

GUIDE

# HOW TO IMPLEMENT EFFECTIVE COACHING PROCESSES WITHIN YOUR ORGANISATION

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# 1. Introduction

How will you ensure your relevance and sustainability as you navigate the Fourth and Fifth Industrial Revolutions? How will you redefine your business post pandemic? What will it look like to pivot traditional management styles to human-centric leadership? As an organisation navigating this 'new normal', you are confronted with rethinking the way your employees work, relate and lead.

As one of the fastest growing industries in the world, coaching is a proven means for leveraging human potential and elevating critical and creative thinking, action and accountability, clarity, decision-making and team alignment. Leading organisations across the globe use coaching as a key differentiator. It is about business.

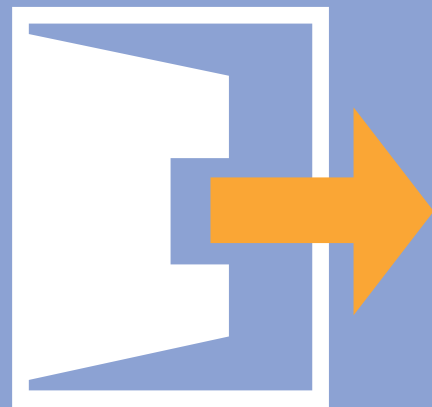
As GIBS puts it – *it is the business of being human.*

In 2020, as leaders in coaching, GIBS launched South Africa's first Coaching Landscape Report – a consolidated view of coaching in South Africa from three critical perspectives:

- Coaches
- Coachees
- The Buyers of Coaching

Understanding that business coaching is the about the nexus of organisational and personal objectives, GIBS used these insights to create this How To Guide. It is a comprehensive guide for any organisation – large or small – seeking to use coaching as a leadership development tool.

With a centre dedicated to personal and applied adult learning, Coaching@GIBS has over 100 internationally acclaimed Coaches and Facilitators to support you in customising your leadership development intervention.



As South Africa's leading business school, GIBS' priority is to support business in developing African leaders. Coaching is a critical tool to do this. As former GIBS Dean, Professor Nicola Kleyn, says, *“As we travel a journey of global change, acquiring knowledge and skills is no longer enough for learners of today. Coaching creates the ultimate opportunity to work on building a bridge between who we are and what we want for ourselves in future.”*

Continue the conversation at [Coaching@GIBS.co.za](mailto:Coaching@GIBS.co.za)

Find the individual survey results as well as the integrated Coaching Landscape report, at <https://www.gibs.co.za/coaching/pages/coaching-resources.aspx>

## 2. The use of coaching and mentoring within an organisation

### Coaching Mentoring?

Understand defined purposes and then choose

### 2.1.1 What is coaching?

Prior to implementing any coaching intervention, it is useful to ensure that there is a shared understanding of coaching.

GIBS Coaching Landscape Report (2020) consolidated the following definition of coaching, based on feedback from coaches, coachees and buyers:

Coaching is a collaborative, client-centred process, through a trusting relationship. It is based on listening, questioning, supporting and challenging, in the holistic context of an individual's personal and work life. This process facilitates thinking and reflecting for decisions, actions and learning. As a result, individual and organisational goals are achieved. Coaching also enhances personal and professional meaning and purpose.

Definitions do not just exist for academic purposes. Ultimately organisations should look at what they are trying to achieve and based on that, compare these objectives to different interventions. The interventions ideally should not be compared to each other but rather in how they relate to the objective.



DO NOT COMPARE TO EACH OTHER

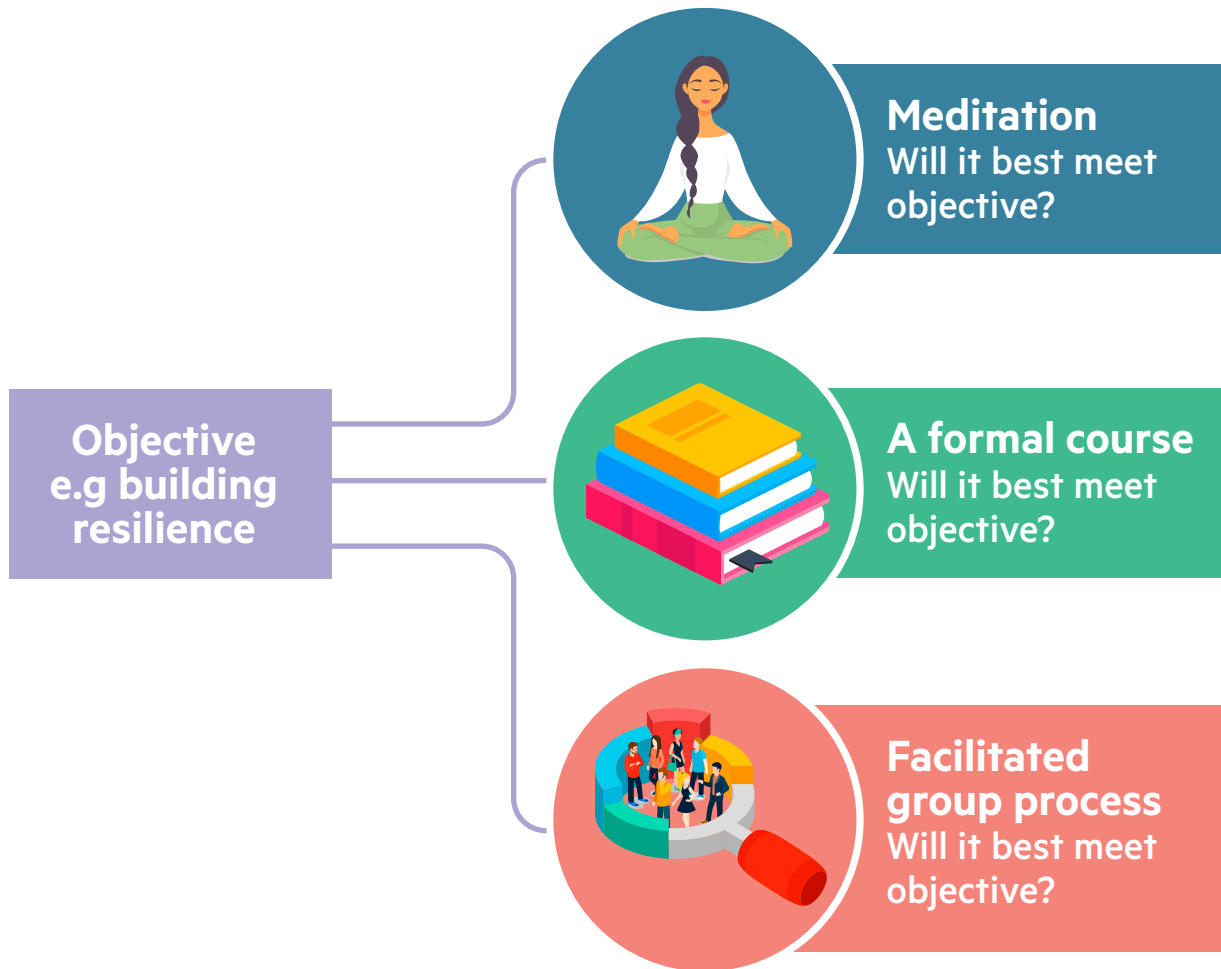
Should we do training ? Pros and Cons

Should we do coaching? Pros and Cons

Should we do mentoring? Pros and Cons



## ...RATHER COMPARE EACH OPTION TO OBJECTIVE



### 2.1.2 What is mentoring?

Often the terms coaching and mentoring are used interchangeably. While they are both developmental tools, they do vary in emphasis and nature of process.

