



## BACKGROUND

The 2010 ICCO Lab was held September 29-30 and October 1, 2010, in Chicago. Designed to give attending ICCO members a forum for structured discussion about key questions that affect all member stakeholder groups, the central theme was “Creating Excellence in Coaching in Organizations.” There were opportunities throughout for participants to identify resources, relevant organizations, and parking lot items for future reference. These can be found in the three lists at the beginning of this document.

The Lab design, reflected in the further content below, organized the dialog around three acts. In Act 1, a World Café format enabled successive tables to engage in four rounds of conversation around each of four questions about issues of excellence. The last table was asked to summarize the highest priority items for their question. In Act 2, tables again engaged in a World Café format with questions across four rounds, this time organized around each of the different stakeholder groups. There was then a large group discussion around the content generated in the most recent rounds, extending the conversation. In Act 3, we reviewed what the group wanted from the previous day’s session, what ideas came to light, and how they wanted to play within ICCO. We then moved into a circle and shared stories of what we had learned, both from circumstances that were challenging and contracting issues, as well as best practices that we now bring to the table in our own practices. From what was shared we asked how we could leverage the expertise in the room. It was a wrap!

You have the notes taken from the Lab discussions. These can be considered brainstorming notes, with each subsequent round (table’s input) built on its previous tables’ inputs. We have taken the liberty of organizing the generated items and eliminating duplicates. For Act 1, you have the summaries of the work done. For the details of Act 1, see Appendix 1 at the end of the file. We hope this document will spur further thinking, discussion, and actions that add value for you as an ICCO member and for the field of coaching in organizations and all its stakeholders.

## RESOURCES

- Kruse, Ann. (2010). The ROI Trap. *OD Practitioner*, 42 (Summer)
- Sherpa – 5<sup>th</sup> Annual survey - download at [www.sherpacoaching.com](http://www.sherpacoaching.com)
- Zander, R.S., & Zander, B. (2002). *The Art of Possibility*. Boston: Harvard Business School Press.
- ExecutiveCoachingForum.com (Handbook + Competency Model= free)
- Peer Resources, [www.peer.ca](http://www.peer.ca) – Coaching & Mentoring Library – Basic (free) Full access: modest fee (joining is recommended)
- Graduate School Alliance for Executive Coaching, [www.gsaec.org](http://www.gsaec.org) (standards for coaching education)
- Institute of Coaching (Harvard), [www.instituteofcoaching.org](http://www.instituteofcoaching.org) (research grants and guidance)
- International Consortium research forum – global coaching convention

## COACHING ORGANIZATIONS

- ICCO
- ICF
- IAC
- Executive Coaching Summit
- Conversation Among Masters
- WABC
- ISPI
- GSAEC
- HCI
- ACTO

## PARKING LOT FOR ICCO BOARD

- Additional sources of revenue
- Input to ICCO website
- Other events
- Build IT/Technology membership
- Research – where members can go for reference to current research reports/articles = vetted portal? – Research Committee?
- Increase member involvement/participation through email channels

## ACT 1

### **Q1 Summary - Overview - Synthesis of Key Business Trends & Potential Impact on Organizational Coaching in Next 2-5 Years**

- Globalization
- Virtualization of work environment
- Stress/burn-out/disengagement/24x7 work (resilience & adaptability) environment
- Requests for prescribed, specialized coaching
- Shifts in workforce demographics
- Evolving change in leadership challenges and org culture (complexity and uncertainty)
- Breakdowns

### **Q2 Summary - What are the thought partnerships that the client organizations require from coaches and educators?**

- Tailoring - customizing
- Experience
- Process
- Competence

- What will these conversations create?
- Impact and results
- We need to ask - what is important to the org?
- Helping stakeholders define needs within org

### **Q3 Summary - What defines Mastery or Excellence in coaching in organizations?**

- Macro/Micro distinction
- Clarity alignment of purpose / def. of success
- Org/political savvy and understand of corporate culture
- Assessment of openness to learning and whether a learning org or becoming one
- Awareness of constituencies
- IOB - Impact on Business
- Plan for who gets coaching
- Coach traits - self awareness, humility, curiosity, presence, awareness

### **Q4 Summary - Where does it make a difference to have research-based answers about what works in coaching in organizations, rather than simply anecdotal opinions and observations?**

- How research makes a difference for coaching in orgs
- Selling coaching services to orgs
- Provides ROI (proof)
- Contributes to defining and evolving a profession of coaching
- Serves for our own practitioner validation
- Serves to evolve theory and models (i.e. our learning)
- End with story

### **When selling - ROI**

- With clients that provide data -- scientists, engineers, accounting
- For HR to show relevance
- For the profession
- For own validation/growth
- Scholar/practitioner model
- To develop common narrative
- Data - not just #s - culture
- For coaches: coaching
- Company based research - org specific / as opposed to purely academic
- To work toward "theory" /models, etc.

