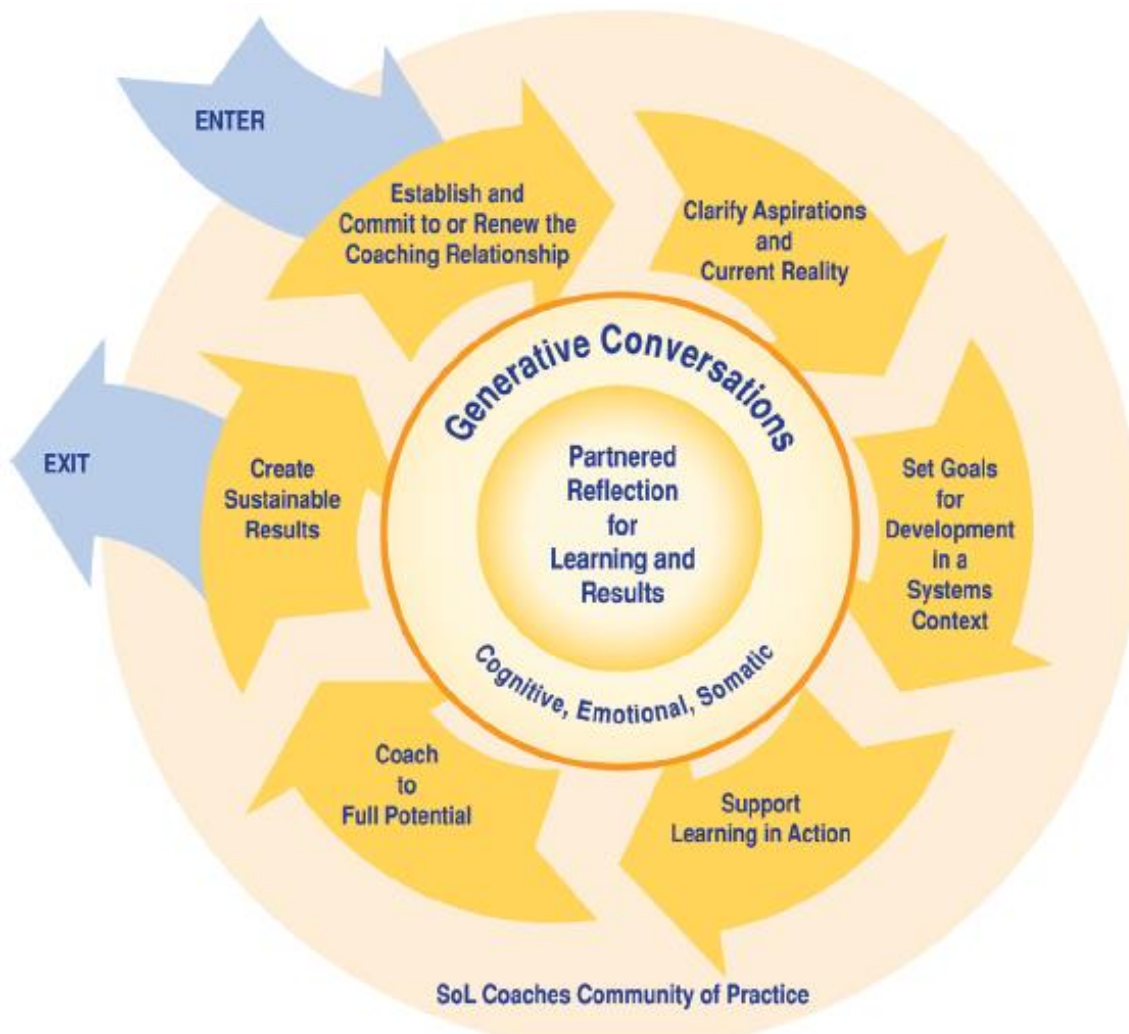


# An Overview of the Executive Coaching Process

CatherineHormats.com

## Visual Representation of the Coaching Process:



Source: Gestalt Institute of Cleveland

## Steps in the Coaching Process:

### DESIGN the Coaching Plan: *Creating Awareness and Planning*

1. **Initial Meetings** with Coach and Leader. Agendas include:
  - Leader's view of coaching objectives
  - Alignment validation between Leader's and Manager's coaching expectations and goals
  - Confidentiality, roles, process, timelines, assessments, measurement, etc.
  - Intake interview including career history, current team and organization
  - Validation of Business Value Chain and outcomes
  - Key stakeholders and 360° feedback raters identified
  
2. **Alignment** Meeting with Coach, Leader, Manager, and HR
  - Manager(s) and Leader provide each other with candid feedback
  - Business Value Chain, coaching goals, desired outcomes and metrics confirmed
  - Key stakeholders' roles in Leader's development confirmed
  - Mutual commitment to development openly acknowledged
  
