Global Coaching Contracts: 
Differences between U.S. and European Corporate Approaches and Lessons Learned

Laurie Voss And Stefan Oberli

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Global Coaching Contracts: Differences between U.S. and European Corporate Approaches and Lessons Learned

LAURIE VOSS AND STEFAN OBERLI

This article examines the differences, similarities and cultural nuances of the coaching vendor-selection process for U.S.-based and European-based multinationals. Drawing from a decade of experience in responding to more than 30 Requests for Proposal (RFPs), authors Laurie Voss and Stefan Oberli synthesize the process and business of becoming a successful vendor of executive coaching to global organizations. For example, in the U.S., many multinational companies are “outsourcing” the executive coaching function and seek vendors who can manage the quality, process, and delivery and will share status updates and other key talent information back to the organization. In Europe, coaching can be seen more as a “luxury”. Multinationals there often create their own coaching pool internally, comprising top local coaches who have been vetted by word-of-mouth or colleague referral. The authors also provide an in-depth look at a global RFP, from release to award, involving the technology giant EMC.

Meeting customer expectations within global organizations frequently poses complex challenges. Over the past decade, international business volume has increased, thereby generating a trend among multinational corporations to align development activities globally and leverage economies of scale. We are especially aware of the trend to do this for executive coaching services because we have been invited to participate in more than thirty Requests for Proposal (RFPs) since 2002. Decision makers, however, might be unaware of the considerable differences in the coaching activities of their regional subsidiaries, even when teams are assembled that include Human Resources and Organizational Development counterparts from all regions. It is important to gain a better understanding of common practices of multinationals in order to ensure quality of service, define realistic program parameters (including some that will vary by region), and set professional fees that will attract high quality coaches in every region. The goal of this article is to share lessons learned from our own experience servicing US-based and European-based multinational corporations for HR and talent professionals, as well as individual practitioners who provide executive coaching services.

HOW U.S. GLOBAL ORGANIZATIONS APPROACH COACHING

Each year, we are invited to respond to RFPs issued by U.S. multinational corporations (MNCs) that are seeking to procure...
global executive coaching services. The desired outcome is to have an extended team of external contractors to provide developmental coaching to high potentials and senior leaders in the corporation’s business centers around the world. In addition, they are asking for the extended team to manage each coaching engagement because internal resources are not available and/or are not ideally suited for the executive coaching oversight and management. MNCs headquartered in the U.S. are looking for a vendor (or two or three) to manage the quality, process, and delivery, as well as share status updates and other key talent information with the organization. In other words, they are looking to outsource executive coaching. The paths taken to organize the RFP, issue it, and manage the selection process are very different for each organization and will be expounded upon below.

**Pre-RFP processes in U.S.-based multinational corporations**

Although it’s possible that some independent coaches have been exposed to the RFP pre-work phase—as a former employee or as a prized external resource—most on the outside don’t see the work required on the part of internal resources in order to release the RFP. Based on the documents we’ve received and conversations we have had, anywhere from 25 to 100 hours are invested by several internal stakeholders prior to release. Often the primary drivers for the significant investment in the pre-RFP stage are the importance of establishing relationships with client-facing HR and understanding the state of the coaching as it currently exists in the organisation.

When an internal group has been charged with the task of creating a global coaching program, they often need to know the names of independent executive coaches, the financial investment, and the general nature of the coaching relationship: Is it very strong and positive? Is the HR partner included and satisfied with his/her level of involvement? And what are the impressions and feedback from the executive’s manager? These early discussions help the RFP team members understand who might be early adopters, and who might be stalwart advocates (or detractors) for the centralized coaching program. Do current independent coach relationships need to be preserved to keep from causing too much disruption after the contract is awarded?

Relationships with HR partners are paramount for keeping alive the channel to work within U.S.-based MNCs. As an organization with which you are coaching moves to more consistent and standardized approaches, you will want to have conversations with HR about your willingness to follow new rules of engagement — if you wish to continue coaching in this organization. The result of doing this might mean that you are invited to participate in global RFPs and/or you will receive a referral to the new global coaching organization with a corporate
endorsement for your work and a strong recommendation that the new provider affiliate with you.

