Executive Coaches Share Openly During ICF Annual Conference Panel Discussion

Joan O. Wright, MCC
Also contributing: Linda Miller, MCC-Panel Moderator, and Panelists William Bergquist, Bob Johnson, Mary Beth O’Neill, Jeannine Sandstrom, MCC, Val Williams, MCC and Klaus Zepuntke

This article first appeared in the International Journal of Coaching in Organizations, 2004, 2(4), 13-27. It can only be reprinted and distributed with prior written permission from Professional Coaching Publications, Inc. (PCPI). Email John Lazar at john@ijco.info for such permission.

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The field of executive coaching continues to emerge as practitioners strive to support executives aimed at enhancing their current and future leadership effectiveness. This article represents the collective and diverse viewpoints, models and personal standards from a group of highly regarded executive coaches from North America and Europe. Whether you are a new executive coach or a seasoned expert, our hope is that you will be enriched by the fact that there is no one “right” model or no one “right” approach. In addition to the expertise shared, we want you to learn from these valuable stories that only come from hands-on experience with executives from a variety of global corporate and organizational settings. We think these stories will pique your own discovery and challenge you to reach for an even greater level of leadership and excellence in service to your clients and the coaching community at large.

Prologue
As an enthusiastic steward of the executive coaching profession I was elated when given the opportunity to design and manage an interactive panel discussion for the 8th ICF Annual Conference in Denver, Colorado. I began by contacting some of the finest executive coaches in the world and requesting their participation. As expected, each of the seven executive coaches I contacted eagerly agreed to participate. Six would serve as panelists and one as a panel moderator for a session entitled “Credible Executive Coaches Modeling Executive Coaching.”

The team faithfully met monthly to share ideas and points of view. New collegial connections and friendships were born out of these meetings. The outpouring of ideas during this time gave me confidence that this panel session was going to be truly exceptional. I was absolutely correct as several hundred coaches in attendance witnessed two and one half hours of stimulating, thought provoking interaction that offered countless benefits for new and seasoned executive coaches alike.

Perhaps most impressive was the way these seven seasoned professionals with a combination of more than 140 years of executive coaching experience willingly shared their strategic and tactical thinking, challenged each other respectfully and modeled the role of executive coach in a most credible way. The panel was so well received, I’m pleased to report that plans call for a similar activity at the ICF 9th Annual Conference in Quebec City. We again plan to submit an article series to this publication summarizing the panelist outputs. Thank you to the “super seven panelists.”

I am confident you will find the following summary useful in the ongoing development of your career. While many of our panelists have authored numerous books and articles on our subject, we have purposely left the text in a very conversational tone. If you were there, we want you to recall the spirit of the panel dialog and if you were not in attendance, you will certainly appreci-
ate the talent, diversity of thought, humor and personality of each executive coach.

Introduction
In November of 2003, a group of seven executive coaches representing the United States, Canada and Europe participated in a panel session that was part of the educational track offered during the 8th ICF Annual Conference at The Adam’s Mark Hotel in Denver, Colorado. The objective for the panel was to provide an interactive learning and sharing environment for executive coaches who work with senior-level executives with fiduciary responsibility to multiple stakeholders.

The 150-minute panel session consisted of three distinct parts. The first segment involved the delivery of prepared questions by the moderator. The panelists responded with their viewpoints and typically shared methods and modus operandi that contributed to successful outcomes in real world coaching. This article is devoted to sharing some of these gems of executive coaching wisdom, thereby encouraging excellence in our profession.

The second part of the panel event involved six group breakouts sorted by specific topics and facilitated by the six panelists. Topics included:

- Dynamic tension with training and credentialing issues.
- The distinctions of an excellent executive coach.
- The cost of executives and their organizations being coached by people not meeting high standards of excellence.
- How excellent executive coaches coach.
- Models for organizations dealing with things like confidentiality, coaching in isolation, implementing organizational coaching and how to form a team of executive coaches.
- The future of executive coaching.

The third and final part of the panel activity was a Q&A session where panelists reassembled and proceeded to respond to questions posed by members of the audience. During this time, attendees were able to garner expert feedback on areas of the executive coaching discipline they deemed most significant.

To fully appreciate the breadth of experience and geographic diversity represented by the distinguished moderator and panel here is brief biography of each of these outstanding executive coaches:

- **Linda Miller, MCC** served as panel moderator. Next year, Linda will celebrate a decade of achievement in executive and organizational coaching. After many years of operating her own business, the Arizona resident joined the senior team with The Ken Blanchard Companies in 2000. For two years she was Director of Coaching Services. Currently, Linda serves as their Corporate Alliance Executive.

- **William Bergquist, Ph.D.** has served as president of The Professional School of Psychology and as a consultant, coach and trainer of consultants and coaches throughout the world. He is the author of 36 books concerned with personal, organizational and societal transitions and serves as Co-Executive Editor of *The International Journal of Coaching in Organizations*.

