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Executive Coaching Summit I: Documenting the Emerging Field of Coaching in Organizations

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The Coaching Summit

Executive Coaching Summit I: Documenting the Emerging Field of Coaching in Organizations

Executive Coaching, as a distinct specialty within the practice of Coaching in Organizations, expanded during the 90's in such a rapid and broad way, that its senior practitioners felt the need to stop and reflect on their practice even as it was developing. Some of the best Executive Coaches in the country, people driven by an attitude of intellectual rigor and curiosity mixed with generosity and passion, came together to outline the common fundamentals of their work. The resulting 1999 White Paper has remained the most succinct and systematic description of the parameters that define Executive Coaching to date.

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Summary Findings From The International Executive Coaching Summit: A Collaborative Effort to Distinguish the Profession

**Sponsored by the International Coaching Federation Conference
ICF Conference - October 1999, Orlando, Florida
Compiled by: Dr. Lee Smith and Dr. Jeannine Sandstrom
CoachWorks International, Dallas, Texas**

This article represents key findings, definitions and discoveries about the profession of Executive Coaching. A group of 36 Senior Executive Coaches (see complete listing at end of this paper), thought leaders in the field, met for the purpose of identifying the primary distinguishers of Executive Coaching. This paper is written for the benefit of the following primary audiences: individuals calling themselves Executive Coaches, other coaches of the ICF membership, those coaches who aspire to work at the executive coach level, organizations wishing to hire Executive Coaches, organizations desiring to initiate a coaching culture as a strategic device for retaining talent, coach training organizations and other professional coach organizations.

The following areas are covered: Need for such an effort, identifying the basic level of competence in all coaches, definition of Executive Coaching, primary distinguishers, competencies and proficiencies, strategic rationale for hiring Executive Coaches,

An Industry Need Filled

Over the past decade of the 20th Century, coaching became a more mature profession and industry. As with other developing professions, participants began to distinguish themselves into specialties and declare the parameters in which they offer services and employment. There are many types of coaches (e.g., sports coaches, personal coaches, business coaches, spiritual coaches, life coaches are among the myriad of different titles coaches have claimed). Consequently, there was confusion about the Coaches who are engaged to work with leaders and executives of major organizations. For industry purposes, there needed to be a way to distinguish Executive Coaches from other types of coaches. There was a strong need to answer the question "What is an Executive Coach?" There was also a need to determine the appropriateness of the title and the primary factors for which such coaches are capable of providing services at such high and broadly impactful levels of responsibility in organizations.

Laura Whitworth, co-founder of The Coaches Training Institute, declared in early 1999 a need for a clear distinction around the specialty area of coaching that is called Executive Coaching. Since there was a growing demand for Executive Coaches by companies and organizations, Whitworth had a dream of fully distinguishing capabilities and parameters so that industry could contract with the right coach for their top corporate talent. Engaging a small committee of well-known executive coaches and thought leaders in the field, she joined with Dr. Lee Smith and Dr. Jeannine Sandstrom of CoachWorks International, and Leslie Clark and Lauren Powers to bring together an alliance of seasoned executive coaching leaders to discuss such distinctions.

This small group caught the spirit of Whitworth's dream and became determined to have an International Executive Coaching Summit. They gained the sponsorship of the International Coaching Federation, an organization dedicated to the development, support and integrity of the coaching profession. Their leaders agreed that such a Summit would align with its own quest for professionalism of coaches worldwide and were willing to sponsor such an event at their October 1999 International Coaching Federation Conference in Orlando, Florida.

More than 100 leading Executive Coaches responded to an invitation to apply for participation in the two-day Summit. The 36 who participated (see list of participants at end of the paper) were those applicants having the most extensive experience in the field and who were also being contracted to coach at the highest level of executive responsibility. The committee was determined to have those coaches who have been specifically defining the field to participate in formally distinguishing it.

The desired outcome was to bring a compelling message to industry about the proficiencies, capabilities and ethics of those who would be hired to coach with executive leaders. Another outcome was to be clear about the distinct differences between Executive Coaches and other types of coaches.

The two-day Summit was highly successful with high-energy competitors and leaders in the field dropping their egos at the door to collaborate and create something unusual and much needed for their profession. With the help of two highly experienced facilitators, Dr. Jeannine Sandstrom of CoachWorks and Dr. Phil Drouillard of Sibson, this collaborative meeting of peers and colleagues resulted in definitions, findings and discoveries that would bring understanding of the Executive Coaching field to industry as a whole. The following sections of this paper explore the findings of the Summit.

