

Executive Coaching Guidelines



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Facilitating Individuals and Groups to Success

The Goal

Organizations invest in capital, equipment and human potential. Coaching is a vehicle to enhance the human potential investment, through assessment, goal-setting, work and achievement of observable/quantifiable results.

The Process: Assessment, Goal-Setting and Monitoring

Coaching takes an individual from where she or he is today to where she or he ought to be. Once the initial goals are defined – by the coaching requester/ sponsor -- the individual participates in an assessment process to learn where she or he is in relationship to the goals, and then develops an action plan to achieve success. Specific steps include the following:

***Coach/Project Sponsor Initial Meeting** – An up to two-hour meeting is held with the project sponsor (which could be the individual, the individual's boss, board president, etc.) to get feedback on the individual, set expectations for the process, and establish goals to be achieved.

***Coach/Participant Meeting** -- An initial two-hour meeting is scheduled to develop confidence and trust, set the groundrules for the process, learn what the issues are from the individual's point of view, and to establish the (initial) goals/outcomes* to be achieved. The individual completes some form of assessment, such as a 360-degree feedback instrument, or a series of skills and values documents, etc.

**The initial goals often change at the conclusion of the assessment process.*

***360 Degree Feedback Sessions** – If the 360 is selected, several sources of input on the individual's performance is gathered through one-hour, one-on-one confidential sessions with the individual's superiors, peers, subordinates, and (at times) customers or other stakeholders. The completed assessment instrument forms the basis of the dialogue. (As noted above, the individual's initial goals are validated or revised through this process.)

***Coach/Individual Meeting** -- A second two- to three-hour meeting is held to deliver the feedback, elicit reaction, and work on goal setting to respond directly to the feedback. (At times, this becomes a two-meeting process if the participant needs to digest the material before developing goals.) Depending upon the feedback and goals, the plan could include any or all of the following: a series of one-on-one sessions to develop specific methods to tackle specific issues; the coach shadowing" the individual to observe his/her workplace actions and to give him/her immediate feedback on activities; and/or, team-building within the applicable workgroup and/or other group sessions.

***Individual/Sponsor Meeting -- Achieving Desired Goals/Outcomes** -- A specific action plan, with milestones and goals is developed by the coach and individual and presented and agreed-to by the sponsor. The individual presents the plan to the sponsor in a one-hour meeting; coach attendance at the meeting is optional.

***The Coaching Process** -- The coach and individual work through the plan, through a series of one-on-one-meetings with the coach monitoring the action plan to ensure it is followed.

Time Frame

Oftentimes behaviors have developed over years, thus, overnight success is unlikely. An initial 90-day period with an average of one coaching session per week will give the organization and/or individual a sense of whether success can be achieved. The coach recommends concrete, actions to take (or refrain from taking) to change others' perceptions of the individual. (Any team building, communication skills building, or leadership training will be conducted separately.) The one-on-one coaching can be renewable quarterly.

Success Stories

Example #1: Senior financial executive (Fox Filmed Entertainment) about whom subordinates said “we always know when we screw up; we never know when we do well,” and about whom peers attributed Machiavellian motives, since they spent time with him only in team meetings (where he danced circles around them technically). The coach advised the executive on practical, concrete steps to turn around the perceptions of each group, which the executive implemented and were successful in changing others' perceptions of him. Among other things, the coach advised, as follows: “without being phony or fake, surely you can thank an employee for something during the course of the week, and give an ‘atta girl/atta boy’ to someone else for a job well done.” These simple acts forced the executive to become aware of the contributions of his staff; within six months, employees wanted to come work for him. Re: peers, he was asked to have lunch with a different peer every two weeks and discuss anything BUT work. This resulted in his becoming aware of his peers' views/perceptions of him, and in forming more collegial, less combative relationships.

Example #2: Executive Director of a legal aid foundation that the Board acknowledged had great technical expertise, however, found that he often interrupted, speaking over them and donors. The coach established a groundrule that he was to speak last in all interactions. This forced him to listen to what others were saying, and to forge more respectful, positive relationships.