- **Bob Johnson**, from Calgary, Alberta, Canada, has been coaching CEOs and senior executives since 1983. He is the founder of Leader Search, Inc., a Calgary based group of leadership coaches and search professionals. Bob’s philosophy is that there is a right person for every corporate culture and a right culture for every person.
Mary Beth O’Neill, M.A., is a leadership consultant, executive coach and author who resides in Washington. She is the leader of the Executive Coaching Training Seminars. Her book, Executive Coaching with Backbone and Heart, is one of Amazon.com’s best-selling executive coaching texts. She has been an organizational consultant for 20 years and executive coach for 16 years.

Dr. Jeannie Sandstrom, CEO of CoachWorks® International, has been a business owner and international leader coach since 1979. A Texas resident, Dr. Sandstrom is co-author of numerous leadership and coaching books, articles and tapes. Her broad industry diversification allows her to coach effectively in virtually every area of business.

Val Williams, MCC, has been an executive coach for the past eight years, specializing in coaching senior corporate executives and their teams. A New Yorker, Val has extensive experience in the healthcare industry and has authored several executive coaching books and audiotapes including “Get The Best Out of Your People and Yourself.”

Klaus Zepuntke, is from Hamburg, Germany. Klaus is an independent executive and corporate coach with international experience in a variety of industries including banking, energy services, manufacturing, communications and health care. His special areas of interest and expertise are dealing with resistance to change, conflict management, value oriented leadership and executive team development. Klaus has over thirteen years of experience in the field of leadership and executive coaching.

Here now is a summary of the first segment of the panel discussion. It is structured in a simple Q&A format so you are able to identify each individual response by panelist. Captured are the good natured humor, high intellect and wealth of experience that is part and parcel of this group.

A Bit of Panelist Personality

Moderator (Linda): If you were not an executive coach, what would you be doing instead?

Jeannine: I’ve thought about that a lot. I think I would be a high-wire performer or a trapeze artist in Ringling Brothers circus. And, really, is it any different than being an executive coach?

Mary Beth: For me it would be some kind of architect. Since I’m a gardener I could be a landscape architect. Or perhaps I would be a community builder. Maybe I would combine the two and be a community-building architect.

Bob: I tried to convince myself that what I would want to do is to prove that what we preach all the time works. So, I would be the CEO of an organization and have a position of power so I could actually make the coaching culture be part of my organizational culture. But that sounds like a tough job, so I probably wouldn’t do it. I think I would be a monk on a motorcycle.

Bill: I have the privilege of being the oldest one on the panel so I am already thinking about what I am going to do next. I have published several songs, which is a joy, and I’ve started on two musicals.

Klaus: Either I would run a bookstore combined with a café or I would be a writer at a house by the sea. I’d probably be starving by now.
Val: If I were not a coach, there’s no question I’d want to be Cher or Tina Turner. The only detail is that I can’t sing!

**The Issue of Confidentiality**

Moderator (Linda): How do you handle confidentiality?

Val: I haven’t had much of a problem with confidentiality. I was an executive myself for 13 years so I’m pretty practical in how I approach coaching. Initially, I meet with the manager of the client and the client. In that first meeting, before we do anything else, we go over the goals. I ask the manager to give feedback to the client in front of me. What I then say to the manager is that I will not meet with him/her again without the client present. I also ask not to be called without the client present. That has worked really well. So, we have one three-way conversation, and then anything about the content of coaching is confidential. I do update the company on the process, but only with the client present. For example, I might share our four goals, and how we will measure progress on them. We’ll talk about the progress, not the content. I leave it to the client to share what they want to share. For eight years it has worked well.

Bob: I agree with Val except the first part. We’re very clear that the client is the organization. The coachee is the benefactor of the process and we make that clear to both the organization and the coachee. With each individual leader that we coach, there is a mini 360 that we do. We gather the feedback and then put together a plan with the individual leader. Then we sit down with the individual leader’s boss and have a triangle conversation, the same way Val does. We say that there will be updates on progress, which are three-way conversations. We also do organizational observations. We can identify common themes coming from multiple leaders being coached. We bring those organizational themes to the sponsor or the organization. This is different from individual development conversations that take place between the coaches and the coach. We don’t discuss these.

Mary Beth: I basically agree with my esteemed colleagues and I’m going to steal Val’s idea about having the client in the room all the time. I have not done that—I really like this idea. What I’ve done is to set up a norm that every time the boss asks me “How’s Jim doing?” I tell the boss, “Every time you ask me that I’m going to say ‘Jim’s doing fine,’ no matter how Jim is doing.” This query usually indicates that the boss is trying to get out of his or her own responsibility for monitoring Jim’s performance. That allows me to do what I call “guerilla coaching” of the boss. I might say, “Are you concerned and wondering how Jim’s doing? I would be happy to have some conversations about how you can monitor how Jim is doing if that would be useful.” So, we start with coaching moments and end with a coaching contract with the boss as well as one with Jim.