3. **Assessment and Debrief**
  - Existing and/or new assessment data analyzed by Coach.
  - Stakeholders' perception of Leader's development goals obtained and commitment to Leader's development secured
  - Coach and Leader debrief comprehensive assessment interpretation
  - Leader's strengths and development opportunities are identified (through self- and 360-assessments)
  
4. **Development Plan**
  - Leader prepares initial draft of development plan
  - Coach prepares Leader for development plan discussion with Manager
  - Alignment Meeting (Leader, Manager, HR and Coach) to review development plan
  - Development plan finalized by Leader

### ACCELERATE Performance: *Achieving and Measuring Success*

5. **Coach to Plan**
  - One-on-one coaching meetings between Coach and Leader facilitated for learning and goal achievement (check progress on development, create awareness, provide insight, challenge the Leader, stretch the Leader, ask for commitments, provide assignments, etc.)
  
6. **Evaluate & Measure**
  - Measure and evaluate success as agreed upon at beginning of engagement
  - Coach provides recommendations for sustained and continued development
  - Leader and Manager complete Right Management's online final evaluation
  - Conduct final Alignment Meeting (Leader, Manager, HR and Coach)
  - Coach and Leader close out engagement

## The Goal-Setting Process:

Goal-setting often is one of the most challenging parts of a coaching engagement. Finding goals that are both attainable and aspirational can take time. Sometimes we simply begin by taking stock of what is, and the goals become evident as the process emerges. It's not uncommon to spend the first few weeks or months brainstorming possibilities for goals and narrowing them down over time. In other cases, goals may emerge early on in the process. Furthermore, some goals are very tactical or concrete (salary increase; job promotion), while others are more strategic or nebulous (becoming more self-aware; staying grounded when giving a large speech).

Setting goals is an evolutionary process. And it's a process, not an event. No goal is ever set in stone and unaltered. Through the coaching process, we want to make space for goals to be continually be revised, refined, and redefined. In our experience, the more time that is spent exploring and honing the goals initially, the more likely they are to be achieved. Below is one framework we use when considering what are goals that fit within the bounds of executive coaching:



Credit: Patricia Matasta

## And Finally...Boundaries, Boundaries, Boundaries

Coaching is a process that often involves deep, transformational change—both for an organization and for its leader(s). In order for change to occur, both the coach and client have to be able to bring their full selves to the process. Having well-established boundaries allows for greater trust and safety in the coaching relationship. As such, here are a few guidelines we practice:

- **Confidentiality:** The information shared between client and coach is considered sacrosanct. It is completely confidential. The client owns and has full discretion over what to do with the information he or she discloses during the coaching process. As required by law, exceptions to confidentiality are made when the client shares information that may put himself or someone else in danger.
- **Coaching vs. Therapy:** Coaching and therapy differ in several key respects. While the coaching experience may be therapeutic in nature, it is important to note that coaching is not a form of psychotherapy.
  - **Conscious Thoughts and Experiences:** Coaching mostly pertains to processing conscious thoughts, memories, experiences, and feelings. Psychotherapy is centered around processing the unconscious.
  - **Past vs. Future Experiences:** Coaching mainly pertains to present and future-centered experiences, while therapy often pertains to past (transferential) experiences. That's not to say that coaching does not address things from our past that recur in the present. It is just to say that we spend less time unpacking what happened in the past and more time understanding what is and applying it to the future.
  - **Level of System:** Coaching often involves intrapersonal, interpersonal, and organizational awareness and change. Therapy mainly involves intrapsychic awareness and change. Coaching can be more outwardly-focused and organizationally-driven, while therapy is often more individually-focused.
  - **Nature of Topics Discussed:** Coaching often pertains to the executive functioning of the brain. These include work-related challenges and systemic and organizational issues. In coaching, we focus more on the self in relation to one's purpose, direction, goals, and organizational experiences. Therapy often pertains to the relationship between parts of the self and earlier versions of the self.

I do my best to be very clear about the above boundaries so that our clients have full choice and awareness of what a coaching engagement involves. We are always available to answer any questions you have.

## **In Conclusion**

Congratulations on choosing to invest in yourself and your organization through executive coaching! If done in a way that envisions your future goals and objectives while honoring exactly where you are in the process right now, it can bring about many wonderful, new, and exciting changes in your life. Coaching can help reveal many new ways of working with, motivating, leading, and relating to others, especially in the workplace. Change can also evoke ambivalent or even conflictual feelings. Coaching often involves reconciling paradoxes and polarities. It can elucidate a vision for your future self and define a new path for your organization and the way you lead it. I believe in change, and I believe in you!