## **ACT 2**

### **Detail and Summaries**

- Measure/Recognize Mastery / Excellence
- Credentials
- Experience/References
- Results/References
- Size of toolbox/ability to use / agility
- Fit (organizations and individuals) / perspective
- Values
- Continuous learning

### **Build Internal Coaching Capacity**

- Organizational savings
- (The) great leader to run it
- Buy-in from top (top people model it)
- Commit resources and people (not add-on)
- Trust and confidentiality
- Training managers
- Peer coaching
- Credit / Recognition, etc.
- Clear contracts
- Through managers – train them/integrate coaching into management role
- Take interested line managers and make them coaches
- Clear issue boundaries
- At lower levels
- Provide consistent model for coaches to use
- Coach team meetings /successes/challenges (community of practice)
- Avoid “fad of the month”

### **Integrate Internal & External Coaching**

- Sharing best practices, models, information
- Create mechanism for externals
- Client organizations / coaching program
- Managers / Coaching program managers (CPMs)
- How do I measure and recognize mastery of excellence in coaches / potential coaches?
- How do I build more internal coaching capacity?

- How to integrate internal and external coaching?
  - By levels
  - External coaches for higher levels
  - Clear definition of which / when
  - Clear levels/boundaries
  - Meet on regular basis
  - Supervise groups
  - Pair internal/external to do programs / facilitators

### **Measure/Recognize**

- Who are your teachers?
- People who can teach me something
- Open to learning
- Related educational experiences
- Credentials
- Experience in sector / industry
- Customer-focused
- Experience coaching
- Valued coaching
- Competence
- OD systems thinker
- Sales pitch
- Values alignment
- Results orientation
- Fit / chemistry with CPM and for coachee
- Fit with organization / culture
- Brings different perspectives

### **Q1-7**

- References and referrals
- Experience
- Breadth of approach
- Philosophy, values
- Approach/ consistency or adaptability
- Not cookie cutter
- Depth
- Spark
- Fit/compatibility

- Challenge conventional wisdom or way of thinking
- Mock coaching sessions
- Understand or can learn the business, culture, etc.
- Cost and cost structure
- By level: R/R, expectations, contracting
- Same playbook
- Community of practice includes both
- Share learning between internal and external coaches
- Evaluate process to measure outcomes

#### **Q1-8**

- Training of managers to act like coaches
- Peer coaching
- Outside one's line of authority (a la mentoring)
- Build trust in organizations – adhere to confidentiality
- Coach training program – set expectations, provide tools
- Commit resources and people – build into job descriptions

#### **Integrate External/Internal**

##### **Q1-3**

- By levels
- External for higher levels
- Sharing of info / models, etc.
- Clear definition of which kind of coach to use when
- Meet on regular basis
- Clear levels/boundaries
- Supervise groups
- Pair internal/external to do programs / facilitators

#### **Mastery of Excellence**

- Ask individuals / coachees
- Have impact aligned with outcomes
- Based on coachee's goals – spend time up front and match accordingly
- Define stakeholders – measure impact on each group
- Based on pre/post measurements (taken from coachee/sponsor/stakeholders)

##### **Q1-4**

- We don't know the first time; over time, collect outcomes data

- Appropriate style
- Background / experience
- Systematic assessment and development
- Recommendations: Organization's special credentials, i.e., security clearance
- Build internal coach capabilities and integrate
- Match with external coach
- Dialogues between internal and external coaches
- Consistent management of program
- Takes time to build this
- Keep it out of HR
- Staff / lead with functional heads

#### **Q1-5**

- Formal training from a credible source
- Years of coaching – at what levels (hours coaching)
- Interview structure (standard questions and responses)
- References (clients and other senior coaches)
- Can easily tell coaching stories
- Culture/industry-specific credentials
- Industry experience
- Assessment/certifications
- EI (for internals)
- Size of toolbox

#### **Q1-6**

- Have a coach themselves
- Continuous learning /personal development
- “Most difficult assignment”