**What Executives are Discussing With Their Coaches**

Moderator (Linda): What are the current themes that you find executives discussing during coaching?

Jeannine: “My team is not performing well” is the most common theme. A discussion must be pointed toward the fact that it is their direct responsibility that their team is not performing well. It typically moves to a discussion about performance and team interaction. It often requires a focus on the challenge of growing their successors.
Bill: Many of us desperately hope that what we’re addressing are puzzles. Puzzles have nice tidy answers, and we know when we’ve solved them. I think that most coaching is not about puzzles but rather about complex problems or mysteries that are multidisciplinary, often nested and filled with dilemmas. I find that when people bring me in, they want me to help them solve a puzzle. Normally during the coaching process we get involved in things much deeper in terms of problems that have both internal controls and things that are out of their control. I help sort those two out.

Klaus: The coaching issue that I see continuously coming up is the need for improvement of communication in general from a broad level into the organization. I am repeatedly dealing with this critical issue.

Executive Coaching Themes

Moderator (Linda): Are there themes that emerge as you are coaching?

Val: My personal favorite theme, even though clients never come to coaching for this, is authenticity — how can they be real. My basic twenty-second coaching goes like this. The client says, “Val, you know my people aren’t doing xyz and it’s a problem.” I say, “Have you told them?” My client responds, “Well, no,” and I state that I think that is the real problem. You’ve got to be direct with these people. That is where the real coaching begins.

Bill: I find that the higher up people are in an organization, the more difficult it is to receive the feedback they get and to trust that feedback. Also, the feedback tends to come from many sources. I find typically what I’m doing is helping people to understand and trust the feedback they are getting and to determine how they can use it to improve their own performance.

Mary Beth: I’ve been joking for about 20 years that we have job security, because I’m still talking to leaders about really basic stuff like for example, getting clear agreements and telling your teams what decision making style you’re using. Is it majority vote? Is it autocratic? Is it consultative? It’s amazing how many leaders say, “Yeah, yeah, I know that,” but they don’t do it. Another theme is leaders who constantly misdiagnose the lack of role clarity when they see their direct reports fighting. They think it’s an interpersonal conflict when it’s actually that the leader has not been clear about the lines of demarcation between the two roles. I expect this to be obvious stuff, but it’s still going on, and we have job security because of it.

Jeannine: There is a subset of what Mary Beth just said that I find as a theme. It is that decisions are commonly changed in the hallway directly after a meeting. That’s where people lobby and bring more data back to the CEO, asking for a reversal of the decision. This is a very complex and interesting theme that I see almost constantly.

Bob: I would say the number one theme I see is trust in the organization. We get countless executives that say, “The survey says that the number one issue in our organization is trust, so how do we get them to trust us.”

About Client Expectations

Moderator (Linda): What do you find your clients expect from their executive coaching experience?

Mary Beth: This is a real obvious one to me. I keep hearing over and over again how lonely leaders are and that they need frank feedback from us. When we are not
intimidated by their executive presence and we’re willing to tell them “the real facts of life” they are grateful for the truth. Even if they balk at first and even if they get irritated, I find that they are always so grateful for it.

**Klaus:** I think they definitely expect a certain amount of frankness from us. They want us to be very straight with them and not play any games or be someone else in front of their subordinates. To convey a consistent mirror image that is not a contradiction is vitally important. I treat them with deep respect and build trust. Also, I try to always be clear. I think success in coaching depends on absolute clarity on our part as coaches.

**Val:** I would definitely echo Klaus’ thought. What my clients seem to appreciate most is the push back. I specialize in strategy development and my clients come to expect the push back. You’ve got to be able to say, “I don’t see how that’s going to work — walk me through how that’s going to work. How do you think people are going to react to that?” So that would be one client expectation — the push back. Another one that has surprised me over the years is that clients want a place where they can admit their weaknesses, their vulnerabilities and their limitations in a safe way where it’s not evaluative, because there is no place else to discuss such topics. If they can admit it with a coach, they can work on it, but it’s got to be in a safe place. I actually have had a very high level person say to me, “I’m concerned that I’m stupid.” Now who are they going to say that to? With a trusted executive coach they can say it and get it off their chest. Do I then respond, “Why no, I think you’re smart?” No. I say, “Tell me, why do you think you’re stupid?” You can have a very frank conversation without the client getting upset about it.

**Bill:** What strikes me is the role of sanctuaries, which is what I think we’re talking about here. I think in a complex postmodern world there are not many safe places for people who have to make difficult decisions — executives. And what is interesting is that coaching is a place where we can promote forgiveness and understanding. The whole issue of learning from our mistakes is lovely, but one of the first things we have to do is to say, “I made a mistake, and I’m really feeling lousy about it. Somewhere along the line I have to forgive myself.” Hearing a coach say, “Yes, that’s understandable with what you’ve just been through,” can help executives move forward.

