

THE
White Paper
S E R I E S

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BEST PRACTICES FOR MANAGING GLOBAL
EXECUTIVE COACHING SUPPLIER RELATIONSHIPS

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More global companies are turning to executive coaching to help their senior executives develop. Executive coaching is especially important as companies implement succession plans and develop their next generation of leaders at all levels, but coaching is increasingly the preferred method of developing senior talent within organizations. Executive coaching is one of the most cost-effective means of helping executives assess and increase their leadership effectiveness, prepare themselves to move to the next level, and adapt successfully to the new leadership challenges they face.

However, companies have not always effectively managed the coaching that occurs throughout their organization. In some cases, the HR team has not even been aware of all the coaching taking place, has no way to assess the effectiveness of that coaching, and cannot manage the costs of coaching. Consequently, more companies are turning to global coaching suppliers who can conduct the majority of their coaching around the globe. In this brief paper, we will identify the best practices Lore has discovered in implementing global coaching programs for clients.

Although we could cite numerous best practices, we will focus here on the seven overall best practices that in our experience have the biggest impact on the success of a global coaching program:

1. Follow a standardized coaching process.
2. Build mutual accountability into the coaching process and supplier relationship.
3. Ensure consistent high quality among coaches.
4. Ensure that the supplier can scale to meet global requirements.
5. Ensure that the supplier has a robust management information system.

6. Set clear expectations about confidentiality.
7. Treat the coaching relationship as a partnership.

1. Follow a standardized coaching process

The value of having a global coaching supplier relationship is consistency and predictability, so the supplier should be able to guarantee that all its coaches, anywhere in the world, follow the same process. Individual coaching interventions may vary, depending upon the needs of the person being coached, but the process itself should be consistent. Process consistency helps ensure that the supplier's coaches are following the best practices that are reflected in the process, that the supplier is managing coaching systematically, and that the results the company gets from coaching are more predictable.

The coaching process used should reflect best industry practices and should be consistent with the company's culture, leadership development programs and philosophy, and the development needs of its executives. Suppliers who are not willing to adapt to a company's human capital frameworks and processes are not likely to be easy to work with in other areas either.

2. Build mutual accountability into the coaching process and supplier relationship

In a cost-effective and successful coaching program, coaches and the executives they coach are mutually accountable for achieving successful outcomes. Furthermore, they should achieve measurable results within a specified time period (usually six months). To build mutual accountability into the process, best-in-class companies have done the following:

- ▶ Ensured that the coaching focused on no more than two or three observable, measurable behavioral changes as the goal of the program. These goals should be clear, measurable, specific, behavioral, and written into a personal development plan that identifies not only the desired change outcomes but also how these will be achieved.
- ▶ Established a behavioral benchmark before initiating coaching and gathering data on the executive's behaviors through 360° surveys, climate surveys, employee or customer satisfaction surveys, and/or interviews.
- ▶ Included key stakeholders (such as the executive's supervisor or key direct reports) in the benchmarking process before coaching, and included them as feedback and information sources during and after coaching so changes and improvements could be measured.
- ▶ Made the development process transparent to the executive's supervisor and the relevant HR manager. Transparency means that these people are aware of the executive's development plan, help the executive achieve his/her goals, and discuss progress with the executive and the coach.
- ▶ Measured the outcomes of the coaching. Every coaching engagement should be results based and "information rich" so that the executives who are being coached have continuous, helpful, specific feedback on the behavioral changes they are attempting to make.
- ▶ Made learning a priority. Best-in-class coaching relationships are ones in which the supplier and

the company meet regularly to review coaching results, examine the feedback from executives who have been coached, and then apply learnings to future coaching engagements. A continuous learning loop is essential to maintaining consistent high quality in global coaching. In some best-in-class global coaching relationships, the company and the supplier build learning events into the process. These learning events may include lessons-learned forums with supplier representatives, coaches, and HR managers; seminars; and process improvement working sessions.

3. Ensure consistent high quality among coaches

Clearly, the caliber of the coaches is one of the most important factors in a successful global coaching program. The executive coaching supplier should have a rigorous coach certification program to ensure that the coaches offered to executives have met high-quality standards, are experienced coaches at the executives' level, and will be successful and trustworthy development partners.

Beyond general coaching certification, a best-in-class program also includes certification for the particular company sponsoring the coaching. The supplier should certify the coaches it assigns to the company by educating them on the company's culture and executive climate, the company's expectations and requirements for the coaching, the company's leadership competencies or framework or other relevant models, the company's 360° assessments or other tools used to assess leadership competencies, and so on. All coaches who serve the company should begin high on the learning curve and know enough to provide competent and capable

assistance from the beginning of the program. Best-in-class global coaching suppliers should provide this additional level of company-specific certification before the first coaching assignments begin.

