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# Talent stretching through coaching

## A guide to using coaching

coaching - technical mentoring - virtual peers



## The power of coaching

Coaching has become much more widespread in organisations over recent years. Outcomes from coaching can be remarkable, leading to significant changes in attitude and improvement in individual performance in a short period of time.

If you are new to coaching, it can be a bewildering experience. Where to start? What can I expect? How do I find a coach? How do I choose between the different types of coaches? When should I use a coach?

We have written this guide to help people understand some of the issues involved in taking on a coach either for themselves, or others in your organisation. By being clearer about what support you need, you will be better placed to make sure you choose the right type of one-to-one support.

## Types of coaching

There is no shortage of coaches: life coaches, business coaches, wellness coaches, cognitive behavioural coaches, performance coaches, career coaches and executive coaches. That's before you get to the large number of "I'm an accredited to (insert name of organisation or methodology)" coach. Then there's mentoring.

There are many definitions about what coaching is but it is generally accepted that coaching is a broad term to cover one-to-one development interventions and it can take many forms within organisations. Executive or leadership coaching (coaching in the unknown) and managerial coaching (coaching in the known), to coaching which embraces elements of both. Many organisations also want to introduce a coaching culture in which managers adopt a less directive approach to those reporting to them to encourage and develop skills and innovation.

At heart all coaching shares core principles.

- **One-to-one:** focused on a individual (although group/team coaching is offered)
- **Confidential:** What is said between the coach and person being coached is confidential, even if someone else is paying the bill
- **Pragmatic and future focused:** It does not dwell on problems or the cause of problems, but how to move forward.
- **Developing self efficacy** in the person being coached: At heart is the belief that people more likely to change and achieve their goals quickly when they tap into their own resources so the primary task of a coach is to help develop the coachee's ability to self coach.
- **Facilitative, not directive:** the coach's expertise is the *process* of coaching – the pace and direction are set by the person being coached.
- **Time limited:** the individual should not become dependant on the coach but learn how to self coach going forward.

Herein lie some of the problems: some clients want a more hands-on and directive approach. Or they want to support a number of people. Others want to know what came out in the sessions that they are paying for. Different approaches may be required.

To help guide clients to choose the right coaching approach, we offer three streams of support: performance coaching, technical mentoring and virtual peer. All three interventions provide one-to-one support for individuals to help them develop the skills, knowledge and behaviours to be highly effective in the workplace.

Sometimes you may require only one style. At other times you may want elements of all three approaches from the one coach: we distinguish between coaching, technical mentoring and virtual peer in the following way:

**Coaching:** Coaching is usually a one to one intervention. A coach works with someone (coachee) to help them develop their performance in a particular area. Coaching is person centred – it is led by the needs of the person being coached. The underlying principle of coaching is that people are capable of generating their own solutions, and that performance improvement comes from self reflection, self awareness and generating solutions ourselves. So, a coach's skills are in listening, asking questions and challenging the thinking of the person being coached with a view to improving performance. The person being coached should become self supporting, not dependent on the coach. That's why coaching assignments should be short term. Typically the performance areas fall into two broad categories: skills (what we do) and attitudes (how we do it).

Think about sportspeople like tennis player Andy Murray. His coach will help him with technical skills of serving, volleys and fitness for those long matches to ensure he minimises injury. Yet much of Murray's tennis coaching has been about attitude - building confidence and self belief. With Murray, too often a couple of missed points were damaging for his game, he gave up on himself and put himself down. To become a world champion he needed to deal with his self doubt.

In the work place skills covers abilities – things we want to be better at. I want to manage a team better; I want to be more assertive; I want to know how to develop big sales accounts. This is often called Performance Coaching or Solution Focused coaching. A coach will help the individual set goals, identify options and steps to achieving those goals and deal with setbacks.

Coaching for attitude is often the realms of cognitive behavioural coaching (CBC) which emphasize that how we react to events is largely determined by our view of them, not by events themselves. Hence CBC approaches can be relevant to executive coaching where an individual's performance is being inhibited by his/her thinking and emotions. This often includes issues such as wanting to be more confident, more assertive, more resilient to set backs; anger management; stress and procrastination. Cognitive behavioural coaching delves into often long held beliefs and emotions that may be affecting performance and requires great empathy and communication skills on behalf of the coach.

A good coach will be aware of and experienced in dealing with both solution focused and cognitive coaching to ensure they have a broad range of techniques and approaches.