**Jeannine:** There’s an interesting client expectation that is based around learning — it’s being able to admit that you don’t know or haven’t been updated about a major issue in your field. Occasionally, we’ll actually get into a learning program. What I can point them to in their own industry or their field is leadership. They need to be students of leadership, and many leaders haven’t done that. They’ve been so busy leading, they don’t know the distinction of being a role-model or being able to mentor through a succession plan. So it’s a valuable education and learning time.

**The Executive as a Customer**

**Moderator (Linda):** What do we know about the executive as a customer? What is the need and why would they consider executive coaching?

**Bob:** I think many times the executive doesn’t want to be the customer. They want the organization, or their other leaders to be the customer. Mary Beth talked about how she makes sure that they actually do become the customer at some point. And that may be the way that we need to enter the organization: to work with their leaders and to report to them so that they can be involved in the process. They need to make the commitment that
minimally they will sponsor the process and will take the time to report activities, which can turn into a coaching relationship. What I also see is that they need succession-planning coaching. They’re all of a sudden starting to realize that they don’t have their replacements ready. And they are looking to coaches to help them identify their successors and to provide coaching for their successors as well.

Jeannine: Their expectations are high. They got to their level in the organization by being very good at what they do, and they’re expecting that of us — high professionalism, trust, directness, knowledge, skills. What I would add to this as what they need is often around their own life balance. Thinking about the company’s stage or their own stage of their career, they need to be thinking about taking time for themselves. Obviously, it won’t come out that way. It will come out as they point out “the thirteen additional things I’ve got to do and find time for.” They seek help sorting through how they can cram it all in. The conversation really becomes interesting when you can ask, “So, how can you run this marathon? How many more years before you make bad mistakes? What decisions in the past year have you made that you wish now you’d spent more time in?” This leads to a results conversation, addressing the effectiveness of their decisions, which loops back to the personal part of how are they taking care of themselves to ensure the executive machine is able to function as well as it needs to everyday.

Val: I’ve noticed three things about executives as customers in large corporations. First, they want to know that practical results will come through the coaching. Your value as a coach has to show up in their daily jobs, in their performance evaluation, in their P&Ls. The second thing is that our partnership as a vendor, seller, partner, whatever you want to call it, needs to be clear and crisp. Because executives are busy, they don’t have a lot of time. You’ve got to get straight to the point. The last thing I would say, and I really like this, is that they’re expecting a worthy opponent. They want somebody that they can rock and roll with, which makes them respect you. So, as much as I say corporate executives are tough, we also need to be tough. We are coaches.

Klaus: Whenever I have the initial conversation with a client, I find out who they are. Is it an executive in his or her role as an executive or is it an individual hiding behind the role? I not only work on the executive level, but I also work on various other levels in the same organization either on a coaching level or I’m facilitating leadership programs. Everything I do within the organization enables me to gain knowledge about the organization from different perspectives. I then have a better source, and I can bring different questions into the coaching situation. In addition to the client who comes up with the topics or with the issues, I can say, “OK, there’s this or that rumor in the organization, or I heard xyz. How do you relate to that and how does that relate to what we have talked about earlier?” So working on different levels in the organization has helped me to not just have the top executive view, because that can often be a pretty isolated view.

Bill: One final comment about knowing the customer. I recall a model of change that was first presented by Kurt Lewin. According to Lewin, we need to realize that there are certain experiences that are unfreezing. There is dissonance, things that don’t fit. There are mistakes. There are failures. And random events occur that essentially unfreeze us. In a postmodern world I think executives are faced with many experiences that unfreeze them. However, Lewin pointed out that this isn’t learning. The unfreezing is simply setting the conditions
for learning. And I think, as an executive coach, I’m working with someone who’s been unfrozen. That is, something has hit them and they’re trying to figure out what happened. It’s a learning process. Yes, they’ve been very busy, and they have no time, but something has hit them and they are suddenly asking, “What just happened that’s made my world not the same anymore?” That’s why linking the learning to 360s or training programs or strategic planning processes often is effective. There’s an unfreezing that’s occurred, and the executive needs help with the next phase, including refreezing.

Male versus Female

Moderator (Linda): Are there any differences in the way you coach male or female leaders? If so, what are they?

Val: Tricky question. Male verses female. I don’t want to sound sexist so I’m going to make an observation from my personal practice. I’m not saying this is about all women or all men, but I react to this question by saying that I coach senior executives who are about 60 percent male and 40 percent female. That is just how it is. The one thing I tend to coach women executives on more than men is that they often ask for permission to get in the game. They’re qualified. They have the skills, but it’s not about that. They’re still holding back. One of my favorite questions for female clients is, “Are you going to be a player or are you going to be a pawn? Which is it?” I have to push really hard because there’s not going to be an engraved invitation to play. I’m surprised that at this point, with so much progress for women, that this struggle is still there and that they’re waiting for permission. That is one difference in the sexes I’ve seen.