Discoveries and Findings

The Dilemma: The Basic Level of Competence in All Coaches

As the Summit participants began listing all the things that Executive Coaches do and what Executive Coaching is, there was a realization that the list related to characteristics of all coaches. This discovery led to awareness that there is a basic level of coaching competence that should be obvious in everyone who delivers coaching services whether they operate as personal coaches or Executive Coaches. All coaches should have proficiencies in listening, creating an environment for change, facilitating self-awareness, etc., and should be able to work with personal, professional, and perhaps organizational issues about which their clients want focus.

The dilemma for Summit participants became that of identifying characteristics that set Executive Coaches apart from all others. Distinguishers such as business acumen, understanding the world of leaders, and having a proficiency in systems and organizational behavior would then become a way for organizations to quickly identify appropriate internal and external coaches. Distinguishing factors were those that would serve executives best. As described below, it was important for Summit participants to fully define Executive Coaching for the marketplace.

The Definition of Executive Coaching

The 36 participants agreed to the following definition of Executive Coaching:

Executive Coaching is a facilitative one-to-one, mutually designed relationship between a professional coach and a key contributor who has a powerful position in the organization. This relationship occurs in areas of business, government, not-for-profit, and educational organizations where there are multiple stakeholders and organizational sponsorship for the coach or coaching group. The coaching is contracted for the benefit of a client who is accountable for highly complex decisions with wide scope of impact on the organization and industry as a whole. The focus of the coaching is usually focused on organizational performance or development, but may also have a personal component as well. The results produced from this relationship are observable and measurable, commensurate with the requirements the organization has for the performance of the person being coached.

Quick Points of the Definition

- A relationship exists between Coach and high-level individual(s) of the organization.
- The relationship occurs in and is sponsored by differing kinds of organizations with multiple stakeholders.
- Coaching is for the benefit of a person with high levels of responsibility and broad scope of impact.
- Focus of the coaching may be both organizational and personal development.
- Outcomes are observable and measurable, and match organizational performance requirements.

Primary Distinguishers for the Profession of Executive Coaching and Executive Coaches

The primary distinguishers of Executive Coaching and its Executive Coaches revolve around a definition of the person being coached, the wide range of responsibilities for which they are held accountable, the breadth and depth of skills that are demanded in their high-level roles, and who the Executive Coach needs to be with their levels of proficiencies and capacities in order to serve as the developer and change agent at those levels.

Description of the Executive Leader Being Coached

Broadband responsibility and impact of the executive being coached:

- Fiduciary responsibility to multiple stakeholders
- Stewardship of human, financial, intellectual, capital and social resources for the benefit of all stakeholders
- Economic, social and ecological well-being of entire communities

Executives want to be coached around a complex combination of skills and human capacities that are required of their role(s) in the organization, such as:

- Business acumen and financial management
- Leadership and organizational skills
- Social and communication skills
- Analytic and innovative thinking capacities
- Ability to inspire trust and commitment to action
- Rewards and acknowledgement
- "Presence" that allows them to work in a very large arena or overlapping arenas

Distinguishing Characteristics of The Executive Coach

In order to be an effective resource for the executive's development, Executive Coaches must possess a unique combination of maturity, professional skills and human qualities, such as:

- A firm grounding in business knowledge and competencies
- Thorough understanding of the world of the executive leader
- A broad understanding of leadership and leadership development
- Knowledge of systems dynamics (organization and community)
- Knowledge of the framework of adult development
- High standards of personal and professional ethics
- Highly developed communication proficiency allowing them to operate in the executive's environment
- Advanced coaching skills and capabilities
- Stature and reputation that gains respect
- A commitment to lifelong learning similar to the leader him/herself

Competencies, Proficiencies and Interpersonal Characteristics Of the Executive Coach

Corporate organizations are seeking qualified Executive Coaches but many do not know what characteristics and proficiencies to request. They also have not had any distinguishing guidelines previous to this paper to use in determining what kind of coach their executives need.

