How to Design and Deploy an Internal Coaching Program

A free resource provided in addition to the book Building the Core Competencies of Change: A Guide to Coaching in Organizations. To purchase the book go to: https://www.amazon.com/gp/product/1642252530
Visit Sandi Stewart on linkedin: https://www.linkedin.com/in/sandi-stewart-777558/

When building an internal coaching program where internal and/or external coaches are deployed, the following steps can be used as a guide in designing your program:

1 Identify the mission, purpose, and coaching models

2 Communicate the mission and purpose of the internal coaching program

3 Understand coaching ethics, agreements, and policies

4 Select coaches

5 Engage the client stakeholders

6 Create strategic support materials and consistency across the programs

7 Provide quality control and feedback

8 Measure success

Step 1: Identify the Mission, Purpose, and Coaching Models

An organization will first identify the types of program models that it will offer. This could be Individual-Target, Audience-Target, or Organization-Target. This decision will impact the types of coaches and the systems and processes that will be needed.

1. The main models are Individual-Target, Audience-Target, and Organization-Target. Each model has a different level of impact and scope. As such, the amount of oversight and leadership strategy setting and involvement will vary, depending on which model is used.Here's an overview of the three models:

- The Individual-Target: This model focuses on a single person's performance or a team's performance. It is designed to impact those who are coached during the coaching program. At the same time, the outcome of this type of coaching program model will have an exponential impact on the teams and individuals surrounding the clients.

- The Audience-Target: With this model, there are specific strategic organizational outcomes for targeted groups of individuals within a company. The organization creates a strategic goal for a select group of leaders, managers, or employees. For example, audience targets can include seniority levels in the company related to leadership development competency development, or it could include audiences facing specific issues that would benefit from coaching. This might be high stress caused by a specific organizational change. It could also involve transition audiences, such as new hires or promotion and succession candidates. This model has a broader impact on multiple individuals and/or teams and accomplishes set strategic objectives.

- The Organization-Target: This kind of model is used to carry out overarching, strategic, desired organizational outcomes. Coaching becomes the catalyst to organizational change that helps break down barriers to change and support the complex thinking and learning loop required.Within the model, there may be multiple target populations of individuals and teams that will be involved in creating the desired organizational outcomes. Given this larger view and scope, top leadership is more involved with the coaching program. A CPS or executive who has experience with building a coaching strategy is usually deployed to oversee the model.

For example, if support for large scale transformation is desired, then the Organization-Target coaching will require a CPS who has the expertise to guide the coaching program with a cohort of internal and/or external coaches that have competencies in individual and team coaching.

If the organization seeks to achieve targeted population outcomes such as leadership development and/or optimization, skill development, or team optimization and development, then a Coaching Program Manager would be needed to oversee the strategic process of determining what outcomes the organization desires, the types of coaches needed, and the systems for deployment. The Individual-Target program model would have a manager that is primarily responsible for deploying different coaches for the requests from leaders and staff.

An organization may choose to run different models at the same time. They could pull from the same cohort of coaches as they are needed for the different assignments. For example, some organizations have Community Coaching programs. These address various transitions, while also maintaining an Individual-Target coaching program to serve requests as needed.

Step 2. Communicate the Mission and Purpose of the Internal Coaching Program

It is important for the internal coaching operation to communicate the strategy and use of coaching within the organization. This enables the coaching services to be used effectively. Historically, organizations have established internal coaches without articulating how the resources should be used. If leaders don't understand what coaching is or how to use it, there is either a sparse deployment or misuse of the resource.

These communications also ensure that antiquated views of coaching are addressed. In the past, coaching was viewed as a consequence for bad performance. The concept of being "counseled out" of the organization may be confused with current day use of coaching as an investment in the growth of the coaches.

Communications on the fundamentals of the program should be consistent and clear to senior leaders. The communication should include:

- Who the coaches are and how they are trained
- How to request and deploy coaching for what purposes
- Policies and procedures, including how to deploy and work with coaches, confidentiality, supervisor involvement for individual coaching, and CPS engagement for strategic initiatives.

Communications to non-leaders should convey the purpose and mission of the program. They should indicate the nature of coaching so that if a supervisor asks a report to engage with a coach, the potential client understands that it is a development opportunity and not a consequence.

Step 3. Understand Coaching Ethics, Agreements, and Policies

Internal coaching programs have ethics statements and policies that govern the coaching implementation. Certified coaches with the major coaching organizations adopt ethical principles when they are certified. The ICF's code of ethics (coachingfederation.org/ethics/code-of-ethics) is a gold standard for the coaching industry and maintains an Independent Review Board that reviews complaints by coaches and clients who are certified by ICF. Because internal coaches engage with multiple individuals inside and organization, special attention must be paid to how they navigate key areas such as confidentiality.