Bill: A majority of the people in this room are women. In executive coaching, the majority of people who do executive coaching are women. The majority of the people being coached are men. So one of the interesting things about our profession is the fact that females are more often than not coaching male executives. I’ve given a number of speeches over the years, and the one that has generated the most attention is one I did in Los Angeles several years ago on the subject of gender—the relationship of male coaches to female clients or colleagues, as we call them, and vice versa. I think it’s a critical point that for women who are coaching men, often the male executive wishes that his significant other could be like his female coach. I see this again and again. They say, “I wish my wife could listen to me the way my coach does.” That’s so profoundly unfair to the wife because she’s involved in the issue. Because of this, many of the women coaches I work with ask to meet with the man’s significant other, at least once, so she recognizes that this is not a threat. This is an important issue: the dynamic between the male executive and the female coach and it needs to be discussed.

Mary Beth: I find that when bosses want to get a coach for their male direct reports, they are kind of frustrated that these people don’t take more initiative when the opportunity arises. They seem to want more direction. Whereas the female direct reports of leaders seem to take a lot of initiative but they’re not good at setting boundaries—they take on way too many things. And then they don’t have an executive presence because they’re running around trying to be all things to all people. They can easily become burned out and used up because they’re taking on too many things. This is a distinction I’ve found in my work.

Bob: One of the biggest challenges for the male executives is how they have to shift when it’s time for women to come into the boy’s club. This brings up very significant coaching needs, so they can clearly understand how to
Jeannine: Female executives who have grown up with a really rough male model present interesting challenges. Some have gone far beyond their own original tendencies in order to play the game. They have become tougher and meaner than their male colleagues. It’s hard for them to be in the game on a level playing field. This is where I have run into the most interesting and complex dynamics. I lived in a male world as an only child who grew up in my father’s business, and so for many years I had no concept of this kind of a distinction. I would walk into briar patches without realizing I was in one. It’s actually served me well because the expectation is that I’m coming in as a human being working with another human being. That served me well until I was actually working in Europe and Asia, some 10-15 years ago, where I had to quickly take a completely different stance of honoring that culture. I look at this dynamic now as someone who is bilingual both in culture and diversity beyond the male or the female agenda.

Val: I’m happy to hear Klaus say that. I would like to transition to longer sessions myself. I’m still in a traditional model. I coach executives in 40 to 60-minute sessions because it seems like I attract people that demand brief coaching exposures. I do a lot of laser coaching, and clients often have only an hour at a time to give me. So I’m still coaching an hour once every two weeks or an hour a few times a month if it’s an individual. I’ll spend more time with groups of executives.

Bob: Typically, we are on-site as well as coaching by telephone. We tell our executives to plan on 90 minutes for onsite coaching, and we usually like to leave some additional time in case it stretches out. Telephone coaching sessions are for 45 minutes and we initially set up the coaching on a once-a-week basis. We find, on average, one of the sessions every month cancels out for whatever reason, so we average three times a month. The initial commitment for coaching is for six months.

Bill: I represent the other extreme. I would rarely work for less than two hours at a time. Recently I have been doing something quite different and I invite you to try it. I’m fortunate to live on the Atlantic Ocean in the state of Maine. It is a beautiful area in which to live and there’s a lovely inn right near my home. A few months ago, a client asked if he could come to Maine in order to work with me. We did it, and now I’m doing it more often. They come to Maine and stay at the inn for three days. I coach them for two hours, and then they go out for several hours to write and work. Sometimes they’re sitting on the rocks down by the ocean or walking on the beach. Then they come back and we coach for another two hours. We do that over a period of three days and it’s been amazing. These are executives who are very busy and they have absolutely no time to do anything like
this. Yet, they’re all saying “sure I’ll come up for three
days.” I think it has something to do with sanctuaries
that we talked about earlier. We engage in six coaching
sessions over three days. The people I coach do an
enormous amount of work between each of these
sessions. I still haven’t figured out what it is but it seems
to be miraculous — and it allows me to stay home!

Klaus: Listening to what you just said, Bill, reminds me
of what I sometimes do. I go with my clients for a walk.
When you ask top executives to go with you for a walk,
they give you a strange look. First, what’s that about?
This is business. It has to be in an office behind a desk or
at a table. We have the best conversations when we go
for walks. When the body is moving, the thoughts are
moving. I tried this a few times last year, and it worked.
Since then, I have done it more often and have received
very positive feedback from the clients. If you try this, be
prepared for the initial resistance. Just try it. Go for
walks.

When is it Time to Conclude?

Moderator (Linda): How do you know when it’s time to
conclude your coaching with a client?