Some organizations conduct short prequalification calls with vendors who have been identified during the research phase or vendors of which they are aware—even if they were not identified by internal stakeholders. Other organizations simply use a generic email of a global organization’s website or expedite hard copy files to vendors to the attention of the “global coaching lead”.

We have also experienced Requests for Information (RFI) that are explicitly linked to an anticipated RFP. It is our understanding that RFIs sometimes serve as prequalification for participation in the global RFP; if you do not respond, you most likely will not be considered for the global coaching RFP invitation list.

**RFP length**

In our experience, RFPs range from a personal one-page email request with outline, to an online e-procurement process (with no human contact other than a technical support), to a 35-page template plus pricing worksheet with more than 100 questions.

**RFP teams**

RFPs for global coaching almost always originate from the corporation’s Talent Development, Talent Management, Executive Development, and/or Leadership Development and Training practices; therefore, the lead will sit within one of these groups. The full RFP team might also include procurement and client-facing HR professionals including regional representatives for Europe/Middle East/Africa (EMEA), Latin America (LATAM), and Asia/Pacific (APAC).

However, the RFP sometimes is issued by a procurement lead. As we all know, HR/OD and procurement live in separate worlds and operate with different metrics. The former is primarily centered on harder-to-quantify people skills such as leadership and personal development, while the latter is primarily concerned with black-and-white issues such as optimized pricing or contract compliance.

When a Global Coaching RFP comes from procurement, the lead will be the gatekeeper, and he or she is required to review each submission for compliance with RFP requirements. It is the gatekeeper’s job to eliminate prospective coaching providers and make the first cut; therefore, the gatekeeper will look for non-responses or incomplete data. Many multinational corporations—and government entities in particular—have gatekeepers who follow checklists for compliance specifically to eliminate any advantage an incumbent organization might have.
It is rarely clear to the vendor organizations who will be a member of the review team and how much knowledge team members have about or what their preferences may be for specific coaching vendors. This makes the response and a presentation, if invited, somewhat tricky because it’s imperative to understand who is in the room, who has strong influence and opinions, and who ultimately is responsible for the decision.

**RFP timelines**
Once the RFP is released, invited vendors typically have two weeks to submit a complete response. Many require an email or form (“Intention to Bid”) to be submitted within three to five days. Others still require a non-disclosure. We always prefer a mutual non-disclosure so that our intellectual property is protected as well as the client’s materials. Once all RFPs are received, organizations usually stipulate two weeks to create a short list; however, many RFPs tend to take longer than that. The average is closer to four weeks. Following the announcement of the short list, organizations will often have a week to ten days to prepare a presentation and clear the calendar for travel to headquarters in order to present to the RFP team. The amount of time required to award the contract following the presentation varies dramatically from 48 hours to many months. In one case, the organization completely dropped the executive coaching initiative. This was after a six-month waiting period. In another instance, we are still waiting after proposing in early July, presenting in late July, and answering follow-up questions for the months of August, September, October, and November.

**RFP response requirements for submission**
The required response formats also have a number of interesting variations. The most straightforward are responses in MS Word with no limitations (in terms of graphics, length of answers, or overall document length). Another common response format is MS PowerPoint. We have also encountered requirements that stipulate only a 10-page response, or even 5,000-character limitations per question, while others supply just a few questions without structure thereby allowing free-form writing without extensive prompting. Some RFPs require hard copy submission only or electronic copies only while others require both. For these, you have to plan to complete production in time for it to be shipped, even though the electronic-submission-mindset would allow at least one more—if not two—working days.

**RFP “red thread”**
Although executive coaching is a more mature industry now than it was ten years ago, we continue to experience significant differences in terminology and definitions. Naturally, some of the differences are a function of the corporation’s culture and even their business strategies and leadership competencies. However, most RFPs also have one (or more) “red thread” or recurring
theme. For example, in one RFP each section required an explanation of process model, reporting capabilities, and defined supervisory roles. It was our hypothesis that this organization wanted to know the implications for quality control and accountability as they related to each element of the solution being addressed. Other red threads have been leadership competency models, a global coaching and program management network that matches the organization’s global footprint, and even guaranteed results.

