

# Designing a world-class executive coaching program

David B. Peterson, PhD

Director, Google Center of Expertise,  
Exec Coaching & Leader Development

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# Agenda

Key principles

History and context

Four design elements

1. Who gets coaching and why?
2. Who provides coaching?
3. What programs & process?
4. How do you measure, evaluate, and improve the impact & value?

## \* \* \* Your assignment \* \* \*

Make notes on most significant implications for you personally and for:

- Executive coaches who want to provide greater value to organizational clients
- Managers of coaching programs

# History and context

1. How can we make development faster, better, more rewarding for people and organizations? [Leader as Coach, Development FIRST, Development Pipeline, GAPS Grid]
2. What's the future of coaching and leadership development?
3. How do we help leaders thrive in complexity, chaos, and disruption? [DNA of VUCA + Reflection + Community; Decision-making in complexity & change]
4. How can coaches prepare for a disruptive future? [7 Paths Forward, Foundations of Great Coaching with WBECS this fall]
5. How can organizations drive greater value through coaching and leader development?

# Key principles for designing world-class coaching

1. Clarify purpose and design to that purpose
2. Customize to your organization and culture
3. Customize to the individual
4. Focus on systemic organizational value and impact
5. Set high standards and clear expectations for principled behavior

You have come to the shore.

There are no instructions.

— Denise Levertov —

*Mission & Strategy guides a forward thinking, high-quality, high-touch and scalable portfolio strategy.*

*Example for illustrative purposes only*

**Mission:** Accelerate development of leadership talent through great coaching and tailored experiences to meet current and future needs

**Strategy:** Build, develop and scale a **portfolio** of exceptional coaching resources for the greatest benefit to employees and the enterprise

**Ensure a high-quality portfolio of coaching resources that balances scale and customization**

- Deploy the right blend of best-in-class external coaches and internal professional coaches
- Strategically align with and support other internal coaching resources (internal coaches, gurus, mentors)
- Enhance coaching capabilities across the entire portfolio of internal coaching providers, including gurus, advisors, and HRBPs

**Target investments to generate the greatest impact**

- Manage our investments judiciously to accelerate development for key talent segments, in alignment with organizational needs and priorities, talent reviews and other HR processes
- Design and implement top-quality coaching engagements that raise the bar to ensure greatest impact for individuals and the org
- Anticipate emerging needs and proactively engage to serve target audiences

**Increase quality, efficiency, and alignment across all coaching programs and initiatives**

- Streamline and automate processes for selecting/managing coaches, tracking/reporting, billing/invoicing, and evaluation
- Utilize quantitative data and qualitative insights to drive greater impact

**Continually drive and challenge ourselves to advance the leading edge of thinking and practice**

- Pursue ways to make coaching more transformational and deliver greater impact more quickly
- Leverage innovations in technology to enhance value of coaching

# Evolution of a coaching program

Example for illustrative purposes only

## Chapter 1 Clarity and Consistency

*Ad Hoc → Defrag*

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Understand current offerings & participation

Build trust with partners

Craft vision and mission

Improve support, responsiveness, quality, consistency

Build v1 Infrastructure



## Chapter 2 Customization, Platforms, & Portfolio

*Uncoordinated & under-leveraged → Customized portfolio*

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Align/coordinate with partners to manage all coaching

Expand coach portfolio

Partner with HRBPs

Optimize infrastructure & tools



## Chapter 3 Proactive, Strategic, Enhanced

*Siloed → Strategic impact, deeper insights*

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Scale and optimize coach portfolio

Support a culture of coaching & development

Align with and help drive strategic talent & leadership dev priorities

Serve as talent & development consultants



## Chapter 4 Customized, On Demand, Transformational

*Great coaching experiences → Transformational coaching with tangible organizational impact*

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Leverage data and insights to provide targeted and predictive development across career lifecycle