#### **Q2 - Coaches/Coaching Organizations:**

**How do I build my own level of mastery/excellence? How do I communicate about it? What level needed to get hired?**

- Seek out masters/people I admire and follow them
- Follow passion to learn and build skills and experiences
- Self-evaluation and get feedback and development plan
- Find out what you do and what works
- List areas of expertise
- Know which engagements to take or not

- Leveraging your strengths
- Saying what you don't know
- Get/invite client evaluations with 1 page of feedback: what was the value? what has changed? can I use it for marketing? what else could I have done? review initial goods and progress?
- Marketing/communication
- Show who you are
- Being able to articulate what we are good at
- Back-up info – website
- Variety of offerings
- Build a track record
- Do good work with invitation (implicit) for them to let others know (raving forms)
- Drop names (with permission)
- Get references/testimonials
- (Develop and share) powerful short coaching stories
- Pursue opportunities to speak and/or write
- Ask and answer question, What level is needed?
- Needed for what? Depends on what organizations know to look for
- Coaching competence model – which competencies most important for engagement
- Develop level of self-awareness, curiosity, somatic awareness, emotional intelligence
- Centered / self-management / capacity to be with strong moods
- Knowledge of systems and curiosity about organizations (reading, writing, network, offer to demonstrate)
- Build and maintain personal integrity
- Experience risk taking
- Don't take self too seriously / avoid flakiness buffoonery
- Professionalism, presence
- Continuous learning
- Deliberate practice
- And/or WABC, EMCC
- Learn from other disciplines and experiences
- Knowledge of human behavior and stages of adult development
- Cultural awareness
- Ask client “what are you looking for?”
- Becoming a mentor coach
- Tools and instruments – build deeper knowledge about them
- “mastery” is more for coaches than for clients it's for us – “excellence”
- Have a variety of coaching experiences
- Have a supervisor or peer supervision group led by master

- Hire specific coaches for self depending on needs (matrix mentoring)
- Use co-coach – coaching consultation
- Communicating on level
- Finding others to communicate it
  - Word of mouth
  - LinkedIn
  - Networking
- Level of professionalism – contract, collateral materials, sharing resources online

### **Development**

- Continuing education / action learning
- Deliberate practice / stretching
- Reflection
- Collaboration
- Practice with feedback
- 70% experience
- 20% mentor
- 10% classroom

### **Marketing**

- Regular contact with previous clients to maintain relationships
- Avoid snake-oil = professionalism, not hype
- What will be required? Training and certification a requirement (formal training of some kind)
- II-3 Summary
- Best students possible – screening
- Curriculum – in depth skills, knowledge, theory, scalable 100, 200, 300
- Client input
- Encouragement, requirement for continuing education
- Ongoing case study conversations
- Standards for accreditation
- Integrity of training
- Competency – minimum level

### **Q3 – Educators/Trainers: How can “I” (educators and trainers) promote and produce coaches who will meet the mastery/excellence needs of clients?**

- Have to know clients well – data extensive and thorough
- Important for educational institutions to talk to each other

- Client organizations – here is what you should be teaching – addressing gaps (development, competency, content, learning)
- Educators collaborate with clients
- Add practicums – internships to training (multi-level, organizational executives, individual – multiple nudges)
- Develop a process that is marketable – use research effectively (feedback, supervision?)
- Responsibility re: educators and trainer (appropriate experience developmental piece that happens so training sticks)
- Use veteran coach designing and giving program
- Screen students
- Cross-pollination of methodologies (what is mastery from organization’s perspective?)
- Practice piece – experience (demonstrate skill level, outcome-based completion)

### **Supervised Practicum experiences**

- Build skills and identity as a coach [www.gsaec.org](http://www.gsaec.org) – standards
- Graduate programs – theories, principles, and practices
- Training – skills and techniques
- Peer coaching monthly with master coach
- Internal desire to be masterful
  - -needs to be required
  - -suggested courses of study
- Personal development
- Learning
- Reps from client organizations to schools
- Interviewing clients
- Style of coaching in this realm
- Continually evaluating programs – refreshing/reinventing – circular learning
- Body piece / somatics
- Gaps – coach to school
- Programs targeted to levels of growth
- Visibility of what is available
- Discussion of comparative approaches
- Assessment instruments
- Sources for depth of learning – get other/outside field: their standards, methodologies
- Delivery of coaching to client
- Contracting – sophistication
- Ongoing consulting / monitoring
- Convening a conversation around mastery (experience, stories, distinctions)