Jeannine: There’s an internal measure that I use to get
to this question of when to end. I need to be eager to see
a client and anxious to know the progress they’ve made
or what they’re dealing with. So, my first calibration is
with me. Then I would go back to the contract — our
agreements, what are our goals — how close are we to
them? But I also look for a sabbatical. Some of our clients
are one year or two year commitments. And there may
be a rhythm that actually includes a time out. We may
be working on something very intense and it’s time for
them to let it rest for a bit. If we let the relationship rest
for a bit, we establish a commitment of when we’re going
to pick it up, review where we are and move forward.
The three dynamics that I’m looking for are 1) myself, 2)
our stated goal and 3) the rhythm and timing. The one
caveat I add to this, given everybody’s international
schedules and how complex things are, is if I’ve not
connected with an executive within six weeks then I
will do my best to track them down and be proactive
about reconnecting. So much happens between sessions
and the time out can either be a rhythm of learning and
practicing or its disengagement. So, it you take time
outs, be sure to monitor them.

Val: I think Jeannine said that perfectly. I think most of
us do that. What I’ll speak to is the other side of the
question. When do you fire a client? Luckily I’ve had to
fire less than five clients over the eight years, but I have
done it. It was not easy, and what I use as an indicator
for firing is if the client is not taking action. If we’ve
agreed on things, and the client is making commitments
to action, and we’ve talked about what’s in the way,
and they still don’t take action, I would call that, to use
Jeannine’s word, disengagement. Now I’m not talking
about when a client is blocked and we’re working on
the blocks I’m talking about not taking action. That’s the
indicator. Another indicator is scheduling. I watch the
scheduling pretty closely. How often does a client cancel,
or reschedule? I’ve sometimes fired clients for that.
Before I do, I ask if they think that coaching is the right
thing for them right now. The hardest client to fire is the
one I have felt I’m not being effective with — that’s the
hard one. This is the client who’s there and who’s willing
to pay the fee. But I know that I’m not a match or that I
don’t have the skill set to be effective. I have told them
the truth about that and let go. And that’s hard on my
ego. I have to remember that I’m not the coach for
everybody. 99 percent of the people, but not everybody!

Klaus: I fire a client when there’s absolutely no
commitment, and I definitely give this input to the client. And being a feeling-type person, when I just have the feeling we came to the end of the road—it’s a dead end road—the client cannot benefit from me as a coach anymore then I put that on the table. Usually I’m right, and he or she has the same feeling. I have a basic rule in the coaching contract with the client that we can both fire one another, but before we do that, I want us to meet at least one more time to talk, to be in the role of devil’s advocate and to get closure. They may be hurt, although it’s not our intention to hurt them. Sometimes when we talk, we decide to continue, or we mutually decide to stop.

Measuring Coaching ROI

Moderator (Linda): How do you measure return on investment [ROI] for your work with a corporate client or your work with an executive?

Mary Beth: This is one of my favorite topics. I track three things that I call the three factors for leader effectiveness. The three factors are 1) What is the business result and what are the measures? 2) What are very specific leader behaviors that they have to exhibit that they’re not exhibiting now? 3) What are team interaction skills that they need from their team to produce those results? I ask the leader to identify the variables in their business, inside and outside, that are going to impact their results and their success. They say everything from, “You know the economy was going down from the year 2000 and we’ve been really struggling with that” to “We just lost ten percent of our market share.” So we identify the variables, then at the end we cycle back, look at the three factors and look at the variables again. Since coaching is one of the variables, I’m tracking my percentage of impact by asking what percentage of impact was the coaching variable as opposed to the other variables on getting the ROI. It’s a subjective answer from the leader who I have found is always giving a high percentage and it’s my job to be more hard-nosed and business-oriented about this than they are. I’m always skeptical about it and I’m always knocking down the percentage and saying, “There were other variables, so prove to me that the coaching percentage is accurate.” Over time what I have found is a typical percentage of impact from coaching once they truly consider all of the variables is anywhere from 20 to 33 percent.

Bob: When I sit down with an executive and they ask how we’re going to measure this, what I ask them to do is to identify the key issues they have in their organization that they want to see shift. Whenever they identify those issues I’ll ask, “How do you measure them?” They typically tell me, “I can’t.” So I say, “OK, we’ve got to figure out a way to measure this.” One of the ways we do that quite often is to identify the key things that they just listed. Then we review them using a one to ten scale. I ask the executive “If one is as poor as it could ever be and ten for this indicator walks on water, where do you think you are as an individual or an organization right now.” The executive picks a number. Then I might ask, “At the end of six months, if we were to measure success, what would be a number that you would pick?” And we lay that out as the connector for what we measure. So set it up in the beginning, take a look at it along the way, and measure it in the end. Make sure that they’re the ones who are identifying the key indicators and they are also picking the starting point number.

Bill: I think we’re allowed some differences, right? So I want to push a difference here and be critical of ROI. When I look at executive coaching, I think of the executive not as a position in the organization but as a function
that is served in the organization. It involves making decisions under conditions of complexity, unpredictability and turbulence. This is different from performance coaching which is about influencing actual behavior. Part of the problem with ROI is that it tends to move us toward performance coaching. It is much easier to measure changes in behavior and the impact in behavior. I think it’s much harder to measure the impact of shifts in decision-making processes. It is possible, but it tends to require much longer-term measurements.