The Coaching Landscape Report (2020) consolidated the following definition of mentoring:



**Mentoring is a process in which a more experienced person with subject matter or industry specific knowledge, uses their knowledge and expertise to guide and advise the less experienced mentee/ protégé. The purpose is to develop and upskill the mentee/ protégé in their work role and professional capacity.**



## 2.1.3 How to choose between coaching and mentoring?

Both leverage a learning exchange and rely on human-centric skills, such as deep questioning and active listening. One way to choose which is more suitable is to look at the different actions involved. This difference highlights the nature of the relationship. Mentoring uses words such as *show, tell, teach, provide, advise*. These words imply a level of expertise within a specific industry or subject matter. This assumes then that mentors are more experienced and knowledgeable in the subject matter than the mentee is, as the mentee would *watch, listen and learn*.

A coach would be more suitable if the primary purpose is *facilitating thinking, enabling and reflecting*.

These guidelines are not always as clear cut and one might find a mentor using a coaching style or a coach who may at times give advice; but they do draw emphasis to the prime purpose and dominant nature of the process.

GERUNDS USED WHEN DESCRIBING COACHING – The actions that happen in coaching	GERUNDS USED WHEN DESCRIBING MENTORING – The actions that happen in mentoring
Facilitating	Advising
Sharing	Guiding
Unblocking/ Unlocking/ Uncovering	Transferring
Affirming	Cementing (skills)
Unlocking	Showing
Collaborating	Giving (advice)
Enabling/ Enhancing/ Encouraging	Teaching
Challenging (assumptions)	Connecting (mentee to experts)
Empowering	Providing
Respecting	Telling
Deepening/ Heightening (self-awareness)	Informing
Creating (a safe space)	Advising
Partnering	Directing
Reflecting	

Table 1 Gerunds (action words) used when describing coaching and mentoring (derived from respondents of the GIBS Coach Landscape Report)

There are gerunds/ actions that overlap and are in both groups. These include *listening, supporting, helping and inspiring*.

## 2.1.4. The business case for coaching

The three most important reasons for coaching are **personal development, career development and leadership development**.

Buyers prioritise leadership development, given its influence on business success. However, there is recognition of personal impact too. The reverse is true from a coachee perspective.

It is particularly important to note that coaching is not necessarily used for coaching in and of itself, but that coaching is almost always used to serve a broader organisational strategy. This could be leadership development, talent development, transformation, change, or other strategic initiatives.

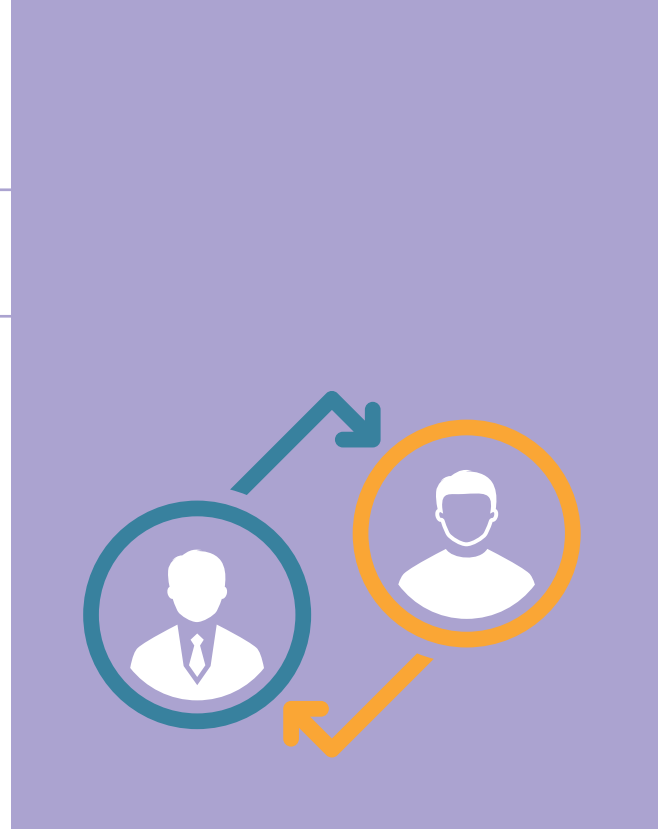
How you demonstrate ROI (return on investment) depends on this organisational strategy. Coaching can add value to that strategy, with its underpinning of commercial and non-commercial objectives. Identify areas for change and customise measures of success (both quantitative and qualitative). Measures should be equally assessed pre- and post-coaching.

A potential measure for leadership development may be 360-feedback. Coaches are usually skilled in working with self-discovery assessments, like the 360, to expand self-awareness and assist in the application of relevant leadership tools and techniques in the workplace. Developing more self-confident and aware leaders will not only have a positive impact on their personal growth. Stronger leadership will certainly positively impact your business too.

As a buyer, you may be motivated by organisational objectives. However, do not disregard personal levers as a powerful way to gain coachee buy-in. This is increasingly important as we move through the Fourth and Fifth Industrial Revolutions, where human-centric skills – like creativity, critical thinking and emotional intelligence – become key leadership differentiators. In this environment, tapping into employee's discretionary motivation can only have a multiplying effect on performance outcomes.

It is worth emphasising the personal (wellbeing, resilience, balance), professional (advancement, learning) *and* organisational benefits of coaching.

More about measuring the success of coaching is discussed in Part 3.



It is also important to consider the barriers to coaching, especially in the position of a buyer. These may include, but are not limited to:

- **Budget constraints**
- **Time constraints: Executives may find it difficult to safeguard time for consistent coach sessions, with potential negative impact on the coaching experience. The critical question to both money and time constraints is, “What is the cost of not using coaching?”**
- **Lack of rapport between coach and coachee**
- **No or unclear measures of success at the start of the coaching engagement, making ROI difficult to prove at the end.**

Identifying and understanding barriers to coaching may support your approach to requesting or selling coaching to an organisation.