- Diagnostics – correct intervention?
- 100, 200, 300 (level courses)
- Standards, ethics
- Repetitive practice experience – rewards of that, level of desired results positive

#### **Q4 – 1 of 4**

##### **Researchers**

- How should mastery/excellence be measured?
- What is the relationship between mastery/excellence and business results?
- Getting comprehensive view of organization (org blindness if not comprehensive)
- Mastering criteria to be identified / defined
- Tendency to avoid credentialing / licensing Qs
- Modalities of data gathering (survey, interview, observation)
- Demonstration of quality performance over time
- What can other professions offer that we might use?
- Embodied knowing/fluency (invention of new moves)
- Artistry
- Continuing education
- Life experiences that provide embodied knowing

#### **2 of 4**

##### **Relationship between Mastery and business results**

- Did we achieve results? What was the impact of coaching experience? How important is the research?
- Attributable to coaching?
- Degree of confidence in estimate?
- Do we want to deal with question of “mastery”?
- Who is making assessment of results? Of mastery?
- Important to contract related to identified results (and measures)

#### **3 of 4**

- Distinguish between demonstrated excellence and experienced mastery (self-defined, ongoing, developmental)
- What is a result of coaching? Happiness, depression
- Good to great
- Diversity of kinds of coaching can provide
- Level of person one can coach
- Work intuitively vs. formulaic
- Experience “perfect” experience

#### 4 of 4

- Summary
- Can't measure what you can't define
- Coaching industry doesn't invest time/money on research
- Research should be done – but by someone else
- Research is complement/partner to practice
- Excellence and mastery are not synonymous
- Coaching often does use models that have research basis
- Strategy Discussion
- Social Network
- Marketing
- Integrated Strategy
- Branding
- PR
- "ICCO" Speakers
- Heart – values (and related) behaviors
- Head – vision/organizational principles: goals, plans, roles, responsibilities, experiences

## Appendix 1. Act 1 Details

### Q1 DETAILS - What are the top business trends we see that will impact coaching in organizations over the next 2 - 5 years?

- Aging workforces (“recycling” workforce)
- Increasing age of coaches
- Greater awareness of benefits of coaching within general population
- Greater awareness of benefits of coaching within organizations by organizational membership
- Challenge of alignment throughout organizations (across and down, multi-national aspects)
- Virtualization of teams across world and cultures
- Polarity tension between centralization and decentralization
- Employee engagement (including impact of multi-national workforce and how to manage and lead)
- Coaching offered proactively
- Range of acceptable / effective leadership styles
- More constructive and targeted use of feedback (coach/consultant generated)
- Continued drive to lower costs (with increased productivity) for private sector
- Develop quickly senior managers to impact leadership gap
- Globalization
- Reverse globalization (in-sourcing) in U.S.
- Working harder vs. working smarter
- Virtual:
  - Meetings
  - Working practices (tele-commuting)
  - Communications
  - Managing within to support virtual environment
- Isolation
- More women as senior leaders
- Workforce shifts: gender, generational, cultural
- Business success defined per triple bottom line (includes sustainability & CSR)
- Hero leader (survivor) complex
- Velocity of promotion without requisite experience
- Work hours not set, demand for 24 hours
- More globalization
- Greater impact of cultural differences and impact on community, coordination of action and delivery
- Increased stress
- If burn out occurs, crisis of organizational vs. individual values
- Breakdown of managing integrity and accountability given increasing expectations
- Some workforce have had multiple coaches (more sophisticated) – challenge to design & deliver value-added coaching
- Higher demand for coaching for strategy (coach more knowledgeable re: strategy and can forward strategy)
- Requests to be coaches “out” of organization

- Requests for “scalable” coaching programs

**Q2 - What are the thought partnerships that the client organizations require from coaches and educators?**

- Best practices
- New ideas
- Forward thinking
- Trends – coaching in the interest of helping businesses
- Staying on track to care about people
- Bring evidence/research
- Impact every level in organizations
- Cultural change – 7 catalyst conversations
- Culture sustained
- Empower at lower levels
- Build sense of identity
- Engagement will be shifted
- Clarity of expectations
- Cultural lingo
- Eliminate hierarchy – speak to strengths instead of ‘power’
- Coaches and educators
- How coaches learn?
- Distinction of different coaching schools
- Organizations aware of what they should be asking
- Researchers (organizations = coaches = educators)
- Data
- Knowing coaches values and organizational values if they are in congruence
- Schools focused in systems thinking
- Train organizational leaders – internship for example
- Train by sending to coaching schools
- Internal and external coaches – benefits
- Forge coaching culture in organizations through learning
- Educate – orient everyone through coaching
- Educators partnering with research to improve ROI
- Organizations want methodology that works like studies