Expand portfolio of offerings to address emerging needs

Build coach capabilities to provide transformational impact

Invest in partners to ensure the most effective use of coaching



# Continually innovate and adapt coaching processes to better fit culture and needs.

*Example for illustrative purposes only*

<b>Our approach to coaching</b>	<b>Other approaches</b>
<ul style="list-style-type: none"><li>Manage all aspects in-house to ensure the best approach for all participants</li></ul>	<ul style="list-style-type: none"><li>Manage coaching through external networks or consulting firms</li></ul>
<ul style="list-style-type: none"><li>Tailor each engagement -- in scope, length, design, and coach -- to the participant's needs and situation</li></ul>	<ul style="list-style-type: none"><li>Offer one or two standard programs or off-the-shelf packages</li></ul>
<ul style="list-style-type: none"><li>Ensure a scalable portfolio to provide the most effective, efficient and accessible resource for the need</li></ul>	<ul style="list-style-type: none"><li>Typically have just one or two types of coaching programs and providers</li></ul>
<ul style="list-style-type: none"><li>Integrate coaching services into talent and people development systems (talent reviews, onboarding, exec dev, manager dev, etc.) for a seamless user experience</li></ul>	<ul style="list-style-type: none"><li>Manage coaching as an independent process or integrated only into specific high-end programs (e.g., senior exec dev programs)</li></ul>
<ul style="list-style-type: none"><li>Design the coaching process to emphasize speed, quality, fit, and impact</li></ul>	<ul style="list-style-type: none"><li>Design primarily for consistency and quality</li></ul>
<ul style="list-style-type: none"><li>Provide coaching to broad population based on specific needs and the potential benefit for that person and the larger org</li></ul>	<ul style="list-style-type: none"><li>Focus exclusively on high-potentials or a discrete group who meet narrow set of criteria</li></ul>

# Coaching supports transformation at the individual & organizational levels.

<b>Individual</b> <b>Support leaders in their own transformation</b>	<b>Organizational</b> <b>Support leaders in leading transformations</b>
<ul style="list-style-type: none"><li>▪ Support development across their career lifecycle - from onboarding, accelerating performance, and navigating key challenges, to major career transitions</li><li>▪ Address key development needs</li><li>▪ Develop insight and self-awareness</li><li>▪ Increase impact and effectiveness</li><li>▪ Enhance adaptability and learning agility</li></ul>	<ul style="list-style-type: none"><li>▪ Reinforce the culture</li><li>▪ Leaders lead organizational change effectively</li><li>▪ Influence multiple leaders in an org in a consistent way</li><li>▪ Leaders build more agile and adaptable organizations at scale</li><li>▪ Leaders inspire and engage their organization</li><li>▪ Develop a culture of coaching &amp; learning</li></ul>

# 1. Who gets coaching and why?

## Five stages of coaching programs

1. Ad hoc - driven by individuals (fix it, high potential) [Incidental]
2. Programmatic - driven by a champion; provide structure [Centralized]
3. Targeted - driven by a business issue (onboarding, organizational change) [Metrics-based]
4. Strategic - driven by talent strategy (succession, talent pools) [Strategic]
5. Optimized - driven by “best” resource for the need [World-class]

# 1. Who gets coaching and why?

## Two key questions

1. If you could only provide coaching to three people in your org, who would that be and why?
2. Where will coaching make the biggest difference to the success of the organization?

# Finding the best use of coaching vs. other options

Urgent, timely need

Unique individual needs or context: onboarding, unique roles, critical projects, complex context

Critical or pivotal talent

Other approaches have not been sufficient

Supplementary support for development programs

## 2. Who provides coaching?

### Types of coaches

1. **Insight and feedback coaches** --- 360 feedback, assessments, therapists, personal/life coaches, career/development planning
2. **Content experts** --- Former managers/leaders, gurus, book authors
3. **Learning process experts** --- The psychology of learning, motivation, habits, behavior change, personality

# Leverage internal and external professional coaches to get the best of both

<b>Internal professional coaches</b>	<b>External coaches</b>
<ul style="list-style-type: none"><li>▪ For company confidential, sensitive, and nuanced issues</li><li>▪ When knowledge of culture, dynamics, and personalities is essential (e.g., onboarding, working across orgs)</li><li>▪ For urgent, just-in-time, or on-demand needs</li><li>▪ To observe leaders in action, e.g., All Hands presentations</li><li>▪ To gather and share themes, insights, and signals from across the org</li><li>▪ For building coaching capabilities in others, e.g., when we coach HRBPs to coach their clients</li></ul>	<ul style="list-style-type: none"><li>▪ For scale and geographic reach</li><li>▪ For unique expertise</li><li>▪ To leverage fit with different personalities and development needs</li><li>▪ Where leader requires an independent confidential resource</li></ul>

# Managing pool of coaches

1. Screening and selection
2. Orientation process
3. Matching
4. Ongoing evaluation and feedback
5. Building community and identity?
6. Training/developing?