Finally, as previously mentioned, coaching can be used as part of a broader development strategy. For example, you may opt to send leaders on a training course. How do you ensure that skills acquired during training are then applied on the job? This is where coaching plays a critical role, holding leaders accountable in context. Another example is the use of coaching within a programme. Coaching is a powerful tool for enhancing learning and has been used effectively in group settings to leverage peer wisdom and application. More about the power of group coaching is discussed in the next section. GIBS is highly experienced in using coaching as part of a post-programme ‘embed’ process, as well as part of programme design and delivery. Contact [Coaching@GIBS](mailto:Coaching@GIBS) to find out how you can further amplify the impact of any learning interventions within your organisation.



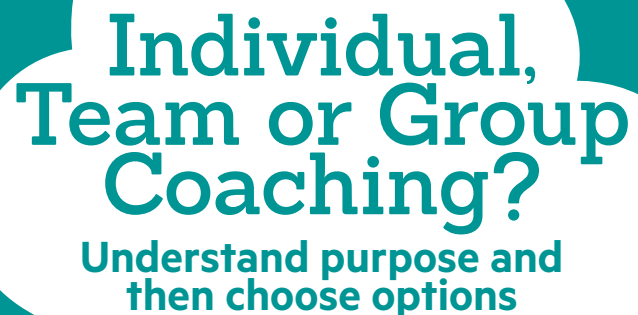
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## 2.2 Types of coaching

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Coaching can be done with 1) individual and the coach; 2) with a team (e.g. finance team); 3) a group (e.g. people from different divisions such as one person from finance, one from HR, one from sales etc).

A combined approach could be used e.g. the finance manager might be having individual coaching but then decide to work with his finance team and have team coaching. Another example might be that the organisation implements group coaching with cross functional groups and an individual decides to embark on individual coaching. A brief description of when to use which coaching type follows below.



**Individual,  
Team or Group  
Coaching?**  
Understand purpose and  
then choose options

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### 2.2.1 Individual coaching

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Individual coaching is used when a specific developmental objective is desired for an individual. Common objectives include:

- **Leadership development** – coaching the individual to be a more effective leader
- **Transition management** – coaching prior to a promotion or during a newly acquired role
- **Personal development** – coaching on specific competencies e.g. developing assertiveness, emotional intelligence, conflict resolution skills

The individual coaching could be very specific e.g. James needs to enhance his communication and John needs to work on developing his resilience in stressful situations. Alternatively, it could be generalised to a level e.g. all our executives need to become comfortable dealing with ambiguity.

It must be remembered that coaching is not training and while some skill- or technique- sharing might be discussed with an individual, this would not be generalised to all individuals who are being coached. If a model/ technique/ framework needs to be shared with all, a presentation or training session is a better method.

#### **A NOTE ON PERFORMANCE MANAGEMENT**

It is important to stress that individual coaching should NEVER be used as a substitute for management, including performance management. Managers need to manage performance – both good and poor performance. ‘Remedial coaching’ is a relatively new term that refers to the idea of using ‘coaching’ to deal with poor performance. However, it is not coaching as it contradicts the definition (or intention) of coaching in the following ways:

- **It is not an egalitarian, helping and trusting relationship**
- **It is not self-directed in setting of goals, actions and measurement of achievements (where the coachee is in the driver’s seat)**
- **It is not a safe space**
- **It does not prioritise open exploration of creative possibilities and insights**
- **It is not non- judgmental**



## 2.2.2 Team coaching

Team coaching is aimed at a specific team. Katzenbach and Smith (2015) list the characteristics of what makes up a team. These are listed below.

- |                               |   |
|-------------------------------|---|
| • <b>Small number</b>         | <b>2-10</b>   |
| • <b>Complementary skills</b> | <b>Task related (interdependencies of work)</b>         |
| • <b>Common purpose</b>       | <b>Team purpose</b>                                     |
| • <b>Performance goals</b>    | <b>Team objectives</b>                                  |
| • <b>Common approach</b>      | <b>Agreed team process/ approach to decision making</b> |
| • <b>Mutually accountable</b> | <b>Team agreement</b>                                   |

Team coaching is used when you want the team to jointly and collaboratively work through a thinking and reflecting process aimed at reaching a resolution or decision. The purpose of team coaching is team growth, which encompasses personal growth and learning. It is also about helping a team manage change, transitions, collaboration and performance.

Again, team coaching is not team training and if you want to develop a specific set of competencies and knowledge, training would be a better option than coaching.

Team coaching sessions tend to be longer than individual coaching sessions. Depending on the objectives, they may vary in duration from three to six hours. The frequency will also vary depending on objectives. Normally a minimum of three sessions is recommended.

### A TEAM COACHING PROCESS MIGHT LOOK LIKE:

- **Session 1:**  
Confirm rules of engagement. Identify the (underlying) issues. Co-design team coaching purpose and outcome.
- **Session 2:**  
Craft action plans in relation to the agreed outcome.
- **Session 3:**  
Review the actions and modify based on input/ feedback.
- **Session 4:**  
Reflect on the lessons learned and the actions for future sustainability.

All coaching focuses on both content and process.

The identified issues offer **content**. For example, ‘how does this team choose to communicate’ (communication might then be the content).

The team coach would then use coaching and facilitation skills to harvest collective wisdom from all members of the team, in support of generating great communication. This is the **process**.

Both the content and process are essential in ensuring actionable outcomes to which the team can be held accountable.



## 2.2.3 Group coaching

Group coaching differs from team coaching in that the group is not an intact team. In fact, they may not even be from the same organisation. Group coaching is a powerful process as it amplifies the opportunity for learning. With a highly skilled group coach, fresh and varied perspectives are considered. Through a facilitated coaching process, these perspectives are translated into action, and made applicable to the workplace.

Group coaching is used primarily in two major areas – 1) in support of training or a leadership programme and 2) in support of organisational change.

