

## Executive Coaching: the 8 Elements of a Successful Engagement

Clients typically seek an Executive Coach when one of their C-level personnel or one of their “high potentials” has untapped potential, ineffective approaches or a personal roadblock; that is, when one or more facets of how they go about their work are impeding their current success and may stand in the way of future promotion. Typically, the person to be coached (known as the “client” hereafter) has received some feedback concerning their ineffective approaches from co-workers or their direct supervisor, but this feedback has been unsuccessful in “turning them around” so that they meet the expected standard. Executive Coaching is a powerful, cost-effective catalyst that enables the client to clearly see their current reality, identify more effective strategies and then successfully modify their behaviors so that they stick long term.

Of course, not everyone has the skill or the disposition to be an effective Coach, but assuming that you’ve found the “right” coach to help you, there are still 8 elements that **MUST** be built into the coaching process in order to ensure real change and a totally satisfied client. This list, by the way, also applies if you are a coach seeking to set up a successful engagement with one of your clients.

1. **Clear objectives and measures:** With one executive, we were asked, in essence, to help her “be a better manager.” Her team didn’t respect her, and the office atmosphere was coldly polite, at best. While those may sound like solid starting places to begin work, you’re actually on shaky ground. If you are the sponsor or buyer – the one who is expending the resources for this intervention and is on the line for the results that those resources produce – then spend time up front clarifying (first for yourself) the behaviors that the client will exhibit **AFTER** a successful coaching engagement. You might want the “better manager,” as in this case, to provide clearer direction to staff, with set goals and objectives or provide effective mentoring for her employees or be a more effective delegator. Any of these objectives provide more direction for all parties than “be a better manager.”

In addition, you’ll want to clarify – and you may need your consultant’s help to identify this – specific measures, results or behaviors you will see so that you **BOTH** know how successful the intervention was. We were brought in to help another executive with “time management.” In discussion with the sponsor, we agreed upon the following measures:

- a. Prompt responses to emails
- b. Prompt responses to her BlackBerry
- c. Answering calls “when they come in”
- d. Being on time to every meeting
- e. Established structure/evidence of use so that others who seek her advice get what they need but don’t “steal her time”

Establish measures, but don’t get “too tight” about this. That is, it’s not required that you have an exact measure, as in defining the number of seconds after receipt in which the emails are to be returned. The measure just needs to be clear enough so that everyone knows it when they see it and all agree whether or not the objective was met.

2. **Buy in:** Coaching is a partnership between the coach and the client; without genuine commitment

from both parties, the coaching intervention will (not might, but WILL) fail. Once objectives are clear, they need to be discussed in detail with the client. He or she MUST understand and acknowledge the gap and the necessity (for their current success or future advancement) of achieving the objectives. If there is pushback from the client, the situation must be reviewed, renegotiated or possibly dropped with the client's sponsor. Which brings in the need for ...

3. **Ongoing Management support:** Every client needs to know that their success in turning their work around is important to their supervisor. Obviously, it already matters "somewhat," as the supervisor is often the sponsor and is already investing resources in providing the coach. Unfortunately, many managers think that their work is done once the coaching relationship has begun; instead, that supervisor's work has just begun. He or she may be called upon to provide additional resources, should the client's progress be dependent upon it. He or she MUST regularly communicate her expectation for improvement. In the most successful interventions, the supervisor is "kept in the loop" about intended strategies for improvement, monitors progress and provides feedback to the client, apart from that provided by the coach, on what they see in terms of continued difficulties, successes and tips for continued growth.
4. **Rapport:** While most professional coaches have the ability and skills to build rapport with most clients, some coach/client pairs just don't gel. Successful coaching relationships are give and take: changing ingrained behaviors is challenging work that involves disclosure of personal information and discussion of feelings, in addition to the more cerebral work of planning better strategies. For this give and take to happen naturally there must be trust and mutual respect between coach and client. If you're the sponsor, talk to the coaching client following the initial in-take session and learn how well the session went and the degree to which they "got along." If the client is cool to the coach, consider pausing the intervention until a more suitable (for this client) coach is engaged.
5. **Observation:** 360-degree or other feedback from third parties about the client's behaviors can be helpful, but nothing replaces "seeing them in action." When hiring a coach, you're (hopefully) hiring expertise and a broad range of experience with other clients in similar situations. Feedback from internal sources rarely reflects this depth of expertise and may be "tainted" by inter-office politics which don't accurately reflect the client's true behaviors. To get the most value for the client from the coach, make sure that the contract allows time early in the engagement for the coach to shadow the client as he or she goes about their daily work, observing the types of situations which call for new strategies and new behaviors. Expect the coach to develop or refine their objectives and strategy for the coaching intervention after the observation. (And give extra points to those coaches who insist upon an initial intake and shadowing BEFORE providing you their objectives and coaching outline.)
6. **Understood Coaching process:** how often will the coach and client meet? How will they meet: in person, by phone, over email or chat, or a mix? What will the process be during those meetings? Will regular "fieldwork" between coaching meetings be expected? What benchmarks will be achieved by when? When will it be time to close out? While new information can, at any time, necessitate a change in how the next meeting or set of meetings will flow, a clearly understood process allows all to prepare for each meeting, to monitor progress and, in general, to act as partners in ensuring the intervention "stays on track." If you are the sponsor, ask your coach to explain the general process for each meeting, the overall process for the intervention and how each component of the intervention will add value and move the client closer to achieving the objectives.
7. **Sufficient Time:** As noted earlier, behavioral change takes time, time that may be in precious short supply as the needs of the business ramp up and take center stage. On the front end of the

engagement, ensure that enough time (in terms of days/weeks/months) is built in to allow for the uncovering of challenges, defining and testing of new strategies and “ingraining” of new habits. As an example, we require new clients to agree to a minimum of 3 months to ensure success; be wary of coaching interventions which promise real change in significantly shorter time periods. Also, reinforce with the client your expectation that they “make” all of their scheduled coaching meetings and NOT allow these to be bumped in favor of more “pressing” issues: if you’re going to invest the resources, don’t allow the intervention to be side-tracked or derailed by last minute “emergencies” for which the client fails to plan. Expect that the client will effectively manage his or her time so that the normal “work” gets done AND coaching commitments are kept.

- 8. Closure and Next Steps:** All good things must end, and coaching, like other significant relationships, needs formal closure. Clear objectives and measures were established on the front end, regularly reviewed and now all can see that they have been achieved. Rarely, however, is the coaching client completely “cured”; that is, new habits are in place, but old tendencies remain and may still need conscious attention. The formal close-out meeting should review and celebrate the client’s success, discuss how he or she will continue her learning and growth in which areas and what support he or she can expect from the coach now that the engagement is formally concluded.

**A Coaching Partnership is powerful.** When conceptual agreement is reached, rapport established and strong support provided by the sponsor or other senior management, the client will gain a clearer understanding of him- or herself, their environment and steps they must take for continued success; executive personnel thus achieve and sustain new levels of performance that move them to or prepare them for the next level. Maximize your ROI by ensuring that all 8 elements listed above are part of your game plan with your coach.