# Who provides coaching? Managing the pool of coaches

## 1. Screening and selection

- Capabilities and experience fit to your need
- Culture fit
- Location / modality
- Credibility to your audience (understand their world)
- Ability/willingness to partner

*Requires that you understand organizational needs, culture, and what will be credible to clients, and how to assess coaches against those dimensions.*

# Who provides coaching? Managing the pool of coaches

## 2. Orientation process

- Coaching process
  - How to partner and work with us
  - Confidentiality and communications
  - Program design and expectations
  - HR systems, programs and processes, language, capability models
- Organizational knowledge
  - Senior leaders and key players
  - Culture and values, history
  - Org strategy
  - Org structure

# Who provides coaching? Managing the pool of coaches

## 3. Matching

- Fit with the development need and context
- Not surface factors: demographics or “chemistry”

# Who provides coaching? Managing the pool of coaches

## 4. Ongoing evaluation and feedback

- Two-way communication and sharing: What are they learning about your org, culture, leaders, business challenges?
- Mid-point check-in
- End of engagement survey
- Participant evaluation of coach
- Annual coach reviews

# Who provides coaching? Managing the pool of coaches

## Optional

5. Building sense of community and shared identity among coaches
6. Training/developing – investing in coaches to help them be better coaches and/or more effective in your org

# Capacity analysis: Based on current use and anticipated need

Site [# senior leaders] Based on # FTEs & senior leaders		Professional coaches: Senior level [Target]	Professional coaches: Mid-level	Internal coaches	Leadership Gurus	Other coaching resources
Large Sites	Site 1 [XXX]	XX [+4]	XX [+4]	XX [+4]	XX [+4]	XX [+4]
	Site 2 [XXX]	XX [-4]	XX [+1]	XX [+1]	XX [+1]	XX [+1]
	Site 3 [XXX]	XX [+1]	XX [+1]	XX [-4]	XX [-4]	XX [+10]
Medium Sites	Site 10 [XX]	XX [+1]	XX [+1]	XX [+1]	XX [+1]	X [-2]
	Site 11 [XX]	X [+1]	X [+1]	X [-1]	X [+1]	X [+1]
	Site 12 [XX]	XX [-4]	XX [+4]	XX [+1]	XX [+1]	X [+1]

### 3. What coaching programs & process?

**Standardized or customized?** What degree of customization?

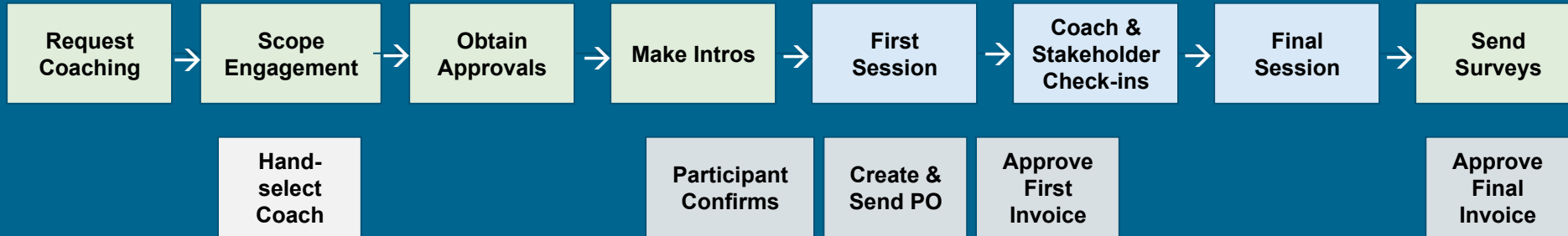
**Communication and touch-points:** Where on the spectrum?

- Autonomy -- partnership?
- Open communication – confidentiality?