Learning in group coaching takes place at various levels:

- **Individual insights and personal learning**
- **Exchanges between people (e.g. feedback between peers or shared learning between group members)**
- **Group learning (e.g. cross functional teams learn together to build trust as part of an organisational change initiative)**

Group coaching has important but under-used potential as a means of creating goal-focused change in organisational contexts. The benefits of individual and team coaching seem to be more commonly accepted. These benefits apply to group coaching as well e.g. enhanced trust, better communication, personal growth. Over and above these are some very specific group coaching benefits within organisations. These are listed below:

- **Peer learning among people who work in same organisation but are not in same team**
- **Personal learning through feedback, interaction and exchange with others**
- **Developing a common language across people from diverse backgrounds**
- **Breaking down barriers across an organisation**
- **Cost effective – time and money**
- **Scalable**
- **Developing relationships and networks across organisations**
- **Improved systemic awareness of the organisation**
- **Prevention of organisational silo formation**
- **Knowledge transfer**
- **Improved group energy levels**
- **Better organisational results**
- **Improved likelihood of durable changes in behaviour**

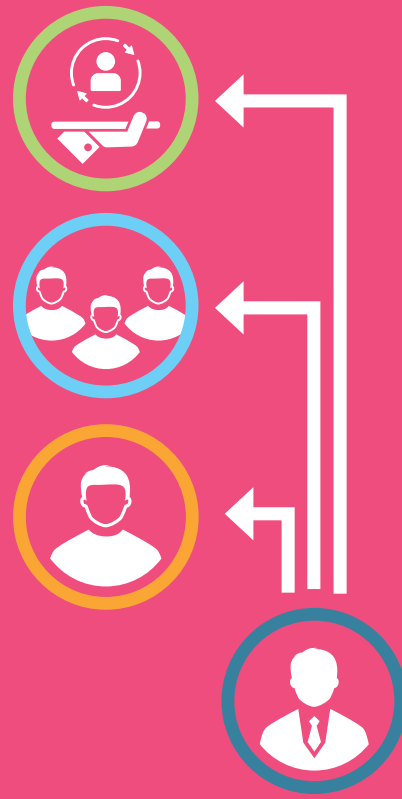
(Brown & Grant, 2010; Hawkins & Schwenk, 2011; Kets de Vries, 2014; Thornton, 2010)

Group coaching is not facilitation, it is not training or team development nor is it consulting. It is a personalised reflective space with individuals who are not in a team. It leads to action, but actions may vary across groups. Just as individual coaching is different for each individual, group coaching is different for each group.

For more information and guidance on group coaching, see GIBS White Paper on Group Coaching <https://www.gibs.co.za/coaching/pages/coaching-resources.aspx>

# Virtual or in the same room?

Understand the benefits and practicalities of each



## 2.3 Modes of coaching: Virtual or face-to-face

Historically, face-to-face coaching in the same room was the most commonly used mode in South Africa. However, with COVID-19, the emerging trend of virtual coaching has mushroomed. This aligns to global trends in coaching, where technologies – like Zoom, Skype for Business and Microsoft Teams – have offered opportunity to scale coaching across time and geographies. Coaches and coachees who use virtual coaching seem to gain the same benefits as coaching face-to-face in the same room. It may also have cost-saving benefits. Many state that virtual coaching removes some distractions and aids reflection and focus. In some parts of the world, like the USA, telephone coaching is also common. With the use of technology, coachees can match with a coach anywhere in the world!

Consider further customisation of coaching with:

- Sessions, frequency and duration of coaching
- Rates
- Selection of coaches (including a discussion on both rapport and professional bodies)

How to customise based on these criteria is detailed in the next section.

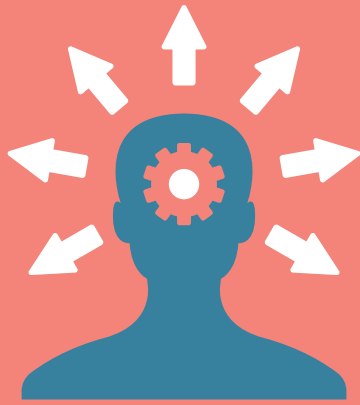
## 3. Create a coaching framework for your organisation

Traditionally, coaching interventions have been reserved for executives or young talent within organisations. This is changing.

Leaders are seeing the value of coaching as a critical managerial tool. Many of the coach competencies support team effectiveness, output, performance, accountability and innovation. No doubt you recognise these terms – key objectives sought after by leaders in business today.

Leader as coach is a dominant trend infiltrating the workplace. And those who are unwilling to adopt this new way of managing may just be left behind.

Coaching@GIBS – the centre within GIBS dedicated to coaching and facilitation services – offers coach and consulting interventions to take your learning organisation to the next level by supporting the crafting of a relevant coaching framework.



Creating a coach culture within an organisation means that every employee has the opportunity to benefit from a coaching engagement – whether it be formal one-on-one coaching, group/ team coaching, manager as coach or coaching as part of a leadership development programme.

Upskilling managers with coach competencies is a vital way to prepare your leaders for the Fourth and Fifth Industrial Revolutions. By now, we are clear that our VUCA environment demands a different kind of leadership. We now know that the old paradigm of ‘command and control’ does not get the best out of teams. Rather, our ability as humans to be adaptive, creative, decisive, to facilitate, think critically and have empathy are essential to compete in the 21<sup>st</sup> Century. Coach training is a powerful way to harness these skills amongst all employees. Leadership development is no longer reserved for those at the top. It would be wise to consider cascading a coaching style of management across all levels. This means training leaders in the arts of active listening and deep questioning; allowing leaders to create space to think both critically and creatively; upskilling leaders to consider multiple perspectives and options. Coaching@GIBS offers training for both leaders as coach as well as professional coach training (ICF-accredited).

Another way to foster a holistic coach culture within your organisation is to offer internal/ external coaching to individuals and/ or teams.

The seven steps below provide a framework on how to do this:

- 1. Establish a coaching sponsorship and governance process**
- 2. Develop a purpose-driven use of coaching (includes type and mode of coaching)**
- 3. Have a process for identifying the coachees to be coached**
- 4. Agree on coaching logistics**
- 5. Have a guideline for selecting and appointing coaches**
- 6. Have a process for managing the coaching process amongst several coach-coachee dyads with supervision and feedback processes built in**
- 7. Design evaluation and reporting processes for coaching. Include recommendations from the coaching process into ongoing and continuous workplace learning and performance.**

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## 3.1 Establish coaching sponsorship and governance process

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Having senior leadership sponsorship of any new intervention is imperative for success. Coaching is no exception. Employees are more likely to buy into a new idea when support is actively communicated from the top.

Clarity is key. People need to understand what their commitment will look like. Coaching@GIBS suggests that those sponsoring coaching set up a coaching governance policy. Coaching@GIBS has broad experience in facilitating this process.

The coaching policy should ideally be co-created from a representative group e.g. someone from the executive team, a person from HR or L&D, and representatives from the group for whom coaching is intended e.g. women, high potential candidates, senior executives. This group is not necessarily responsible for the implementation of the coaching process but is responsible for making explicit the principles that underpin the process.

You may want to use the following example to kickstart your thinking (adapted from a GIBS Coaching Governance Policy, 2016):

“*Organisation x* is working towards establishing a coaching culture within the organisation as part of its broader Learning & Development strategy. *Organisation x* subscribes to the 70:20:10 principal of Learning and Development, where 20% of learning and development effort is dedicated to “Learning through others/ developmental relationships” (such as mentoring and coaching).