**Q3 - What defines Mastery or Excellence in coaching in organizations?**

- What defines masters or excellence in coaching in organizations

- Systems thinking vs. individual/LDR
- Orgs. capabilities mission accomplishment
- Who defines mastery/excellence? The client, who is it? Sponsor coaches
- Clarity of common goals or help create them. movement toward goals
- Influence clients to learn, use our expertise
- Structure-an internal voice counts, influence
- Communication-naming what we see. Seeing big picture see bigger and challenge
- Micro-coach coming in to micro - the organization
- Identifying/hiring the coach whose [skills, interests, values] match the organization
- Value of people under lying-allows coaching to input in organization
- Includes coaching organization?
- Macro vs. micro
- Partnership- systematic connection among stakeholders
- Clarity of purpose / alignment with organization's mission
- Formal phase of discovery = better understanding of culture
- Amy Emmenson
- Assessing how open organization is to coaching + learning
- Learning organization
- Buy in
- Clear understanding of what success looks like success focused- not gap filling
- System focus- not just the IP
- Standardization - customization
- Balance
- HR-business interest
- Line oversight
- Under incredible pressure
- Organizational savvy
- Awareness of constituencies
- Alignment of interest + Definitions of success
- Competing?
- Political negotiation
- Differences in programmatic coaching vs. more individual
- Building capacity
- Coaching engagements vs. coaching conversations
- Coaches or manager as coaches? what differences?
- How does one support excellent coaching?
- Mastery in coaching in organizations vs. coaching in general
- 3 levels – external, coach, coming
- Internal holistic program
- External company comes in with holistic program
- Clear, well-defined way of deciding who gets coaching

- impact + results shifting accelerating, deepening
- IOB (Impact on business)
- Coaching can't take a system further than the coaches level
- Coach not hostage culture of leader as coach
- Shifting developmental levels
- Team results- collaborative
- Sustainable
- Evolution
- Feedback from coach's level of coaching?
- Ease of transition out of coaching
- Creating something new in the organization
- Engagement
- \*\* Humility-not walking in already knowing the answer
- Client-quality of relationship results/impact
- Multiple definitions- org- results/ Impact
- Congruence between client + org goals + results
- Focus on client +organization's agenda
- Coach has huge knowledge base
- Understanding of organizations
- Working in (or studied?) in organizations
- Systems
- Coaching competencies/ skills
- Coaching is a "gift"?
- 10,000 hours of deliberate practice (George Leonard)

**Q4 - Where does it make a difference to have research-based answers about what works in coaching in organizations, rather than simply anecdotal opinions and observations?**

- Scientific based organization
- When is it available to have - estimate impact
- Research based = scientific method = peer review
- Always gather data to share
- Experience: we contract around results - client makes connection because they have data
- Experience: contract for outcomes (client's)
- Coaching is providing tool
- Experience: researching on results from own practice to understand which approach to use for client
- Experience: pitched scientific organization - organization responded to stories but having research made difference to how carried ourselves in relation to O.D., performance management
- Give opportunity to differentiate coaching
- question scientific base of ROI studies
- what are components of scientifically-based research?

- Anecdotes can be research
- we can quantify qualitative information
- many coaching models are research-based
- Individual level impact (ex. brain based) on own learning
- Organizational level: validation of outcomes, often after the fact
- Reporting back on benefits
- Coaching benefits can encourage a prospective buyer to purchase
- Educate those who purchase coaching services and selection process
- Educate coaches on how to match coachees and coaches
- Educate coaches on what methods are more effective
- Development of coaching as a profession
- How does the "science" inform the "art" and vice versa?
- Science - foundation which allows the art to emerge
- Science informs structure of work: where do we start?
- When you need to make the case for coaching
- With the champion (influencer)
- Hi-potentials / sophisticated consumers
- Outcomes of each engagement
- Never inappropriate to have data
- Stories work better for some
- Inference or impact at organizational level
- Big surveys (Sherpa, ICF) can be helpful
- Need more: better = to build the profession/field
- Coach training - university level
- Heading for licensing
- International