**Roles and support:**

- Coach and participant
- Manager, HR, Coaching program manager, etc

# Coaching engagements: Process map

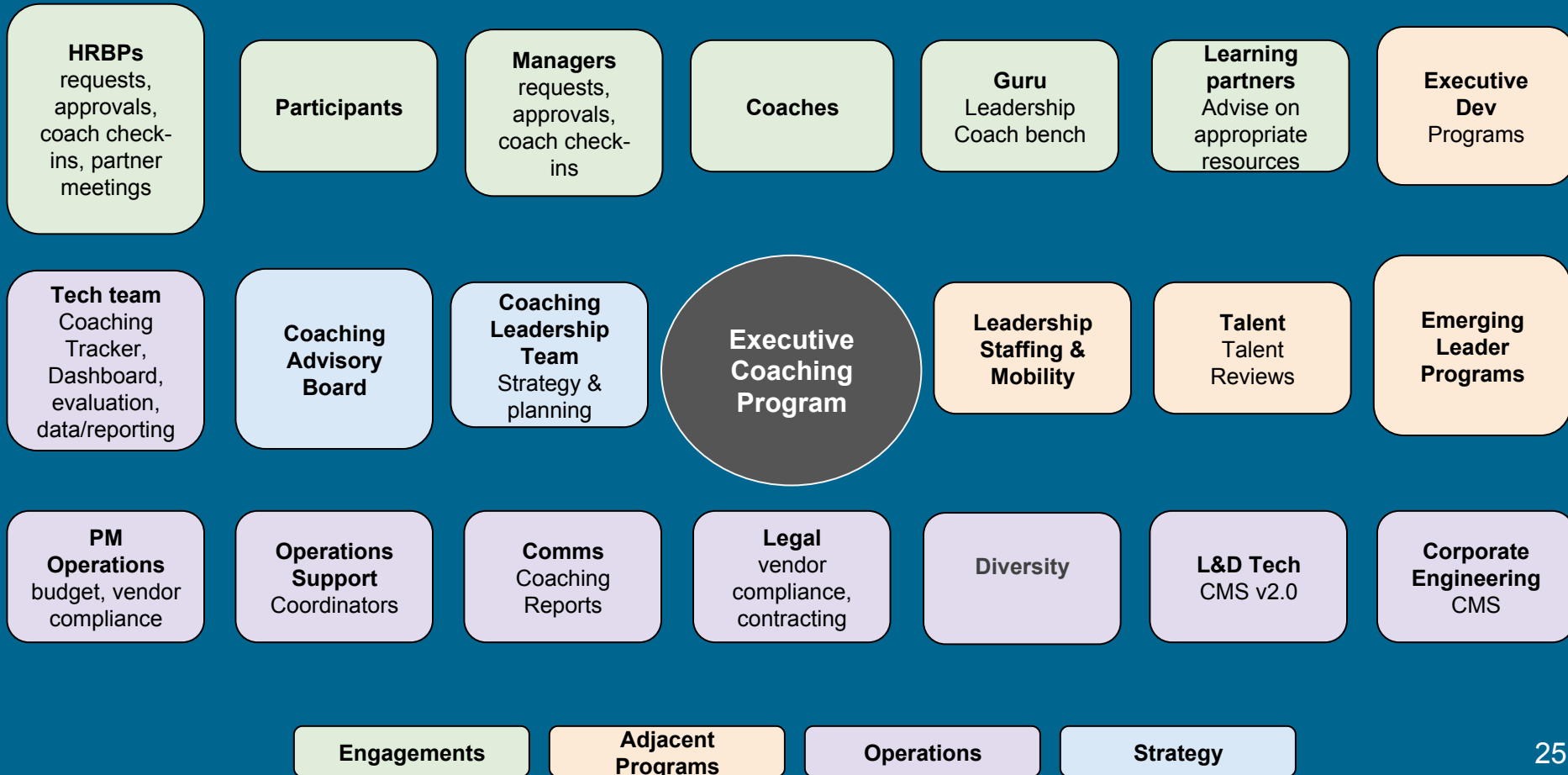


Key stakeholders have distinct roles and responsibilities: Coach, participant, manager, HR, engagement manager



# Key stakeholders

*Example for illustrative purposes only*



# Coaching team priorities

**1. PORTFOLIO:** We provide a portfolio of tailored 1:1 development experiences that is targeted for the greatest impact and nimble enough to meet the ever-changing and complex needs of our leaders.

- Provide core coaching offerings
- Provide and experiment with additional offerings

**2. PARTICIPANTS:** We reach the right talent at the right time to build the leaders we need now and for the future.

- Coaching for the most critical current and emerging leadership talent, as identified by the business and talent teams.