Coaching is (*insert organisation-specific definition/ understanding here*).

The agreed outcomes of this coaching intervention are (*insert agreed measures of success here*).

## 3.2 Develop a purpose-driven use of coaching

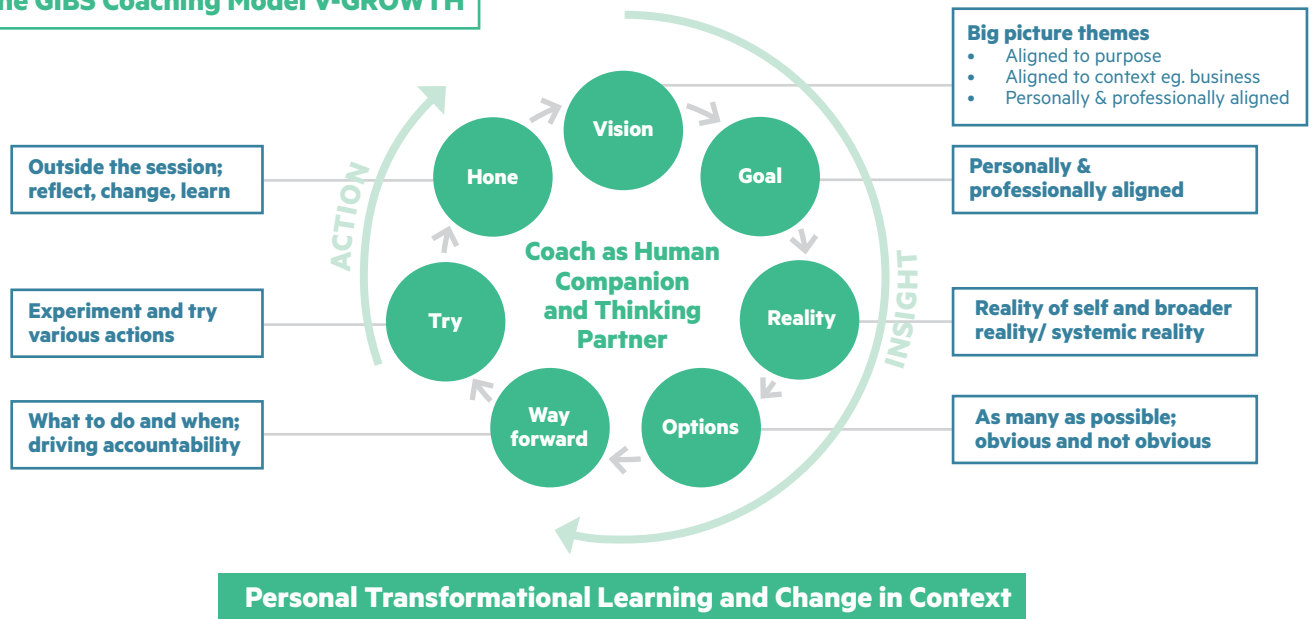
Following the previous point, the sponsorship team should clearly identify reasons why coaching is being used in the organisation. Statements could include principles underpinning the use. Two examples of a purpose and principle statement are stated below:

1. **“We use coaching as a learning and development tool across all levels within the organisation. We are committed to enhancing the thinking skills of our employees through the reflective process of coaching.”**
2. **“Coaching is seen as one of many leadership development tools and processes in our company. Coaching is offered to managers and executives in a leadership position. We aim through coaching to provide our leaders a time to think more strategically. “**

The purpose statement can be used as a compass to ensure that the coaching is meeting expectations. In example 1 – learning and development across all levels; in example 2 – strategic thinking time for leaders. Use evocative language that is familiar to employees within the organisation. This purpose statement should foster buy-in, be easy to understand and inspire participation.

To ensure consistency in coaching, Coaching@GIBS suggests choosing a coaching model that resonates with your coach purpose and organisational culture. Coaching@GIBS uses the V-GROWTH model: Having adapted the familiar GROW model (Goals, Reality, Options, Way forward), GIBS way of coaching also focuses on a VISION aligned to an overarching purpose as well as on experimenting with and honing developing skills. In this way, Coaching@GIBS prioritises continuous and sustained learning and change in alignment to a broader (including organisational) vision. We are more likely to adopt a new way of being or doing if we buy into the WHY (the purpose, meaning or VISION) and if we practice (HONE) this new skill regularly to build capacity, capability and habit.

### The GIBS Coaching Model V-GROWTH



## 3.3 Guidelines for identifying users of coaching (coachees)



It is important that individuals finding MEANING or PURPOSE in the coaching engagement. In other words, the purpose statement (as previously discussed) should resonate with your intended coachees. If it does not, you may want to reconsider WHO you are targeting or HOW you are targeting them.

If there is resonance between purpose and potential coachees, you may just find a group hungry to participate. Then there are other constraints to consider:

A common constraint is budget. For example, budget exists for 10 senior managers to be coached. There are 50 senior managers – how does one select which of the 10 will begin coaching?

A key success factor of coaching is the willingness and readiness of the manager to be coached. Willingness is an openness to coaching and a keenness to engage in the process. Readiness has more components. Three of these components refer to timing:

- 1. Is this the right time?** Not too much pressure. For example, financial year end for accountants might not be the best time for coaching, unless they are wanting coaching on managing time and stress.
- 2. Is there time for the coaching sessions?** For example, if someone is expected to do 96% billable hours, where will there be time for coaching?
- 3. Can the time be flexible?** Research has shown that generally a rigid approach to coaching does not always get maximum benefit. A stubborn, “We will meet at 2.00pm on the third Thursday of the month” can in itself cause stress. A more customised, personalised approach facilitates a deeper readiness.

The final component of the client readiness model is the balance between discomfort and hope. There must be an area that is currently causing discomfort e.g. “I am tired and overloaded at work”. Equally there must be a sense of hope. “I could change this by learning to delegate”. In assessing readiness, the organisation could ask a question like, “Should you commence coaching, what problem/ challenge would you like to address?”

If very little choice exists in selecting coachees – e.g. all of the EXCO team will have a coach – it becomes very important to brief people about the purpose and expectation of coaching. Share the concepts of client readiness with them, so they can begin to prepare themselves for the experience.

## 3.4 Guidelines for setting up coaching logistics



Coaching sessions must be fit to purpose. There are no absolutes in terms of number, duration and frequency of sessions. Ultimately, **the objectives of the individual and the organisation must drive these factors.**

Instead of viewing coaching as an hourly service, you may want to consider an outcome-based approach, where the coach is paid to achieve an objective. World-renowned coach, Marshall Goldsmith, does this. However, it is possible that coaching for (only) tangible concrete results (like an increase in sales) could inadvertently diminish the value of non-tangible results (like accumulating insights or developing capability to 'learn how to learn'). Again, this highlights the need to adjust coaching to purpose and remain flexible.