**Post-RFP**

Following the submission deadline, internal teams begin reading the responses and synthesizing the themes. In our experience, we have been told that up to 33 responses were submitted for a single RFP. The responses can come from individual practitioners as well as global organizations. The RFP lead is typically responsible for distributing the responses and organizing group meetings to discuss and identify a list of finalists. This list might generate a single finalist, but in most cases the team will identify several vendors who will be invited to present to the full RFP team. Presentations are usually identified in the RFP timeline so finalists must be ready within a short turnaround to have a presentation ready and to travel. Presentations are usually 45 minutes to two hours and the lead might line them up back-to-back in one day or spread them out over several consecutive days. RFP team members are usually physically present but some corporations invite their global team members to participate virtually. Thus, presentations might be scheduled very early in the morning or very late in the afternoon in order to include APAC and/or EMEA.

**CASE IN POINT: EMC’S GLOBAL COACHING RFP**

In January 2008, EMC University’s Executive Development Group issued a global coaching RFP to forty independent contractors and organizations. Gisele Garceau, Human Capital Strategist, was the project lead at EMC and understood first-hand the steps required to organize a global coaching RFP, sort through responses, organize a presentation day and scoring rubric for a large team, and lead the team to a decision for contract award.

**Pre-RFP**

At EMC, external coaches were actively engaged with executives around the globe, and Executive Development was aware of most of them and had the responsibility for managing them. About one calendar quarter earlier, Gisele’s Executive Development team succeeded in gaining executive support for a global coaching program because the senior leaders knew the value of screening and vetting coaches, following a consistent process, focusing on the new leadership competency model, and being held to consistent and fair pricing standards around the globe. Executive Development undertook this mission because
it successfully made the case that the benefits and outcomes of executive coaching were directly linked to several components of EMC’s business strategy. Gisele, a new member of the Executive Development team at EMC, leveraged her research mandate and her new role status to reach out to the global HR community she had worked with for two years while working in EMC University.

Since Executive Development was responsible for managing executive coaching, Gisele engaged her HR partners to determine the current usage of coaching by their respective business/line clients. The questions she asked included the length of typical engagements, the cost, the outcomes, and the general reputation of each independent contractor. Her goals were twofold: first, where reputations and relationships were strong and positive, those coaching providers would be invited to the RFP; second, she established additional and more enriched and important HR relationships, shared the RFP vision, and could anticipate the level of adoption and receptivity. This was important relationship-building work that might be invisible to external providers.

Once she completed nearly 100 hours of interviewing and data synthesis, she established a partnership with an internal resource responsible for partner (vendor) management within EMC University. This “partner manager” helped her understand the different RFP formats, the legal language required, the general and specific rules to follow, and the procurement relationships that would need to be established.

**RFP length**
Based on the examples and suggestions during this phase, she was able to assemble a five-page RFP with two single-page addendums. The first addendum was a graphic with text that captured the steps for EMC’s newly branded coaching engagement. The second was a non-disclosure that was required before submitting a response.

**RFP team**
Gisele was the lead for the program; however, she identified the partner manager as the point of contact for the submission of RFPs. She formed an Advisory Board of 15 stakeholders: the executive sponsor, Talent Management team members, the partner manager, and line HR.

**RFP timeline**
Table 1 is EMC’s timeline. All vendors had one week to indicate their intention to respond. Before this one week expired, Gisele hosted a vendor inquiry call “for pre-solicited and real-time questions and answers” to be addressed. During this call, some vendors chose to reveal their names and organizational affiliation, so a live conversation requires great discretion if you want to keep your identity hidden from the other callers. An advantage to
remaining anonymous is that no one can “ghost” your strengths and weaknesses.

The live vendor inquiry call represents the one anomaly of EMC’s approach that does not match our typical experience. That is, most clients request an email from vendors with questions, and they in turn respond with a compiled list of questions and answers, all by email. The benefit to the RFP team is that email exchange remains less personal and more transactional, thereby providing a layer of protection in larger firms that require fairness and objectivity in procurement processes. The drawback to the independent coach or to an organization responding is that they are effectively prohibited from establishing rapport and building internal alliances that could potentially become their internal champions.