The following is a listing of the basic proficiencies followed by the distinguishing qualifications required of an Executive Coach:

Basic Coaching Competencies (as specified by ICF Credentialing)

The Executive Coach possesses the following eleven competencies that should always be present and visible in any coaching interaction:

- Meet ethical guidelines of the profession
- Ability to establish a coaching agreement
- Ability to establish an intimate and trusting relationship with the client
- Ability to be fully present, conscious and spontaneous
- Ability to express active listening
- Ability to ask powerful questions
- Ability to be a direct communicator
- Ability to create and raise the client's awareness
- Ability to design and create action plans and action behaviors
- Ability to develop plans and establish goals with the client
- Ability to manage the client's progress and hold him/her responsible for action

Advanced Executive Coaching Proficiencies

Executive Coaches work beyond the basics of coaching (as listed above) with a very complex group of proficiencies. Their levels of expertise encompass broad-band skills and defining intervention abilities. In fact, Executive Coaches must be able to operate on an equal level, (i.e., peer) with the executive with whom they coach.

The following are the advanced proficiencies identified by the Summit participants:

- Ability to ask the tough, strategic questions because the Coach possesses a wide range of business knowledge, experience and expertise. The Executive Coach may, at times, use the "coach approach" to consult the executive in the area(s) that the Coach holds

business expertise.

- Holds a high level of confidence in working within the leadership arena. Executive Coaches are thoroughly familiar and comfortable with the executive leader's world (context, roles and hierarchy) and has a thorough working knowledge of leadership and leadership development.
- Ability to have conversations beyond the obvious. May include global issues, philosophical items, sociological issues or business issues of the day and future. Executive Coaches are comfortable coaching around complex issues and international agendas.
- Ability to recognize and intervene in the system dynamics to maximize performance and structure. This requires that the Coach be able to discern the patterns of behavior and larger scale systems that prohibit peak performance. This is particularly true when working with the executive and his/her team(s).
- Ability to be a risk taker by challenging individuals at high levels. Executive Coaches speak the truth when no one else will.
- Holds great respect for and knowledge about multi-cultural issues that enhance the executives' international business focus.
- Ability to articulate adult developmental theory and deliver information about how the executive compares with what he/she needs to be and do.
- Ability to be highly innovative, creative and collaborative. Consequently, serves as a strategic partner to the executive leader and his/her team.
- Ability to be a confidante in which executives are able to share all sides of themselves; their hopes as well as their fears, their egotistical wants as well as their social needs, their dreams for themselves as well as their organizations.
- Holds highly developed coaching, communication, and interpersonal skills and competencies that allow the Executive Coach to operate confidently in both the social and business environment of the executive leader.
- Ability to inspire others at the highest levels. The Executive Coach is truly the one who inspires the inspirational leaders.
- Ability to hold all things in confidence and operate out of highly evolved ethical procedures and conduct.

Interpersonal Characteristics that Industry Seeks

In addition to proficiencies listed above, organizations look for specific characteristics *beyond the obvious*, such as:

- Companies look for an Executive Coach who can be an insightful sounding board while holding sacred the confidences.
- They look for an experienced conversation partner who is a good match (i.e., where there is a strong connection between Coach and client). However, they want a Coach who is different enough to bring about intervention, innovation and creativity to awareness.
- They want someone who can work beneath the strong ego of the leader and who will challenge him/her to raise standards in all areas.
- They require someone who is dedicated to having the executive accomplish the agreed upon outcomes (e.g., increased productivity, increased effectiveness, shifts in leadership approach, increased organizational benefits).
- They need someone who has “been there” and who understands through their own analytical and intuitive hunches what the organization and client issues are.
- Executives want a Coach who will give strong objective feedback in a non-judgmental manner.
- Executives are looking for someone who will model processes and vision for them until they can model such things themselves. The Executive Coach actually holds the vision of the outcome while having the executive be accountable for advancing toward goals.

Strategic Rationale for Hiring Executive Coaches

There are many reasons that companies consider hiring Executive Coaches versus another type of coach. The participants of the Summit captured the primary reasons in the following listing:

Strategic Leadership Development

- Their executive has requested a Coach who serves as a sounding board for strategy, particularly when the marketplace has changed.
- Their executives and executive teams need strategic leadership development and skills.
- They are conducting 360-degree feedback assessments and want Executive Coaches to deliver feedback and conduct follow-on coaching. They often want the Executive Coach to provide a model for the executive to

deliver 360 feedback to his/her director reports.