Finally, the supplier should be rigorous in measuring coaching effectiveness and eliminating any coaches who fail to meet the minimum high standards.

4. Ensure that the supplier can scale to meet global requirements

The coaching supplier should have global presence and the ability to provide certified coaches wherever they are needed within a reasonable period of time. The benefits of having a global provider are uniformity, consistency, predictability, and higher value through a single point of contact for all coaching needs. These benefits diminish, obviously, if the supplier is unable to provide coaches where they are needed. However, it would be unlikely that every global coaching firm has all the coaches who might be needed in every location around the world. Therefore, the supplier should have a robust coach recruiting and certification program and the ability to scale quickly and with consistently high quality when the need for more coaches arises.

5. Ensure that the supplier has a robust management information system

From a management standpoint, the key to a successful global coaching program is having an effective online management information system that enables both the company and the supplier to manage coaching engagements, track engagements from start to finish, and measure coaching quality long term. The best-in-class systems are Web-based

using secure sites with limited password access for the people in the company who manage the global coaching program and the supplier's coaching management team. In the best cases, these Web sites are customized for the company and include the information the company needs to initiate coaching assignments, follow their progress, and measure the effectiveness of each engagement and coach.

Many global coaching suppliers also use online systems to host assessments that might be used in conjunction with coaching. The supplier should have the IT capability to ensure that the sites can be customized for the company and maintained 24/7. The best-in-class suppliers also provide their assessments in multiple languages and provide continuous support for company users.

One of the primary benefits of a global coaching relationship is having a supplier who can provide all of the coaching management information and do much of the coaching management itself. In the best of relationships, the company does not have to devote any significant management resources to managing the coaching program because the supplier manages all of the logistics, scheduling, reporting, and problem resolution. Having one global supplier enables the company to receive one periodic report that captures all the relevant coaching reports worldwide. This reduces the company's overhead costs and thus improves program efficiency.

6. Set clear expectations about confidentiality

Companies have different expectations about the confidentiality of the coaching process and the information developed during coaching. Coaching

suppliers should be flexible within the purview of their professional responsibilities. However, coaching suppliers should agree to keep all personal and company information highly confidential, and the company should not ask suppliers to reveal information learned during coaching if such information is personal and not business related.

Whatever the company's position on confidentiality, the expectations and agreements about confidentiality should be clearly understood by all parties, including the executives being coached. Being transparent about confidentiality will help prevent problems or misunderstandings later.

7. Treat the coaching relationship as a partnership

The best-in-class global coaching relationships are partnerships, at least in spirit. If the company treats the supplier as a vendor, then vendor-like behaviors may result. Both parties win if they treat each other as partners in performance improvement and work toward a win-win. Although "win-win" is an overused phrase today, it nonetheless accurately represents the right way for a company and a global coaching supplier to work together. In partnerships, both parties are looking out for each other's interests, have a common goal, and proactively find ways to improve quality and reduce transaction costs.

About the Author



Dr. Terry R. Bacon

Terry is founder, CEO, and president of Lore International Institute. Terry served as a U.S. Army officer from 1969 to 1974. During that period he was an artillery officer, an intelligence analyst, and a counterintelligence officer. He finished his army career as an analyst for the Defense Intelligence Agency in the Pentagon. After receiving a Ph.D., Terry taught at The American University and the University of Utah until 1977, when he joined a consulting firm offering communication skills training to government agencies and corporations throughout the United States. In 1987, he left that firm and worked with the Center for Creative Learning until 1989, when he founded Lore.

In his career in corporate education, Terry has created nearly fifty programs in writing, speaking, interpersonal skills, conflict handling, leadership, proposal writing, management, selling skills, influencing, marketing, strategic planning, and account management. He has delivered thousands of workshops to business groups worldwide. He has also served as a psychological counselor, working with clients in the areas of self-development, career development, leadership, conflict and problem resolution, and sexual abuse.

Terry is a prolific author, having written or cowritten nearly eighty books, film scripts, simulations, and white papers. His books include *Leadership Through Influence*, *Effective People Skills*, *Leading in a Boundaryless Organization*, *High-Impact Facilitation*, *Helping Customers Buy*, and *Proposing to Win*. He has also created a number of skills surveys and assessments, such as the *Survey of Influence Effectiveness*, the *Coaching Effectiveness Survey*,

and the *Lore Leadership Assessment*. Terry is a frequent speaker on topics related to leadership, sales and strategic account management, and corporate education. His most recent publications are *Winning Behavior: What the Smartest, Most Successful Companies Do Differently* and *Adaptive Coaching*.

Terry has a B.S. in Engineering from the United States Military Academy at West Point and a Ph.D. in English from The American University in Washington, DC. He has also studied business and marketing at the Roosevelt University, and strategic planning at the Wharton School of Business, sales management at the University of Chicago School of Business, psychology and counseling from Goddard College, and business management and leadership at Stanford University.

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