Another challenge for the internal coach is the possibility that the coach may have competing interests with the client. Competing interests occur when the coach may carry a vested interest in the outcomes of the coaching and sway the client's conclusions and choices. For example, a part-time coach who is from the manufacturing department may be coaching a marketing executive grappling with whether to defund a product line. That product line could be the primary area of work for the part-time coach in his manufacturing job. Defunding that product could lead to layoffs and negative consequences for the part-time coach. This conflict of interest may prevent the coach from being unbiased in the coaching conversation.

Other conflicts could come into play when coaches discuss difficult relationships with others in the organization and the coach has some of the relationships themselves. They may find it difficult to hear what they perceive to be misperceptions with the individual. They could be drawn into sharing their opinions and recommendations with a biased approach.

Mitigating interference in the coaching from competing interests or positional power rely much upon the integrity of the coach. It is hard to change the concern of the client even if the coach pledges they won't use their position or business role inappropriately. These potential concerns should be a topic of conversation in launching the coaching about how best to handle if this will be an issue for the client. The coach needs to ask the client to express what concerns they have at the beginning of the relationship and create an environment where the client feels they can bring these issues forward later in the engagement.

These confidentiality principles extend to internal coaches working with teams. It should be clear to the team and team leader what conversations between team members stay in the room. If an internal coach is facilitating a team, it will be important that they share with any limitations that exist on containing what is shared in the room.

Some components of a coach/client agreement to be signed by both parties may include items found in the following sample agreement:

Sample Coaching Contract Between Client and Coach

Coaching Agreement

1. Coaching is a client/coach partnership to facilitate the development of the Client's personal, professional, or business goals, and to plan and provide support for achieving those goals. It is a comprehensive process that may involve areas of life beyond work, business, or leadership issues and may touch on patterns impacting success in other areas including health, relationships, education, and recreation, as appropriately serves the Client.

2. The Client understands that the Coach's processes and program materials are proprietary information and agrees not to disclose or use said information for purposes or business without the permission of the Coach.

3. The Coach respects the Client's right to privacy. Coach agrees to maintain verbal and written confidentiality of all Client information unless permission is received from the Client, except as required by law. The Coach will only break confidentiality if there is concern that the Client threatens harm to themselves or others. Client agrees to have only name, contact information, and start and end dates of coaching shared with ICF staff members and/or other parties involved in the certification process for the sole purpose of verifying the coaching relationship; no personal notes will be shared. According to the ethics of the coaching profession, topics may be anonymously and hypothetically shared with other coaching professionals for training, supervision, mentoring, evaluation, to further coach professional development and/or consultation purposes.

4. Coach upholds ethical guidelines set forth by the International Coach Federation (ICF). Client signature below indicates understanding of the nature of coaching as defined by the ICF and Client's rights in alignment with the ICF philosophy and ethical standards of coaching as found at: https://coachfederation.org/code-of-ethics.

5. Client assumes full responsibility for results and outcomes produced from the coaching relationship.

6. The Client understands that coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care, or substance abuse treatment and Client will not use it in place of any form of diagnosis, treatment, or therapy.

7. The Client understands that coaching is not consulting. The Coach will not provide solutions, advice, counsel, or directive guidance; however, the Coach may offer ideas, options, suggestions, insights, observations, feedback, or strategies for the Client's consideration and the Client always has ultimate responsibility for his or her choices, decision, actions, plans, and behavior. Client will seek independent professional guidance for legal, medical, financial, business, or other matters. Client understands that all decisions in these areas are exclusively the Client's decisions and acknowledges that the Client's actions regarding them are the Client's sole responsibility.

8. The cancellation policy requires 24-hour notice of cancellation or the session will be charged.Termination of the coaching by either party will be conducted in writing with two weeks' notice.

Program Design can help internal coaches avoid some of the difficulties caused by confidentiality, positional power, and competing interests. If the program is designed and communicated as a development program rather than a problem-resolution program, then there is often a presumption that the client is in a positive upward trajectory rather than mitigating issues or insufficiencies.

This design is realized both through the communication of the program as well as what expectations are set between the organization/sponsor and client. The sponsor should not use the coaching program as a method to communicate deficiencies to their employee. Rather, the coach is brought in to support client growth.

Step 4. Select Coaches

Internal coaching programs may be designed to include both internal and external coaches. Some use outside Coach Scaling Organizations.[1] There can be diversity in the types of internal coaches as some may be full time coaches or some may be individuals playing two roles for the organization. They might carry out their usual job and be on call as a coach. In either case, it is important for the coaching program leader to determine when each type of coach is appropriate for the assignment at hand.

The quality of the coach is significant as well. Unfortunately, many consultants, technical experts, and other individuals call themselves coaches. They are not schooled in the actual competencies or structures of coaching.

Since the maturation of the industry in the past two decades, it is easy for those who hire coaches to assess if a coach is legitimate. When considering who to hire as a coach, the training, certification, and hours of experience coaching individuals and teams should be taken into consideration. Coaches should not be promoted as coaches if they have not been trained and certified by a major training organization. The International Coaching Federation (ICF) retains a list of certified coaches and accredited training institutions that can ensure quality coaching standards. These coaches also commit to the ICF code of ethics once certified. If an organization is starting an internal coaching program using employees, these individuals should become certified coaches before engaging with clients.