- Their executive needs to raise standards of performance so the company can stay competitive in the marketplace.

Implementation of Strategic Goals

- They want coaching for implementing their strategic initiatives and goals.

Team Coaching

- They want coaching for executive teams so that the teams can lead the company in a cohesive yet innovative and collaborative manner.

Derailment

- An executive is on a derailment path and needs a major shift or retrofit to stay in the game.

Assimilation Coaching

- A new leader needs assimilation coaching into the culture to assert his/her leadership into the organization.

Succession Planning

- They want help with developing succession planning of appropriate replacement personnel.
- They want coaching for retiring or mobile leaders to design the next stage of life.

Career Development

- They want their executives to have career development coaching.

Measurable Accountabilities

- They want tools of measurement as well as observable results.

Personal Coaching

- At times the executive him/herself wants personal coaching.

Tools of the Executive Coach

To accomplish the items listed above, the Executive Coach brings a wealth of tools to use in coaching and intervention within the organization and the world of the executive leader. The Summit participants concluded that, in addition to those items listed below, the greatest and best tool being brought to the relationship is the Executive Coach himself or herself. Executive Coaches are aware of the possibilities and profound impact they have on individuals, organizations and communities. Concomitantly, they are aware of their own development

and have a positive intention of growing and learning along with the person(s) being coached. In essence, the Executive Coach is a tool that organizations use to impact for the greater good of their workplace.

Listed below are the primary tools employed by most Executive Coaches:

Assessments for Conducting Gap Analyses

- Initial interviews that determine current situation, future goals, what is missing, background of strategic plan, mission statement, financials, etc.

Outcome Measurements

- Scorecards for accountabilities
- Pre/Post assessments to measure results such as 360 degree feedback for individuals and teams, team effectiveness
- Measuring progress in terms of political acumen, being well read, personal courage, facilitation of teams, tasking for practice, stakeholder management, intellectual/intuitive awareness of the bigger picture, global-multicultural capabilities, personal and professional successes (e.g., networking, sales/marketing, and business/operational skills)

Processes

- Processes for conducting business in more effective manner such as determining vision, modeling values, discerning authority, decision-making, effective meetings, handling conflict and disagreement, creating innovative methods.

Customizable Tools

- 360 degree feedback with outcome of Professional Development Plan
- Self-assessment tools such as developmental history, wheel of balance
- Facilitated conversations and shadow coaching
- Role playing, homework assignments such as reading and practice
- Powerful questions, requests and use of stories and metaphors
- Technological tools such as coaching simulator, audio tools, email and voice mail coaching

Trends in Executive Coaching

As the requests grow for Executive Coaching at high levels of organizations, we are beginning to see trends emerge that predict the potential longevity of the Executive Coaching profession and industry. The Summit participants reported the following trends of which they are aware.

Coaching for the Executive

- Executive coaching is becoming a perk in executive benefit packages.
- Executives are able to spend little time in training venues, but consider the coaching to be “just in time” learning. They distinguish this from training, which is “just in case.”
- Executive Coaching legitimizes working on the interaction between life stages and demands of role in the life of the leader.
- Executive Coaches may also address balance, wholeness and community within the executive arena.

Inclusion in Academic Programs

- Executive MBA programs have begun to consider the issue of the Executive Coach in the mix of possibilities, with coach training as a part of learning.

Human Resources Trends

- More and more, Human Resource executives are required to possess coaching competencies.
- Human Resource executives are expected to have access to available Executive Coaching resources.
- Since there’s a trend in Human Resources to do more web-based learning, Executive Coaching fills the gap for face-to-face and team real time learning.
- Executive Coaches contribute to an organization’s advantage in the talent war and increase the likelihood of high attraction, retention and motivation.

Remuneration of External Executive Coaches

- External Executive Coaches have a vested interest in having the coaching initiative be successful. This vested interest is often represented by agreeing to receive part of their remuneration in the form of stock options.

Executive Coaches

- Executive Coaches are expected to have a network of excellent resources to refer to their clients and clients companies. These are typically specialists in complementary areas to coaching.
- Executive Coaches are expected to be able to work with a variety of learning styles in individuals and a variety of electronic/ interactive media.
- Results-based project proposals and contracts are gaining in preference over hourly arrangements.
- The credibility of Executive Coaches is growing in sync with the demand by organizations for certifications, proven track records and strong references.