Secondly, as I have already noted I think that often what we deal with in coaching are not puzzles but problems. Puzzles are easily measurable, because they are framed in a single, unitary discipline. Problems, on the other hand, are messy, multidisciplinary, dilemma-filled, nested and even paradoxical. The resolution of these problems is very hard to measure. What I fear with many ROI models is they push us into puzzles, when in fact what we want (and need) to do as coaches is address problems. Finally, something that Mary Beth said is very important: most problems are a mixture of things we have control over and things that we don’t have any control over. So, any measurements we do, if we ever do a measurement, must be sensitive to those things that are impacting on the outcomes other than the coaching process.

Val: I totally agree with everything that’s been said. I would add that the ROI conversation is one that I would not separate from coaching itself. What I found very useful is that as a coach, you can educate people to think that way while you’re coaching, all the time, so we don’t even have to wait for the evaluation day or the update day. For example, I was coaching a group last week. We were doing group coaching with ten managers together. My homework assignment to them the week before had been to do something during the week that demonstrated the five particular skills that we were working on. They did that, but then my question when we debriefed was, “What did you do and tell me about the impact?” I asked the same questions to each person. “What was the business result? How would you relate this to your bottom line?” I just asked them the questions as a way to start educating the client to look at ROI all the time. This is another way to think about ROI in addition to the more formal measurement.

Some Sage Advice

 Moderator (Linda): What advice would you give to experienced coaches?

 Val: OK, I’ll start. My advice would be that whether you’re experienced or whether you’re new, decide to be a player. Get a vision of what is it you want for corporate America, not just what you want in terms of a client. What do you want? I’m talking about executive coaching for corporations. What do you want to see for corporations? There are some really practical reasons to do this. First, it will organize your marketing effort. If you want to build a practice, you can market around a message. Secondly, it’ll move you out of the position of begging to be hired to the position of having something really valuable to offer. This moves you into a situation where you are an equal partner with an executive and capable of assisting in some real and positive changes in the world. So that’s my advice: be a player, be bold, have a vision.

 Klaus: I suggest everyone identify their core values because they keep you grounded. I feel this is important. You must also speak your mind all the time without exception. Don’t be shy. What personally has helped me along on the executive level is having a natural disrespect for hierarchical positions. They simply don’t
Bill: Coaching is a new alternative form of human service. It is evolving and being invented right now. So my advice to you, especially for those of you who have been in the field, is to be servants to this field, to help out, to help us make this into something that is viable. I don’t know if you’re aware of the fact that my colleagues up here on the table are quite remarkable men and women. And why in the world are they here? Why is Linda here moderating and why are the people here like Joan Wright who organized this track? In *The International Journal of Coaching in Organizations* our colleagues are writing pieces about the history of executive coaching and where it’s going from here. They are actively making the effort to be contributors to this field. That is, they are not simply thinking about their own individual practices, but about how they can contribute to this field in a variety of ways. You must do the same thing. I invite you to join in and help make this into a major field that we can all be proud of now and years from now. The message is clear: we all need to get involved and help advance our profession.

Bob: I have two practical pieces of advice. First, align, align and align. Stop coaching in isolation. There’s a self-fulfilling prophecy when we work in isolation and many coaches seem to work in isolation. Instead, get together with everybody else to engage in opportunities for our own growth and therefore the growth of those organizations we work in. Second, stop entering organizations with what I call the “fix it” coaching mentality. That’s the greatest opportunity because the world out there typically says that if somebody needs to be fixed, get them a coach. Then we take that opportunity because we want to grow our practice. We go in and we brand coaching as a fix. And we brand ourselves as “fix it” practitioners. The natural result is that when there’s more fix it to be done they look to coaches for help. However, when there’s great growth to be realized they don’t look to us or even consider us a viable resources. So it’s time to end fix it coaching as the way that we enter organizations.

Mary Beth: My advice is work hard to break polarized thinking, both your clients’ and your own. I see it over and over again - human beings under stress tend to polarize. This is a symptom. I urge you to consciously work at avoiding this trap. It is my pet peeve. Leaders are constantly polarizing and splitting. They say, “If I give parameters to my team, they won’t take initiative.” But the team is thinking that unless we get the parameters, we don’t know what initiative to take. Obviously, the more the leader gives parameters, the better. A typical polarization trap I see is this whole thing about ROI versus focusing on the people dimension. By all means, this does not have to generate polarized thinking. What is truer is that you can figure ROI and focus on interpersonal skills.

Jeannine: The advice I would give to experienced coaches and those entering and growing their practice is to know your craft. Be grounded in a coaching model and methodology and what underpins it. That will help you set your boundaries. That will help you know what clients you are best suited for and aid you in knowing when to exit a client system. In addition to knowing your craft, be bold.