The emphasis here is on the coach's ability to draw information from the individual and help that person arrive at an understanding of their situation and to identify options for the future. The coach does not necessarily require any knowledge or experience of the work environment or industry sector, and does not propose options or make suggestions – the onus is on the individual to identify options and make decisions. The approach is distinctly facilitative.

**Technical mentoring:** This is where the focus is more specifically related to the task or job and the role of the technical mentor is to use his or her relevant technical knowledge and experience to help the individual develop their performance in their role. Therefore, broad coaching skills are necessary but not sufficient – more detailed knowledge and experience of the function or job involved, or the level of seniority and associated issues, are necessary.

Sometimes a person being coached can find the experience frustrating if they are being asked to generate options when they lack technical knowledge or experience. They want the input and help of an experienced practitioner. Hence, the technical mentor requires this knowledge to be able to propose

options and make suggestions that the individual can consider and try implementing. The approach can therefore be more directive than a coach but should not become a replacement for a line manager. Note, technical mentoring assumes the mentor has a level of experience and knowledge in the field *and* also has coaching skills to ensure the skills are developed in the person being coached. Without the coaching skills, the technical mentor simply becomes an interim, a substitute for the employee. Technical mentoring should not be confused with individual training. Mentoring requires that the individual being mentored has been trained and understands what they need to do, but struggles to achieve the levels of performance required. If the skills are completely new, then it might be more appropriate to provide suitable training and then using technical mentoring to help embed the learning.

Technical mentoring is suitable for different levels of experience and grade.

It may be appropriate in a situation where, for example, a successful sales person needs to develop a strategy for targeting and acquiring new large accounts. However, his ability to develop and present a compelling business case to the board is weak. A suitable technical mentor could work with him to develop these skills by providing feedback and challenging thinking and approaches. Alternatively, technical mentoring could be provided to sales teams who have been trained in cold calling phone skills but whose members would benefit from a technical mentor sitting in on calls and giving feedback and suggestions.

Consultants are often hired as technical mentors – to assist a team to achieve an outcome so that when the consultants leave, the skills, knowledge and behaviours are embedded in the organisation. This is very different to consultants doing the job in isolation.

**Virtual peer:** The Economist magazine’s advertising strapline many years ago was “it’s lonely at the top”. The virtual peer role is to give senior managers wide ranging support, both strategic and operational, especially where there is an absence of other peers within the organisation who can provide this level of support. Senior managers are often required to provide support and development opportunities for others below them, but often lack that support themselves.

This is our equivalent of a non-executive director, but where the support is aimed at the director or senior manager, rather than the board or organisation. It allows senior managers to speak openly with the virtual peer and rehearse arguments in a safe environment, explore ideas and crucially, take advantage of aspects of technical mentoring that may be appropriate to particular initiatives or projects they are leading. As the range of issues may be more wide ranging, the virtual peer should have a wide range of suitable contacts that can be called upon. Crucially they are bringing extensive business knowledge and experience to the role. The approach combines coaching and technical mentoring with a sparring partner – and considerable management experience.

The virtual peer approach is common in the US where many senior executives retain a personal coach. While performance coaching and technical mentoring are suitable for all levels of experience virtual peer is most suitable for heads of function, management team or executive team members.

## Which one to use?

We use the three different titles to highlight the differences between the approaches and help clients decide on which route is most appropriate. Quite often, the boundaries become blurred as the interventions are flexible and it may be appropriate to use a mix of coaching styles to achieve the desired outcomes.

**Performance coaching** is the preferred route when:

- The individual and/or others are looking for improved performance – often for high performing individuals or for succession planning – and are looking for an independent person to help with this talent stretching.
- A well regarded individual in the business has behaviours that are limiting or affecting their performance in the workplace – identified either by the individual or that person’s manager or peers. These could be related to motivation; stress and anxiety; relationship conflicts; setting direction; perfectionist traits; cultural fit etc. Often used as part of leadership development programmes;
- Some one is not performing well and the organisation wants to give the individual the opportunity to address their performance although the cause of the issue is not clear.
- Personal differences between employees are putting a strain on the wider team. There is a desire to handle it sensitively without escalating the issue.