### Table 1. EMC’s schedule of activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date (U.S. based)</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP issued (certified mail and electronically) by EMC</td>
<td>January 14, 2008</td>
</tr>
<tr>
<td>Vendor inquiry call</td>
<td>January 21, 2008</td>
</tr>
<tr>
<td>Intent to respond due by close of business (5PM EST)</td>
<td>January 22, 2008</td>
</tr>
<tr>
<td>RFP response due by close of business (5PM EST)</td>
<td>January 25, 2008</td>
</tr>
<tr>
<td>Top 5 vendors’ presentations to Executive Development and Talent</td>
<td>Week of February 4, 2008</td>
</tr>
<tr>
<td>Management teams</td>
<td></td>
</tr>
<tr>
<td>Project design and governance vendor selection</td>
<td>February 11, 2008</td>
</tr>
<tr>
<td>Ability to commence service offering</td>
<td>February 18, 2008</td>
</tr>
</tbody>
</table>

### RFP response requirements for submission

The sections of the EMC RFP were:

I. Overview of EMC
II. Overview of the RFP Originator
III. Introduction
IV. General Procedures
V. Vendor Requirements
VI. Fee Structure
VII. Additional Information

This structure is a very common one. All vendors were introduced to the full enterprise. Although EMC did not provide the highlights of the research findings, other organizations will share this in order to describe the drivers for the new global coaching approach. Next, we were introduced to the Executive Development and Talent Management Office practices and were informed about the coaching strategy, the level of senior management commitment to this top initiative, approximately
how many people would be eligible for coaching, and the primary business outcomes expected of the executive coaching initiative. One noteworthy element of all sections was the presence of legal language such as “Acceptance of the RFP in no way guarantees an executive coach contract for services.” Not all RFPs have this language; however, Gisele mentioned that the typical EMC RFP comes from procurement, not from the internal groups who lead the work. This approach represented a unique combination for both the vendor manager and procurement because Gisele, who would be our future client manager, was much more active than most other executive coaching clients previously had been in this early stage of work.

The fee structure section was also unique and extraordinarily vendor-friendly. We have completed dozens of Excel files with fee schedules with dozens of different cuts. In this RFP, a single-sentence prompted vendors to outline fees for a six-month engagement. That’s a refreshingly light way to approach pricing. In most RFPs, the pricing sections require a great deal of time and consideration in order to understand the requests and provide appropriate detail to support the quotes.

We have learned many pricing lessons. One is to demonstrate the number of contact hours and the number of preparation hours. This was an important issue for Gisele when she reached the point where she wanted to go to HR partners, describe the service, and articulate outcomes. She knew her internal clients (HR, Managers) would want to know how the fees would translate into service commitments. Gisele also recognized EMC’s orientation for “productizing” every service. This led to her request for “pricing packages” that was both creative and practical. This approach entailed identifying four bundles of services. The various packages would translate into the actual number of hours the executive would be required to commit and how much real attention they would receive.

Another pricing lesson is to be clear about the role of assessments and if any customized roll-up report will be needed. At EMC, we eventually determined that three independent assessment companies would be in the fullest-scope coaching engagement. To service this request requires additional time to write an integrated assessment report bringing standardized assessments, verbal 360s and coaching observations together in one comprehensive executive assessment report.

Finally, another pricing lesson learned is to propose several options so that price points range the gamut from targeted coaching engagements to expanded, comprehensive engagements for senior leaders in critical roles. Although many discussions were required before we landed on our final “rate card,” we knew that Gisele’s clients responded very positively to the flexibility in
options and the need to have different options from a pricing, process, and content perspective. Once again, understanding your client’s organization culture can help in identifying unique pricing arrangements that can streamline your bid, as well as respond flexibly to their internal need to sell a differentiated product to different levels of management at different price points. The “rate card” idea was also a practical solution, enabling Gisele to sell globally against a standard pricing schedule that felt to the internal organization like it had both flexibility to custom design its own “set of solutions,” or to pick one off the “Chinese menu” of services in a pre-packaged way.

Remember, not all organizations are educated sufficiently about how to buy coaching services, so the more you make coaching seem like a product offered in the same manner the company offers its products to its customers, the easier it is to consult-in the coaching practice. We have to do all we can to support our clients as they are working against an uphill battle at times in selling a comprehensive, global solution.

