Email: membersupport@wabccoaches.com
 Website: www.wabccoaches.com

Organisations offering coaching qualifications/training courses**AAA coaching partners**

Tel: +44 (0)61 75591 2403
 E-mail: michelle@aaa-coaching-partners.com
 Website: www.aaa-coaching-partners.com

Academy of Executive Coaching

62 Paul St, London EC2A 4NA
 Tel: +44 (0)17 2786 4806
 Email: info@academyofexecutivecoaching.com
 Website: www.academyofexecutivecoaching.com

Centre for Coaching

156 Westcombe Hill, London SE3 7DH
 Tel: +44 (0)20 8293 4334
 Email: admin@centreforcoaching.com
 Website: www.centreforcoaching.com

Chartered Institute of Personnel and Development (CIPD)

CIPD House, Camp Road, London SW19 4UX
 Tel: +44 (0)20 8263 3434
 Email: training.hotline@cipd.co.uk
 Website: www.cipd.co.uk/train

City University

Northampton Square, London EC1V 0HB
 Tel: +44 (0)20 7040 8268
 Email: conted@city.ac.uk
 Website: www.city.ac.uk/conted

Clutterbuck Associates

Burnham House, High Street, Burnham,
 Buckinghamshire SL1 7JZ
 Tel: +44 (0)16 2866 1667
 Email: info@clutterbuckassociates.co.uk
 Website: www.clutterbuckassociates.co.uk

Coach Training Alliance

2245 Eagles Nest Drive, Lafayette, CO 80026, United States of America
 Tel: 303-464-0110
 Email: ideas@CoachTrainingAlliance.com
 Website: www.coachtrainingalliance.com

Coaching at Work – CIPD coaching courses and qualifications

The CIPD leads the development and promotion of good practice in the field of personnel, training and development and this is reflected in the new portfolio Coaching at Work.

The Coaching at Work portfolio offers practical certificate programmes, short courses and publications that enable individuals to achieve their full potential in the coaching arena.

Advanced Certificate of Coaching and Mentoring

Certificate in Coaching and Mentoring

The Certificate and the Advanced Certificate have been developed by the CIPD in association with the Oxford School of Coaching and Mentoring. Both programmes provide understanding of theory and practice using a blended style of face-to-face, distance and online learning methods.

Shorter courses

A selection of two-day training courses offer more in-depth practical skills training. These include:

Coaching for Organisational Success

Takes a strategic view of coaching and mentoring and is an opportunity for HR, training and development practitioners to work as strategic business partners with their line colleagues.

Team Coaching

Identifies how team coaching differs from individual coaching, enabling participants to develop the knowledge, skills and qualities to be an effective team coach.

The Manager as Coach

Focuses primarily on helping participants develop their skills as coaches. In the process, participants will be developing their skills and confidence to adopt a more 'hands off' approach to their work.

Coaching using NLP

NLP enables coaches to appreciate situations from different perspectives, releasing the true potential of the individual.

Career Coaching

Defines the career-coaching process. It combines knowledge and understanding of key strategies for dealing with a range of issues in career management.

Psychology of Coaching

Provides managers and coaches with a range of psychological tools that will help to identify how they habitually think, feel and behave can act as barriers to achieving their own and organisational goals.

Executive Coaching

Designed for senior executives who wish to learn more about executive coaching and the business benefits of implementing a coaching programme for their organisation.

The Supervision of Coaches

Develops the skills of supervising coaches, enabling them to supervise other practising coaches.

NB Attendance at a two-day programme with reflection notes gives exemption to one of the knowledge modules on the Advanced Certificate.

All of these programmes may be held on an in-company basis and tailored to meet your organisation's requirements. For further information, please see the CIPD website (www.cipd.co.uk/train) or call +44 (0)20 8263 3434.