Impact On Society

- By being responsible and acting with integrity and ethical parameters, Executive Coaches make an impact on society as a whole because they coach with individuals and teams who have a wide scope of impact on the world.

Ethics of the Executive Coach

Executive Coaches follow the basic ethical guidelines held by all other coaches. You may find the International Coach Federation Ethical Guidelines for Coaches on the website at www.coachfederation.org. However, in addition to the basics, Executive Coaches must adhere to a set of primary ethical parameters that address the very essence of the world in which they coach.

Summit participants identified the following list of ethical guidelines not identified otherwise for Executive Coaches:

Confidentiality

- Executive Coaches hold inviolate “insider” information (financial, market strategy, product information). Non-disclosure agreements are often required. If not, the Executive Coach should provide one.
- Confidentiality is a negotiated up-front contractual agreement between the executive, his/her boss, the sponsor and the Executive Coach.
- Special situations will be discussed in the contractual agreement regarding confidentiality. When the Executive Coach discerns the “at risk” executive or “at risk” system (e.g., addictions, harassment, etc.), he/she will

involve the sponsoring individual in how best to approach such a critical situation.

The System of Coaches

- The Executive Coach will determine where other Coaches are being used in the system of the organization in order to communicate and align the strategic efforts.

Dedication to Outcomes

- Executive Coaches are dedicated to having measurable outcomes. Goals are established in the contracting phase so that both the performance of the Coach and the executive can be observed and measured.
- Executive Coaches provide means for measuring the results and outcomes.

Encouraging Systemic Support of Gaining Results

- Successful Executive Coaching rarely sustains its results if the system, the teams and the stakeholders of the individual aren't involved in supporting the process. It is the ethical responsibility of the Executive Coach to encourage the executive to gain support from others for his/her results. Since the Coach maintains confidentiality, involvement in seeking support should be driven by the executive.
- When a whole team is the client, the same encouragement applies regarding the team's relationship with the rest of the organization. As coached to do so, the team determines how to interact and share its issues and progress with its stakeholders.

Summary of Findings

This very unusual community of collaborative senior Executive Coaches discovered and created some extraordinary information about their industry. They gained a clear definition of Executive Coaching. This was done by not only discerning what is basic to their operation, but also discovered the unique distinguishers that describe their complex work world and the scope of their impact on organizational culture, as well as on society as a whole.

Summit participants delineated what they know to be the competencies, proficiencies and interpersonal characteristics that “world class” Executive Coaches possess and those that industry is currently seeking. The participants also discovered strategic reasons that Executive Coaching is requested by organizations. Other considerations were the understanding of current trends in the profession as well as critical ethical factors held by the Executive Coach.

Major conclusions of the Summit were the following:

- There exists a strong need for definition of the Executive Coaching world.
- There is much complexity in the world of Executive Coaching because of the scope of impact and responsibility that the executive client, key contributors and associated systems bring to the relationship.
- The Executive Coach must be working in this arena as familiar territory, being seasoned both from experience as well as from the social aspect.

Additional work is to be done on an ongoing basis. Future Executive Coaching Summits will address issues such as typical results from a coaching intervention, research about measurable outcomes, global impact(s), technological advances and continued identification of advanced ethics.

Added value in this experience is that the 36 participants are committed to maintaining the community that was formed in the two days and add others to continue to grow and develop the understanding and utilization of Executive Coaches.

International Executive Coaching Summit Esteemed Participants

The following is a listing of the Executive Coaches who participated in the International Executive Coaching Summit and from whom this information was produced:

Sue Bethanis, Sean Brawley, Cecile Burzynski, Leslie Clark, Jane Creswell, Phil Drouillard, Alexis Brown Falek, Tim Gallwey, Harris Ginsberg, Elizabeth Guilday, Linda Hall, Mike Jay, Bob Johnson, Stephen Josephs, Ray Lamb, Steve Lishansky, Niki McCuiston, DJ Mitsch, Agnes Mura, Cynder Niemela, Barbara Parton, Lauren Powers, Jeremy Robinson, Phillippe Rosinski, Wanda Ross, Jeannine Sandstrom, Cliff Schelling, Andrea Sigetich, Lee Smith, Gary Taylor, Keith Thompson, John Vercelli, Karol Wasylskyn, Laura Whitworth, Ellen Wingard and Linda Yort

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