**RFP ”red thread”**

We hypothesized that EMC wanted to find a vendor who would act as an extension of a small team, and the network of coaches as an extension of Executive Development. The mission of Executive Development appeared to be heavily focused on coaching, thus we sensed that a partnership with them would require consistent, thoughtful engagement. As a result, we believed we needed to make visible our team members, roles and responsibilities, and years of experience. We thought that they wanted to get to know us in the RFP response. We also picked this up during the vendor inquiry call because they used words like “partner” and “team.” Rather than completely outsourced, we anticipated that they would carefully manage the process in partnership with an external team. We also sensed that they wanted to know how well we could match their global footprint, given that the high potentials were the level of employee targeted for coaching. In order to address this red thread, we looked at their business centers and focused our RFP to all the regions we could cover.

Another red thread that we interpreted was the importance of branding executive coaching in a positive way, in a results-focused way, and in a leadership competency way. We anticipated that executive coaching had a mixed reputation, that it was not easy to manage, nor was it directly tied to succession planning and organizational talent reviews. We highlighted the importance of creating a process, a set of materials, a team of owners, and so forth to emphasize the new “brand” of executive coaching under the leadership of the Executive Development office.
Post-RFP

A total of 33 individuals and corporations responded to EMC’s RFP. Gisele spent about 30 hours reading them from start to finish. After this, she kept to the side the strongest contenders for a global contract. Her goal was to identify “the final five” organizations to invite for a face-to-face presentation. Before she could invite anyone, however, she needed to summarize the strengths and weaknesses of each response and give the Advisory Board her summary snapshot. Her first step, prior to review, was to separate the responses into two groups: individuals and organizations. This was an important step because it allowed her to share responsibility with another team member (who reviewed all the independent vendors). It also allowed Gisele to focus on coaching firms, since their goal was to find at least one, if not two or three, larger coaching firms who could match their demand and scale with EMC’s globally distributed workforce.

Gisele identified the top five organizations and sent her summary of findings plus full RFP materials (from 14 organizations and 19 independent coaches). She had her team of 15 plan for a 10-hour day. Presentations would be scheduled on the hour for forty-five minutes. The vendors would be escorted out after each presentation, allowing the team to do a 15-minute verbal debrief. She led the team through an important discussion after each presentation to calibrate the previous vendors’ sets of scores or if they remained the same in light of what they had just learned from the most recent vendor presentation. At the end of the day, this rigorous process allowed the large EMC team to declare a unanimous winner. Within 48 hours, the news was shared and within two weeks, the contracts and substantive conversations were in full swing.

If you are an independent contractor and receive a global coaching RFP, it is strongly advisable that you submit a response. Those who respond as individuals (non-aligned with a coaching firm) might be referred to the global contractor who receives the contract. The RFP team might be looking for a wide assortment of individual contractors who have precise specialties that match their executive audience. Or they might interpret your non-response as non-interest and therefore will not recommend you for future work even if it remains available after the contract is awarded. In EMC’s case, we, as the contract recipients (Lore International Institute), have vetted a few of their independent coaches, and through rigorous assessment, have certified them to become part of our coaching network. This allows them to continue previous relationships at EMC while at the same time broaden their coaching business to include other Lore clients.

If you are a coaching organization, it might also be worthwhile to ask the RFP lead during the vendor inquiry stage if they have a rubric or set of criteria they will use to select the coaching vendor.
What priorities do they assign to the different criteria? If not provided, it is also wise to ask who will be in the room and what is their relationship to executive coaching. Introductions during a presentation might provide this information, but it will be too late if you want to customize your information to fit specific needs of the individuals present.

In summary, EMC’s RFP process clearly linked the company’s business strategy to the vendor requirements. As a result, executive coaches have a clear set of expectations and process steps that must be followed; executives receive a consistent and high quality coaching engagement regardless of their EMC business location; and EMC has more executives who are ready for promotion at a faster rate than on the job training or education could have provided in the same timeframe.

**HOW EUROPEAN GLOBAL ORGANIZATIONS APPROACH COACHING DIFFERENTLY THAN U.S. GLOBAL ORGANISATIONS**

The most significant difference between U.S.-based and European-based multinational corporations, in our experience, is the direct relationship between the European organization and its external coaches. Unlike U.S. multinationals, European multinationals typically create their own coach pool community of the best local, independent resources. Corporations build a coach strategy as part of their broader learning and talent corporate strategy. Accordingly, they determine selection criteria as well as a selection process. Moreover, corporate coach pool administrators drive the entire coach matching process, scope of coaching, etc. Lastly, some corporate coach pools are using their own quality measurements such as mid-term reviews and final coach evaluations. Often times using a coach provider is limited to the needs in “exotic places.”