Successfully operating in a VUCA environment is critical for all industries. Coaching is no exception. If coaching is truly a personalised solution, then personalised timing options should be applied. **This means less rigidity from corporates and more flexibility from coaches.** Consider then, offering coach hours as opposed to sessions. For example, fifteen **hours** of coaching to be used over 6 – 12 months. In this way, during a particularly challenging time, sessions may be longer and more frequent. Alternatively, if an individual is under intense pressure at work, it may be appropriate to postpone a project-based coaching session.

**On-demand coaching and specialist coaching** are also flexible options to consider. Coachees (especially executives) may well find it more valuable to pull on coaching in real-time. For example, a leader may want a quick 15-minute 'sensemaking' conversation prior to having to make a complex decision. Coaches may also have areas of subject matter expertise or experience that a coachee or buyer would like to utilise. There is no reason why hybrid models of 'guiding/ input' with 'facilitating/ coaching' cannot be used effectively (if the interchange is made explicit).

In deciding frequency and duration also consider the context e.g. financial year end, peak selling periods, organisational changes etc. Plan for flexibility around these demands. In general, Coaching@GIBS recommends no less than six coaching sessions. Optimal is 10 – 12 sessions of 60 – 90 minutes over a 12 month period.

Creating a coaching governance policy will support coachees in better understanding the coaching process and ensure that all stakeholders get maximum value from the coaching engagement.

**Consider the below important points to support coachee understanding, buy-in and commitment:**

**3.4.1 Application for coaching:** How does the coachee apply for coaching within the organisation? What questions can be asked upfront to support a successful matching process between coach and coachee? Who needs to approve this request for coaching (e.g. line manager)? Who receives the application (e.g. L&D/ HR)?

**3.4.2 Matching process & 'chemistry' sessions:** We all like choice. Where possible, involve the coachee in the coach selection by offering a short-list of two or three coaches. Doing so helps facilitate upfront coachee engagement. Once a match is made, how is the introductory meeting facilitated? What happens if there is no rapport/ 'chemistry' between the match?



### **A NOTE ON COACH APPLICATIONS AND MATCHING:**

It is often helpful for coachees to complete a **pre-coaching matching form**. Questions may include demographic preferences, as well as more reflective questions like:

- **“What is your greatest achievement to date?”**
- **“What have been some of your most significant obstacles in achieving your career goals?”**
- **“Who is your key support at work and at home?”**
- **“What do you expect from your coach?”**

By completing these questions, the coachee begins clarifying objectives. The person responsible for the final matching of coach to coachee can use these answers to ensure the personalisation of the selection. For example, “I am so overwhelmed – I need practical skills to manage my time” means looking for a coach that is able to provide relevant input or techniques. Or, “I have a big decision to make between two different roles” means prioritising a coach that challenges people to think deeply about purpose. We would suggest that while limiting the number of coach options is possibly useful, actual matching to one specific coach is not an exact science. While fancy algorithms can assist by using AI to ‘match’ described needs to coaches who have indicated being able to meet those needs, in the end the final choice is best made by the coachee. Do not underestimate the power of intuition in guiding a coachee to select their own coach by their unique needs.

### **3.4.3 Preparation for individual coaching sessions:**

What brief/ support is given to the coachee to prepare for session one. A helpful question to consider before a coaching session is, “What will success look like for me at the end of this session?” What self-discovery assessments exist/ will be conducted in preparation for session 1 (e.g. 360-feedback, INSIGHTS etc.)?

### **3.4.4 Coaching agreement & triad session with line manager:**

After the first coaching session, the coachee and the coach agree the terms of their coaching agreement and commit to a first draft in writing. Because business coaching focuses on both personal and professional performance, the coaching agreement may cover the relationship of mutual obligations between the coach and the coachee as well as incorporate the expected outcomes from the line manager. Another way to ensure there is alignment between the organisation and the individual is to conduct a ‘triad session’. This is a coaching session that includes the line manager, to ensure alignment of coach objectives. A triad session is also about articulating or requesting ongoing support for the coachee’s goals and making their achievements and progress explicit.

### **3.4.5 Option to request a different coach or stop the coaching process:**

Consider what happens if coachees cancel sessions and what guideline you could put in place e.g. “Sessions scheduled, confirmed and then cancelled with less than 24-hour notice will be forfeited”

The position about cancellation can vary from the above example and made to fit the ethos and culture of your organisation. However, it must be communicated and consistently applied to all coaching participants.

**3.4.6 Evaluation:** How will success be measured at the end of the coaching engagement? Clear measures need to be identified upfront. There needs to be clarity on HOW success will be measured over time.

**3.4.7 Confidentiality:** All coaches with credible coach training are bound by a Code of Ethics. Confidentiality is key in securing a trusting relationship and so, should be made explicit upfront.

This may seem like a lot to think about, define and manage. Coaching@GIBS differentiates its coach services by supporting any coach intervention with a 'lead coach'. This coach acts as a supervisor to all internal and external coaches, part of a specific programme. The lead coach is responsible for quality control as well as the logistics of selection, matching and management. In addition, the lead coach is able to consolidate key themes that offer visibility to key stakeholders for support of accountability and culture shifts within and organisation. Business coaching is a unique opportunity to harvest key themes within an organisation. Of course, given ethics around coaching confidentiality, these themes will be generalised. However, a consolidated view will provide deep insights into what is working, and what is not. Reports can also look at some of the general challenges faced by a specific group within the organisation.



## 3.5 Guidelines for identifying and appointing coaches

When selecting a coach, Coaching@GIBS suggests considering the following factors:

### i. Internal/ external coaches

As a buyer of coaching, you need to ask, “Will we be using internal coaches from within our organisation? Or will we be using external coaches? Or will we use a combination of both?”

GIBS Market Research (2020) found that 33% of organisations are using **internal** coaches for individual coaching. The same respondents believe that this figure will increase to 80% in the next five years. Also, they do not see a drop in **external** coaching, believing that this will also increase by 72%.

The growth for both internal and external coaches is not surprising, with each offering value in their own way. Key benefits of external coaches include objectivity, fresh thinking and psychological safety (given their distance from internal politics) (Market research conducted by Carnelley Rangecroft Consultancy, 2020). Internal coaches have deep knowledge of the business and organisational culture. Given these different benefits, the research emphasised the value of optimal partnering between internal and external coaches.

A key consideration is how internal coaches will be trained/ educated? Will they hold additional responsibilities or be a full-time internal coach? How will confidentiality be managed? Will the organisation have dedicated internal coaches or will HR or line managers take on coaching in addition to their roles of HR or

line management? Duality of roles is complicated. It is important to note that managers and HR having coaching skills as part of their 'role's toolkit' is different to them being an internal coach. Privacy and impartiality are not completely possible in internal coaching, and confidentiality is more complex.