**Technical mentoring** is the preferred route when:

- A new way of working is being introduced and there are insufficient role models or managers to provide the hands on supervision required to achieve the change required;
- An individual has undergone rapid promotion and is lacking experience and knowledge of key skills and behaviours and rapid change is required;
- Training is regarded as an inappropriate development route, often because there are insufficient people for a course; because the issue is highly specific; rapid development is required; and/or the seniority of the individual or the development involves information that needs to be dealt with confidentially/ with great sensitivity.
- Line management does not seem up to the task and technical mentoring is seen as a rapid response to the problem.

**Virtual peer** is the preferred route when:

- The individual is senior in the business and would welcome constructive input and/or feedback but lacks access to peers with sufficient knowledge and experience of their area to provide it;
- Politics are such that the senior manager would benefit from the opportunity to rehearse difficult issues in a safe environment and receive constructive and impartial feedback;
- There is a need for specific areas of development for individuals identified as part of succession planning;
- An individual would welcome alternative views on an ad-hoc basis but there is a lack of such talent in their organisation;
- A senior individual feels that they would benefit from their own talent being stretched and challenged;
- An individual wants on-demand access to senior level experience and acumen as and when required, either formally or informally.

## How does it work?

All three – performance coaching, technical mentoring and virtual peer relationships - require flexibility as they are designed to support the individual in the workplace. The aim is not to develop a dependent relationship. Nor should the interventions disrupt business operations, but support them. Hence, arrangements will vary depending on the individuals, the issues, and time constraints.

For each type of intervention to be successful they require the following:

- Agreement of the individual to the intervention, especially where the individual has not requested the support directly but has been advised to accept it by a line manager or HR;
- Relationship fit is important: The individual to be coached should feel comfortable with the coach, mentor or peer and agree to the individual – this is usually achieved by both parties meeting ahead of an agreement to proceed;
- A technical mentor and/or virtual peer should be able to demonstrate specific knowledge and or experience of the skills and or behaviours that require support;
- A coach should be able to explain the general principles underlying their approach and what will happen in a session;
- A clear understanding and agreement to how the arrangements will be undertaken by the parties to the agreement (the contract) i.e. the individual to be coached; the coach and the coached person's line manager/budget holder for the coaching.
- A clear contract that sets out rules of engagement for confidentiality, ethics, duration, governance, billing, and rights and responsibilities of all parties.

## How much time is required?

- This will vary depending on the requirement. For example, technical mentoring may be used to support the development of new skills as part of a new way of working such as the introduction of category management in a procurement function or a new sales process. This may require a period of intensive on the job support. A small number of individuals in targeted areas may get considerable support over a period of several weeks.
- Others prefer a more planned approach. For example six sessions of 90 minutes, once per week, with a focus on a particular issue. This approach works better with coaching: technical mentoring benefits more from a more practical and flexible approach.
- A virtual peer is different again. This role is more likely to require additional time outside of the face to face interventions for example in reading reports, strategy development, research etc. The peer needs to keep him or herself sufficiently up to date with what is happening in the organisation to be able to fulfil their role.
- Before the commencement of an assignment, it is important that both parties understand how much time has been agreed, and how that time should be used.

## Where does it take place?

- For technical mentoring, it is often preferable to visit the individual at their workplace. This allows the mentor to get a clearer understanding of the environment the individual is working in. However, it is important that there is a suitable meeting space: the individual should feel that they can speak openly

and confidentially. Open plan offices can make this difficult. Hence, the choice of venue is often a factor of the availability of appropriate meeting rooms.

- Certainly for the virtual peer, it can be beneficial for the individual to step outside of the workplace where they are not distracted by phone calls and emails. A different environment can lead to fresher thinking. We have a suite of offices and meeting rooms in Moreton-in-Marsh Gloucestershire that can be used for these interventions.
- Although technology is no substitute for face to face interventions, it is a great enabler. We find Skype can provide a great hybrid technology for providing face to face sessions when the parties are in different locations and provides great flexibility for scheduling sessions.