Close working relationships are established between coach and coachee who connect through “word of mouth” or colleague referral. The interaction is personal and focuses primarily on behavioral issues. Coaching may be seen as a luxury. A high quality reputation is essential within the European coaching arena. Coaches are expected to have both industry and equal hierarchical experience. Face-to-face coaching is the standard and telephone coaching for anything more than a quick reminder is frowned upon. Additionally, Europeans approach assessments with caution and often times prefer a verbal assessment by a qualified professional. Written assessments can be unwelcomed. Metrics-based formal assessments, such as a Lore 360° or customized assessment, are utilized when desired.

This direct client-to-service provider relationship without outsourcing company also influences salary expectations. Independent European coaches keep the full revenues from their

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Laurie Voss is Vice President, Executive Coaching for Lore International Institute, a Korn/Ferry Company. She has been responsible for launching and orchestrating large global coaching programs with a particular interest in developing systems and processes that guarantee consistent, high quality, effective coaching engagements. Her clients include multinational corporations in high technology, consumer goods, financial services, healthcare and biotechnology, food and beverage, and entertainment.

In the past four years, Dr. Voss has recruited and certified more than 200 executive coaches, consultants, and faculty for the global associate network. She has designed and implemented multi-layer recruiting, certifying, and supervising processes. She has logged thousands of hours orienting coaches, consultants, and assessment psychologists to the unique demands that each client organization requires.
services. Current coaching salaries across Europe are significantly higher than those in the U.S. Global discounts mirroring national discounts in the U.S. may set salary requirements below market value, creating a situation where a local coach cannot be recruited. Low fees also render perceived value of services as “cheap.”

Considering that so many coaching consultants work independently, European fees are also charged at varying time blocks. Some charge by the hour. Others charge by the day or half day. Issues such as travel time, prep-time, administrative fees and travel expenses must also be considered. Costs widely vary by location. For example, costs of services in New York City are significantly higher than costs of service in smaller cities – and the same is true across Europe. To complicate things more there are almost as many currencies each requiring billing adjustment and subject to valuation shifts. In spite of these technical fee structure issues, a clear advantage for global coaching companies is the consistency of offering. Lore International Institute (www.lorenet.com) recruits, certifies and supervises coaches to assure the highest service quality. On the contrary, independent coaches may or may not be certified and are not supervised.

A defined standard with both measurable and comparable review processes is a clear strength. Lore International Institute’s European coaches are required to meet the following stringent criteria: (1) an academic degree within a coaching related field such as psychology, coaching, or organizational development; (2) 10-plus years experience in a leadership function; (3) five-plus years coaching experience; (4) coaching certification from reputable coaching school (ICF preferred); and (5) coaching association credentials and affiliation.

Other important service factors for global coaching contracts include communication, cultural approaches, appropriate fee structures and currency differences. For example, there are 23 official languages in the European Union. With the personal nature of the coaching relationship it is highly advantageous if both the coach and coachee share the same native tongue and that all documents are prepared in the local language. Furthermore, with the recent emphasis on emerging markets, global coaching offerings are expected to provide services even in the most remote locations.

One product for one price will not likely provide the flexibility required to meet the diverse needs of global organizations. In the increasingly competitive marketplace, coaching companies must adapt to these unique challenges, and, in so doing, differentiate their services to gain market share on the global stage.

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Stefan is a recognized expert in organizational transformation, executive education and leadership coaching. Having served as a CEO, Stefan brings a wealth of experience to his client relationships. He understands the needs of a broad range of industries and has provided executive coaching services within the financial, manufacturing, telecommunications, pharmaceutical, chemical, federal and state governments and health insurance industries. He has coached and consulted with leaders and leadership teams on leadership style, communication, performance management, organizational structure and alignment, change management, cross-cultural aspects, decision making, motivation and strategy, and he has designed, conducted and facilitated leadership events for many organizations, especially in multicultural environments.
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