Topics of Interest

Moderator (Linda): Would each panelist now briefly comment on the topic you addressed during the breakout
Jeannine: My topic concerns the differences in coaching—the different kinds of coaching and the distinctions of excellent executive coaches. We need to be able to move in many audiences and perhaps many locations, many countries and appreciate the subtle differences. At this time you are probably saying to yourself, “Yeah, of course.” But beyond this line of distinction I put coaching differences in three buckets. The first is executive presence. The second is business acumen. And the third is coaching competencies at the senior level. Each one of these has as many different secondary points, and together they create distinct variances in the way we talk and work with colleagues.

Mary Beth: My topic is best practices of executive coaches. To me, executive coaching is not personal coaching in the workplace. The development of the leader is necessary but not sufficient. One of the key tasks of an executive coach is to make sure that the coaching is linked to strategic objectives. I feel that the best coaches closely examine the core tasks at hand and then also identify the core emotional challenges. They are involved with the leader as they work together and discover how task and emotion are interrelated.

Bob: My topic was forming teams of excellent executive coaches. I suggest looking at it from different angles. Understand that most coaches work in isolation. We really have to focus on allowing independent coaches to survive along with our profession. We need to be working together and determine what an organizational coaching model might look like with a team of coaches deployed. Thirdly, if we’re all doing work together inside the same organization, think about how you deal with the issue of confidentiality.

Bill: I was asked to talk about models of coaching in organizations—which means I’m going to step out a little bit from executive coaching. The differences between performance coaching, executive coaching and alignment coaching cause me to put executive coaching in a broader framework. We need to drill a little deeper and talk about three different models of executive coaching. One is called reflective coaching, which needs to be linked with training in relationship to executive coaching. We also need to consider instrumented coaching by looking at the relationship between 360 feedback processes and coaching. And, we have observational coaching and the link between executive coaching and strategic planning. Drilling down still farther into executive coaching we can talk about three kinds of coaching issues: coaching around puzzles, coaching around problems, and coaching around mysteries. Then, relate these to the notion of internal and external locus of control.

Klaus: My topic is coaching executives versus true leaders. What I have noticed in my experience over the last few years, whenever I coached top executives, was that I was not always encountering true leaders. The coaching issues that surface when this occurs make it a very difficult issue. From a German perspective, the culture is to blame for this circumstance. My view on this is that it is not unique to Germany or Europe. The large variance that can sometimes exist between leadership skills and an executive title are quite challenging to deal with as an executive coach.

Val: I addressed the future of coaching. The future of coaching to me is not anything that is a year from today or even five years from today. I’ve learned that if we’re to be successful executive coaches, we can’t just focus with executives on what’s happening today. They need much more than that. I think as executive coaches, we do a
pretty solid job serving our clients. We help them communicate better and be better leaders. We aid in the process of strategy development and even support the planning process by asking what’s around the corner and what’s ahead to make your business more profitable? I think the challenge for us as coaches is we’ve got to get ahead of the CEOs. I think we follow along behind the executive to help and support them. I would like us to take a much, much bolder role and help executives know what’s ahead and how to prepare for what’s next. I think whether you’re an experienced coach or a new coach, it’s about how do we make our services more attractive and more meaningful so that they both help the bottom line and help executives individually.

Conclusion
This concluded the panel session. Considering the quantity and quality of information that was covered, it served as a strong launching platform for the topical breakouts that followed. These lively discussions and the Q&A sessions that concluded the panel session came together to form an incredible learning experience.

In summary, I once again thank and salute the esteemed panel participants who openly and unselfishly shared so many of their executive coaching expertise. It is gratifying to know that I was able to strengthen my relationship with each of these outstanding peers. I firmly believe that I benefited professionally from the information flow and I feel that all in attendance would echo my opinion. I now eagerly await the 2004 ICF Annual Conference executive coaching track that will hopefully include another and even more rewarding interactive panel discussion.

(Editors’ note: The 2004 ICF Annual Conference again has an executive coach panel discussion organized by Joan Wright. It is likely IJCO will again include an article that captures the richness and contribution of these participants.)

Endnote

To get an audiotape of the panel discussion
If you would like to hear a more comprehensive version of the panel session, you can obtain a tape recording online by going to http://www.coachfederation.org/conference/orderTapes. The price is US$22.00 and the product code is ICF03-EC5AB.

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Joan Wright is principal of O’Sullivan Wright Consulting, a firm specializing in executive coaching, leadership development and talent management strategies. Her practice helps companies achieve targeted business results by attracting, developing and retaining key leadership talent. Sample clients include the City of Charlotte, Wachovia, Wells Fargo and Duke Energy. Joan has 21 years of corporate experience in Human Resources Management roles with Philip Morris, Citicorp, GE Capital and most recently First Union National Bank where she was head of executive leadership development. She holds the distinction of Master Certified Coach and her professional affiliations include senior executive coach with Executive Coaching Network, Inc., International Coach Federation-Charlotte Chapter, and Rotary Club of Charlotte-South.
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