## Payment mechanism

Despite the flexible nature of all coaching interventions, it is important that a client can have budget certainty. There are different options:

- **Fixed price:** Where a price is agreed for a set number of meetings of a fixed duration. This can work for performance coaching where, for example, there is an agreement to six 90 minute sessions in an agreed time period.
- **Call-off agreement:** Where a budget is agreed between the parties (provider and budget holder) for an agreed amount of hours over a specific period of time and, like a debit card, the amount decreases as the hours are called off. Some flexibility about short calls should be encouraged so that people don't feel they are on a meter. The value of this approach is that support is there when they need it, rather than being locked into scheduled meetings. This can work for coaching, technical mentoring and virtual peer.
- **Retainer:** This may be a preferred route for a virtual peer if the relationship is envisaged to be of a longer duration, perhaps for a year. A monthly retainer is agreed to accompany the agreed role. This may for example assume that the peer will be undertaking significant amount of work outside of the one to one sessions such as reviewing reports and presentations, developing options and opinions, seeking the input of others etc.
- **Payment by results:** Some coaches offer this approach suggesting businesses pay them what they think the results are worth. Typically it is used for achieving a step change in performance of very senior managers. Contracting for this approach can be complex and is perhaps best kept for when the coach is well known to you for their results.

With all three payment mechanisms it is essential that both parties have a clear understanding of the nature, scope and objectives of the relationship envisaged so that an appropriate payment mechanism and budget can be agreed.

The rates will be influenced by the experience and knowledge of the coach, mentor or peer as well as the amount of contact required.

## Setting up a coaching arrangement

When deciding how to proceed, a useful approach is:

- Use the descriptions above – coaching, technical mentor, virtual peer - to initiate a conversation with the relevant employee to get a better understanding of their objectives and your objectives: what they wish to achieve; what style would work best for them; the level and type of support required; duration and scope. Is it to support a particular initiative, for ongoing peer support, talent stretching, succession planning or rising to new challenges in the job?
- Based on the conversation, summarise your joint understanding of the situation and the type of coaching intervention you both think might be useful and what outcomes you would hope to achieve.
- Now that you know what type of support you are looking for and what outcomes you want, you now need to identify suitable coaches. Are there any internal coaches? Would they be appropriate? Are there any in your network? Speak to business contacts and see if there are any recommendations. Talk to us!
- Arrange an initial informal meeting to clarify scope and check personal fit with a few potential coaches. This should be attended by the individual to be coached, the potential coach and the sponsor – the party paying the bill. Are they interested in you and what you want to achieve or are they more interested in telling you about themselves? What coaching experience have they had? How do they approach assignments? Will they tell you what you want to hear or challenge your thinking?
- If appropriate, let the coach and the person to be coached have a separate conversation to get a better feel for objectives and style. Be open and honest about doubts, questions and concerns – a good coach will expect these.
- Based on the meeting, get feedback from all parties especially the person to be coached. Which coach can they see themselves working with? What approach will the coach take? The proposed coaches should submit a proposal outlining their understanding of your requirements, the proposed approach and fees. Be prepared to meet a few coaches if the early ones don't feel right.
- Contracting is important – make sure all parties understand the rules of engagement, ethics, objectives and payment terms. Your organisation may have a coaching contract available, if not we can provide advice. This should also include a non-disclosure agreement.

## Traps for the unwary

Experienced and professional coaches will be experienced in contracting arrangement. But if you are new to contracting for coaching services, here are some common issues to look out for:

- **Purpose:** Beware coaching for coaching sake. Be clear about your objective.
- **Confidentiality:** The confidential nature of the relationship between coach and client forms the basis for trust within the relationship. There are several ways in which confidentiality can be breached within an organisational context. First is the triangle of coach, sponsor (the person paying for the coaching) and client (the person being coached). This can be threatened by the sponsor wanting reports or progress updates. The coach needs to ensure that agreement is reached with the sponsor and the client about boundaries before a coaching assignment starts. It is more appropriate for the coachee to agree to provide feed back to the sponsor about progress than for the coach to do this. There is potential for confidentiality to be compromised when a coach is coaching several people within the one organisation, often across teams, and is privy to sensitive information about the individuals and the organisation.
- **Boundary management:** The coach needs to be mindful that any information they are given about individuals by the sponsor does not result in them prejudging the coachee or others. While friendships

may develop over time between coach and coachee or sponsor, the coach needs to ensure that personal bias does not influence professional actions.

- **Competence:** Coaches should be conscious of the limits to their coaching competence and not try to be all things to a client. The coach needs to be able to differentiate coaching from consulting or possibly even therapy, and be prepared to decline work or refer a client on. If the coach starts behaving as a consultant they are undermining the principle of encouraging self efficacy i.e. facilitating the client's learning to find her/her own answers.

**We hope that you have found this useful. Please don't hesitate to contact us if you would like to talk about how we could provide coaching, technical mentoring and virtual peer support to your business.**

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