When recruiting coaches, you may also want prospective coaches to complete a **pre-coaching form** with the following questions:

- **Specify all coach qualifications.**
- **Coaching experience (in years). Include any industry- or subject-specific expertise.**
- **What is your approach to coaching?\***
- **Specify coach supervision details.\*\***
- **Are you a member of a professional body for coaches?**
- **If yes, which body are you a member of?**
- **How long have you been a member of this body?**
- **Are you credentialed with a professional body?**
- **If yes, what is your level of credential?**
- **How long have you had this credential?**
- **What self-discovery tools/ assessments are you accredited/ licensed in (e.g. Belbin's team roles, Insights personality preferences)?**

\*There are various approaches to coaching, influenced by learning, psychology and leadership theories. A coach may choose to specialise in a specific approach or use a blend of approaches in their coaching process. Examples include:

- **Narrative coaching**
- **Gestalt coaching**
- **Integral coaching**
- **Ontological coaching**
- **Systemic coaching**

The approach to coaching should not vastly impact selection. One approach is not necessarily better than another. It is often preference-based. Most important is that the coach's approach is underpinned by a sound theoretical basis. This will ensure rigour and an alignment to sound learning and change principles. A certain approach/ type of coach is often selected because an organisation already has a resonance/ language for that approach. This alignment can be helpful for building momentum and energy. However, it is also useful to understand enough about the various coaching approaches to find points of intersects and to leverage great coaches with different methodologies. Look out for a future GIBS White paper on 'mapping the different coaching approaches' in order to make the best choice(s) for your organisation.

\*\* There is strong motivation for continued professional coach training as well as coach supervision in South Africa. Both are important to maintain the standard of coaching and so, should be considered when making a coach selection.

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## ii. Role of qualification

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Coaches may enter coaching through a variety of qualifications, from a two-day coaching course to a Masters or PhD in coaching. It is important to recognise what level of skills and knowledge your organisation requires for the coaching you plan to offer. If you are expecting the coach to work with executives or coach to complex strategies, you might want your coach have a formal coach credential or Masters in Coaching. If you are using coaching for first time job entrants, a good training programme in coaching may be sufficient. Be aware that rates may vary given qualifications and experience. Rates are discussed in more detail later.

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## iii. Role of experience

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Coaches do not need to be subject matter experts as they are not working as mentors or trainers. A business coach should understand business and the key drivers of business. These include factors like ethics, governance and broad based financial measurements. It is useful to assess if the coach's experience is broadly context-specific without being role-specific e.g. the coach understands how manufacturing environments operate (context-specific) but is not an engineer designing the machinery (role-specific).

Contextual experience may vary – some coaches have extensive experience in a particular industry. Others may have significant experience in the non-profit sector or understand global companies. In coaching, contextual experience, as opposed to role experience, is prioritised. Ensure that the level of experience you require from your coach is appropriate for the level of expected coaching. Of course, in addition to contextual experience, coaches should also have focussed and deep experience in the coaching process and in coaching skills.

## iv. Role of membership and accreditation of professional body

Coaches can choose to belong to a professional body. This is not a compulsory or legislative requirement. The two biggest professional bodies of coaches within South Africa are COMENSA and ICF. COMENSA is South African-based and ICF is a global professional body. Both the organisations have different categories of membership. It is possible to be a member of the organisation by meeting a few criteria. However, membership is not acknowledging the competency level of the coach. Both organisations have three categories/levels of competency. Coaches then apply to be credentialed at a particular level. A credentialed coach therefore means that there has been an assessment of the coach's ability against certain competencies.

The coach credentialing process usually includes aspects like: number of training hours in specific competencies; an assessment of those competencies; having been mentored by an experienced coach; and a certain number of hours of practical coaching experience (which is logged).

Given the recent influx of coaches, these bodies help to regulate the industry and serve as quality control. Look out for the future GIBS output on 'mapping the various coaching professional bodies' in order to understand the respective benefits of different professional bodies and match to your organisation's needs. Business coaching is also different, given its goal-orientation and strong emphasis on action and accountability. Being part of a professional body suggests that you, as coach, understand the business coaching model. Also, being a member of a professional body suggests that the coach aligns to Code of Ethics. This is essential in nurturing a relationship of trust with a coachee.

If you require different criteria to a professional body, then you may want to define your own competencies and assessment as an organisation.

### THE BELOW TABLE SHOWS LEVELS OF CREDENTIALING FOR ICF AND COMENSA:

COMENSA ACCREDITATION REQUIREMENTS		
	Hours coached	Hours trained
CCP Certified coach practitioner	150	60
CSP Certified senior coach practitioner	750	120
CMP Certified master coach practitioner	2000	200
ICF ACCREDITATION REQUIREMENTS		
ACC Associate certified coach	100	60
PCC Professional certified coach	500	125
MCC Master certified coach	2500	200

There are other local, regional and global professional bodies too.

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## v. Rates guidelines

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Coach rates will vary according to the factors listed above – qualification, experience, membership of a professional body, coach credential or not.

Rate/ fee of the coach is an opportunity for customisation. The rate offerings are complex and many coaches have a variety of tiers that are offered in different circumstances, for example junior managers at one rate, executives at another rate; or rates for non-profit organisations.

Factors that may impact rates include but are not limited to:

- **experience and qualification of the coach (10 years' experience and a masters degree in coaching might differ in rate from a person with a short training programme and very little experience in coaching);**
- **coaching as part of a package inclusive of other services. For example, coaching offered as part of a broader leadership development or consulting project;**
- **executive coaching is often more expensive, given that it might require an advanced coaching skillset and level of experience; and**
- **many coaches choose to work for a third-party consultancy or business that then markets, designs and engages clients and sells their services for them. Usually there is a margin on this service.**

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## vi. Processes for selection

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There are a few ways to select a coach and match coach to coachee:

1. **Coach is allocated to coachee by HR/ university/ coach provider. This could be random – first four coachees alphabetically get allocated to coach A and then four coachees alphabetically to coach B etc. Or, if a pre-coaching form has been populated, the 'matcher' may spend some time connecting coach to coachee based on coachee preferences and objectives. All good coaches are able to coach almost anyone. However, as previously mentioned, giving the coachee a sense of choice is a powerful way to facilitate rapport and buy-in.**
2. **Coachees read coach resumés and choose their coach based on the written resumé.**
3. **Coachees choose three coaches from resumés and meet with them in a 'chemistry session'. Coachee then selects the coach with whom they most resonated.**
4. **A third party manages the matching process based on coachee interview or pre-coaching form. Coaching@GIBS is able to support a matching process with both consulting services and the new GIBS online portal, which combines automated processes with human genius to ensure the best coaching experience for you and your organisation.**

There are times when a coach cannot be chosen. For example when coaching is part of a group process of a leadership development program; or there is only one coach employed by the organisation. Coaches are skilled to work with any person. However, **given the importance of resonance from the coachee's perspective, allowing the coachee to choose their coach may be a prudent choice. If a coach is pre-selected or placed, increase coachee buy-in by emphasising both the credentials and experience of the coach and the empowered position of the coachee in directing the coaching engagement.**



## 3.6 Measurement and evaluation of coach services

Many learning interventions have used the Kirkpatrick (1996) model of evaluation. It measures:

### **Level 1 – Reaction:**

Did I enjoy it, find it valuable?