# Coaching team priorities

**3. PROVIDERS:** We have a diverse bench of best-in-class coaches across the globe who have the right capabilities to meet our leaders needs.

- Maintain diverse bench of coaches with the capabilities to meet our leaders' current and future needs in all key locations.
- Leverage experience, learnings, and observations of our coach community to make coaching more effective.
- Support a coaching skills curriculum with a clear pathway for internal coaches to build their coaching capabilities.

# Coaching team priorities

**4. PROCESS:** We simplify and scale wherever possible while maintaining a personal, high-touch, seamless process.

- Streamline our request, coach matching, engagement, and operational processes.
- Strengthen our data methodologies and technologies to meet all data and reporting needs.

# Coaching team priorities

**5. PARTNERSHIPS:** We are trusted consultative experts for clients and business partners, vital collaborators across people operations, and thought leaders in the leadership development space.

- Collaborate across people development org and HR to provide a cohesive and high-impact development experience for leaders.
- Scale internal coaching platform to support and launch peer-to-peer resources.
- Deliver best-in-class program operations in partnership with Comms, Legal, Staffing, other teams.

# Coaching team priorities

**6. EVALUATION, COMMS & REPORTING:** We tell a clear story about who we reach, what they work on, what they learn, and the impact on the business.

- Use quantitative and qualitative data effectively to show our impact.
- Communicate the right information to the right stakeholders at the right times.
- Understand the external market and position ourselves as a leader in the industry.

**7. TECHNOLOGY:** We use technology to enhance development by making it more effective and efficient.

- Pilot current technologies and explore new technologies to enhance coaching (e.g., CoachLogix).

## 4. How do you measure, evaluate, improve?

What purposes are you trying to serve?

- **Evaluate** impact/demonstrate value
- **Improve** process, efficiency, and impact
  - Where are you getting the greatest impact? Which coaches, needs, leaders?
  - How can you streamline or enhance process?
- **Marketing** and PR: Attract participants, generate support

## A minimal foundation for evaluation: Participant version

1. To what extent did you learn something that has tangible value to you, your performance, and/or your organization? [1-5 rating]
2. What specifically did you learn?
3. What is the tangible value?
4. What would improve the coaching process and value?
  - Consider program components, coach, comms/logistics, your role/engagement, timing, supports, etc.



# Data systems, evaluation, & comms

## Coaching Management System (CMS)

Houses all engagement and coach data and serves as the back-end system for our Tracker and Dashboard.

## Coaching Activity Tracker (CAT)

For HR: Current/historical data on all coaching participants

## Coaching Dashboard

For Coaching Team: To monitor and report on program metrics: growth, coach utilization, survey response rates, etc.

**Evaluation Process** → how we evaluate engagement effectiveness:

- End of Engagement Survey sent to Participant, Coach, HRBP, and Manager
- Participant Impact Stories

**Comms Plan** → organized by audience, channel, and frequency:

- **Executive Coaching Site:** Landing page for our program; how to request coaching, criteria, FAQs
- **Coaching Report:** Annual and quarterly summary of utilization and impact
- **Coaching Themes & Insights:** Summary of insights about leaders and the org from coaches

# Annual report: Program overview

## **What's working well:**

- Operational excellence
- Highly customized and scalable processes
- Clear, strategic criteria for coaching participants
- Centralized coach sourcing, vetting, and strong knowledge of our coach bench
- Wide and deep stakeholder relationships and positive reputation
- Demonstrated impact and value

## **What we will continue to improve:**

- Anticipating supply (coaches) and demand (requests) proactively, especially for adjacent programs, e.g., diversity, targeted leader development, high potentials
- Finding more efficient and effective approach to acclimating external coaches to culture, processes, resources, etc. and keeping info current, while respecting confidentiality

# Wrap-up

History and context

Key principles

Four design elements

1. Who gets coaching and why?
2. Who provides coaching?
3. What programs & process?
4. How do you measure, evaluate, and improve the impact & value?

# Your assignment:

## Discuss and identify 2 key takeaways

Most significant implications for you personally and for:

- Executive coaches who want to provide greater value to organizational clients.
- Managers of coaching programs



It is our choices that show  
what we truly are, far more  
than our abilities.  
— J.K. Rowling —