For an organization also running a mentorship or training program, it will be essential to make a distinction between individuals who are coaching, mentoring, or training. Some individuals may play two or more roles while also coaching. The individual who holds different roles should be clear when acting as one or the other. A coach may engage in mentorship or training; however, the client will depend upon that person to be clear when they are acting in a particular role.

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1. *A coach-scaling organization is an organization that provides external coaches at scale to organizations by vetting a roster of coaches that the client organization can access. They have a technology system that tracks the coaching engagements. Some CSOs also provide a strategic consulting approach at the design phase of a coaching engagement.*

This becomes particularly important when the coach moves from giving advice (mentorship) to empowering the client's thinking to find solutions (coaching). If the coach defaults to advice, the client may start to default to mentee. The client could then fail to develop the empowered thinking that coaches seek in their coaching relationships.

Step 5. Engage the Client Stakeholders

For an organization to best support both their organizational and client goals, they can use alignment techniques. These protect client confidentiality within their coaching conversations and relationship. They also create some confidence that the coaching is aligned with their overall coaching strategy. The alignment meeting between the coach, client, and sponsor is an effective way to accomplish these goals.

Step 6. Create Strategic Support Materials and Consistency Across the Program

A strategic approach to coaching program materials development requires a thoughtful evaluation of the desired organizational outcomes. This includes Individual-Target, Audience-Target, and Organization-Target programs. Support materials for coaching programs include both the contracting elements and the developmental elements for individual coaching and team coaching.

By creating a portfolio of tools for use across the organization, there will be consistency. This can be seen both in the administration of the diverse coaching programs and as organizational definitions of expected leadership and team competencies.

In all coaching programs, there should also be consistency around the logistics of client intake, coach/client introduction, sponsor engagement, and development plans. For Individual-Target coaching programs, where coaching is assigned on request, the program logistics would include the criteria for accepting the request. Criteria might also encompass the level or type of employee that would qualify for coaching, what type or quality of coach, and any limitations on the coaching engagement length, developmental expectations, and supervisor alignment.

For Audience-Target coaching programs, there may be a population of employee that qualifies for the coaching. The selection and intake would include these criteria. Organization-Target coaching logistics are tailored to the strategic initiative that is being supported.

Content materials for the Individual-Target coaching programs that arise from client requests would be tailored by the coach for the client. However, if the organization has developmental materials used in trainings or other Audience-Target Coaching programs, these should be part of the portfolio of materials available to the coach and client. In Audience-Target Coaching programs, the targeted population will be aligned to specific outcomes and therefore relevant materials would be used across that population to maintain consistency.

For example, if the population includes first-time managers the organization may choose to provide an assessment that is used across all managers and leaders. Any training materials for managers would be used with all coaches in that population. In Organization-Target coaching, the CPS may use materials from the other coaching programs or tailored materials specific to the engagement.

Step 7. Provide Quality Control and Feedback

Organizations understand there is a "black box" around the coaching relationship, meaning the coach and client have confidentiality for the coaching sessions. As a result, organizations may not have a sense of whether a coach is doing their job or a client is on track with any organizational objectives. That said, it is possible to gain an understanding of the quality of the engagement by surveying the client.

A quality system for coaching provides a means for the client to report the quality of their coach and content back to the manager of the coaching program. The feedback system can be in the form of a survey around key coaching competencies as specified by the ICF or a modification on these conforming with what the coaching program manager is seeking. A mid-point feedback allows the coaching program manager to convey any improvement areas back to the coach so they can readjust their coaching if needed.

In Organization-Target coaching, the coaches can report any themes they might see across their clients to the coaching program manager or CPS. Coaches might relate barriers to client coachability or to achieving the desired organizational goals. The coach should not share any information that would expose the content of a client's conversation or identify anyone.

If the client's supervisor seeks input from the coach regarding the client's progress, the coach would be required to direct the supervisor back to the client. The coach could suggest they have a three-way conversation. The coach might also request an alignment meeting with the coach, client, and sponsor present.

Step 8. Measure Success

The desired outcomes of the coaching program will identify how success can be measured. In Individual-Target coaching programs, success is based upon the satisfaction of the client. In the case of Audience-Target coaching programs that engage populations where there are organizational goals for the coaching, a sense of achievement may include the integration of leadership competencies. These could include emotional intelligence or difficult conversations.

Success on these factors may be garnered from employee engagement surveys that pose questions around these areas of competencies. Success for the transitioning leader may be gauged by a 360 survey around the leader to see if scores pre- and post-coaching have changed. For the Organization-Target programs, metrics for success need to be crafted against the desired organizational outcome.

When contemplating an internal coaching program, organizations must first understand what's involved with internal coaches. This includes both the pros and cons related to using coaches who are also employees and coworkers. Leadership will want to identify goals for the coaching and from there, determine if internal or external coaches would best serve their needs.