Coach Training Institute

Headquarters: 1879 Second Street, San Rafael,
CA 94901

Tel: +44 (0)23 8029 3212

Email: info@co-activecoaching.co.uk

Website: www.thecoaches.com

Coach U Europe

Paraid House, Unit 4, Bond St, West Bromwich, West
Midlands B70 7DQ

Tel: +44 (0)80 0085 4317

Email: info@coacheurope.com

Website: www.coachueurope.com

Coaching Futures

37 Grays Inn Road, London SW1X 9PQ

Tel: +44 (0)20 7242 4030

Email: info@managmentfutures.co.uk

Website: www.coachingfutures.co.uk

College of Executive Coaching

Wolverhampton Science Park, Wolverhampton, West
Midlands WV10 9RU

Tel: +44 (0)87 0756 7555

Email: info@coec.co.uk

Website: www.coec.co.uk

Corporate Coach U

PO Box 881595, Steamboat Springs, CO, 80488-
1595, USA

Tel: 1-719-227-1333

Email: admissions@coaching.com

Website: www.ccui.com

Duncan MacQuarrie Limited

84 Brook Street, Mayfair, London W1K 5EH

Tel: +44 (0)87 0751 8822

Email: Elizabeth@DuncanMacQuarrie.com

Website: www.DuncanMacQuarrie.com

European Coaching Foundation

23 Blackwell Business Park, Blackwell, Shipston-on-
Stour, Warwickshire CV36 4PE

Tel: +44 (0)87 0010 6270

Email: info@europeancoachingfoundation.co.uk

Website: www.europeancoachingfoundation.co.uk

i-coach academy

Tel: +44 (0)20 8788 0216

Email: caroline@i-coachacademy.com

Website: www.i-coachacademy.com

Newcastle College

FREEPOST NT920, Scotswood Road,
Newcastle-upon-Tyne NE4 5BR

Tel: +44 (0)19 1200 4000

Email: enquiries@ncl-coll.ac.uk

Website: www.ncl-coll.ac.uk

Newfield Network Inc

Tel: 301 570 6680

Email: coachinfo@newfieldnetwork.com

Website: www.newfieldnetwork.com

Oxford Executive Coaching

19 Norham Road, Oxford OX2 6SF

Tel: +44 (0)18 6531 0320

Email: bebrilliant@oexec.co.uk

Website: www.oexec.co.uk

Oxford Brookes University

Headington Campus, Gypsy Lane, Oxford OX3 0BP

Tel: +44 (0)18 6548 8350

Email: ecox@brookes.ac.uk

Website: www.brookes.ac.uk/schools/education/macoachment.html

The Oxford School of Coaching and Mentoring

Centrepoint, Chapel Square, Deddington,

Oxfordshire OX15 0SG

Tel: +44 (0)18 6933 8989

Email: kay@oscm.co.uk

Website: www.oscm.co.uk

Penna Consulting

55 Gracechurch St, London EC3V 0EF

Tel: +44 (0)20 7933 8333

Email: corporate@e-penna.com

Website: www.e-penna.com

Performance Consultants (in conjunction with

University of Portsmouth Business School)

Southfield, Leigh, Kent, TN11 8PJ

Telephone: +44 (0)1732 457700

Fax: +44 (0)1732 741700

E-mail: enquire@performanceconsultants.co.uk

Website: www.performanceconsultants.co.uk

Peter Bluckert Coaching (in conjunction with Leeds

Metropolitan University or Dublin Institute of

Technology, Ireland)

Old Gate House, 9 Wingfield Court, Bingley, West

Yorkshire BD16 4TE

Tel: +44 (0)12 7456 6060

Email: mail@pbcoaching.com

Website: www.pbcoaching.com

School of Coaching

3 Carlton House Terrace, London SW1Y 5DG

Tel: +44 (0)20 7004 7151

Email: jackiewrout@theschoolofcoaching.com

Website: www.theschoolofcoaching.com

Sheffield Hallam University

Postgraduate Office Room 7301, School of Business

and Finance, Stoddart Building, City Campus,

Howard St, Sheffield S1 1WB

Tel: +44 (0)11 4225 2820

Email: sbf@shu.ac.uk

Website: www.shu.ac.uk

The Coaching Academy

20 Landport Terrace, Southsea, Hampshire PO1 2RG

Tel: 0800 783 4823

Fax: +44 (0)23 9286 1584

Email: info@the-coaching-academy.com

Website: www.lifecoachingacademy.com

UK College of Life Coaching

Science Park, Stafford Rd, Wolverhampton, West

Midlands WV10 9RU

Tel: +44 (0)87 0756 7444

Email: enquiries@ukclc.net

Website: www.ukclc.net

Wolverhampton University

The Postgraduate and Professional Office, University

of Wolverhampton, Compton Park Campus,

Compton Road West, Wolverhampton WV3 9DX

Tel: +44 (0)19 0232 1081

Email: uwbs-graduate@wlv.ac.uk

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The CIPD explores leading-edge people management and development issues at a strategic level. Our aim is to share knowledge to increase learning and understanding to improve practice. We produce surveys, think-piece Change Agendas and introductory Factsheets and Topics for Trainers that all are available to download from our website.