### **Level 2 – Learning:**

What did I learn?

### **Level 3 – Behaviour change:**

Did my behaviour change?

### **Level 4 – Organisational performance:**

Did this impact on the organisation in any way?

Given that coaching is a learning intervention, this and other learning assessment models can be applied to measure coaching success. **The most important question to ask at the beginning of the process is, how will we measure success at the end?**

### **LEAD COACH AND REPORTS**

As mentioned, when several people are being coached by different coaches (in an organisation or on a leadership development programme), there is value for a lead coach/ coach supervisor to manage the coaching engagement. The role of this lead coach/ supervisor is to manage alignment, consistency, quality, ethics as well as communication to the client organisation. This can also include development and professional supervision of coaches.

A lead coach can also consolidate all coach reports for the organisation, sharing overarching key themes and action points.

Coaching@GIBS recommends that, when reports are written, they are co-created with the coach and coachee in the interests of transparency and trust. It is often important to get the coachees own internal sense of what has shifted and the impact of this on their external environment.

Reports throughout the process can be provided on basic data like attendance and completion. These reports can also include ‘themes’ discussed, progress (as gauged by both coach and coachee) and recommendations for the organisation to further support the coachee. An online coaching platform, such as the GIBS online coaching system, provides access to real-time tracking, coaching themes, and coaching reports. This can add significant value to organisations who need to report on coaching initiatives in relation to their broader strategic aims, while respecting confidentiality.

### **ASSESSMENTS**

Assessments can be used to measure success over time. For example, 360-feedback at the beginning and end of the process demonstrates change over time.

### **TRIAD SESSIONS**

As mentioned, triad sessions with line manager, coachee and coach are another way of measuring change over time and embedding change in the interactions between coachee and manager. In the first triad session, deliverables are contracted at the start of the coaching engagement. These deliverables are assessed over time during and at the end of the coaching in a three-way discussion with line manager, coach and coachee.

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## 4. Sustaining a coaching culture

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Your organisation's culture, history and learning and development ethos will all impact how coaching lands within your organisation.

It may be useful to consider the following:

- 1. Develop a coaching language:** Fortunately, coaching is no longer a foreign concept but the language associated with it may just be. How can coaching be interwoven into every day managerial 'speak'?
- 2. Adopt a human-centric approach:** You are reading this guide because you care about people development. Make this explicit in your coaching comms. Answer this question for leaders, "What's in it for me?"
- 3. Prioritise clarity:** This guide demonstrates that there are many ways to use coaching as part of a leadership development tool. Be clear about the various options and make sure that guidelines on how to interact with coaching are explicit. In other words, make it easy for employees to engage.
- 4. Sweat it:** Be smart about using coaching in all the ways applicable to your organisation: e.g. manager as coach skills for middle managers, internal coaching for 'on the job support', a mentoring programme that links learning partners together across the organisation (and skills training on coaching skills that support mentoring), and external coaches for defined needs like executive leadership coaching, high potential coaching etc.
- 5. Leverage your sponsors:** Great leaders use the language of the people. Leverage your sponsors to understand the core needs and appropriate messaging for your people. Have regular check ins on progress. It is useful to continually evaluate what is working and what is not. Leverage your coach sponsorship team to make adjustments as needed.
- 6. Be fussy:** Having the right coaches for your organisation will certainly impact the coaching culture. Be clear about what is important to your organisation. Take your time in selecting coaches. Do consider a diverse panel of coaches to support a more personalised matching process.
- 7. Lead by example:** A coaching mindset encourages listening and questioning. Do both. Listen to the needs of your organisation. Ask questions to support your thinking and decision-making. Collaborate with your partners in thinking through this strategy. Be guided by a clear vision that empathises with the needs of the people. Be open to options.
- 8. Measure success:** Remember to ask upfront, "What will success look like at the end of this?" Attach a timeline and clear measures of success.
- 9. Make it explicit:** Having a governance policy (see Part 3) will ensure that there is organisational alignment on process.
- 10. You are not alone:** Consider a third party, like Coaching@GIBS, to support you in developing and deploying your coach intervention.

From all of us at Coaching@GIBS, we wish you continued success in your coaching programmes to help facilitate learning, growth and leadership within your organisation.

Please do keep in touch at  
Coaching@GIBS.co.za

Find many other Coaching resources at:  
<https://www.gibs.co.za/coaching/pages/coaching-resources.aspx>

We look forward to hearing from you!



# 5. Checklist for developing a coaching culture within an organisation

ACTIVITY	ACTION	YES	NO – REASONS
Define and communicate Coaching/ Mentoring definitions	Defined and shared		
Decide on split between Individual/Team /Group coaching	Allocated to categories		
Recognise when to use Virtual/ In room coaching	Defined and communicated, logistics in place		
Establish coaching guiding coalition	Select and appoint members to coalition		
Develop purpose statement for coaching	Ensure it captures all principles and values underpinning the coaching ethos		
Have a guideline for selecting and appointing coaches	Communicate and implement as per the guideline		
Agree on duration and frequency of coaching	Clarify duration and frequency to all Clarify cancellation policy		
Have a process for identifying the coachees to be coached	Use list re internal/ external and qualifications and experience, membership and accreditation of professional bodies to guide selection and rates		
Design an evaluation process for coaching	Do this upfront prior to coaching commencing		
Continually review for sustainability and improvement			



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# Appendix A:

## Authors and researcher

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### NATALIE VAN DER VEEN



Natalie is a trained business coach (ICF ACSTH) and facilitator. With a deliberate blend of marketing and coaching skills, she uses human-centric methods and ideas to research, write and consult in impactful marketing, leadership and the future of work.

Previously, Natalie worked at Africa's leading business school, The Gordon Institute of Business Science, focusing specifically on personal learning processes and application. Natalie has experience in both the design and delivery of customized leadership development programs for corporates across industries. She blends her multinational marketing experience with her capacity as a consultant and coach to understand drivers of human behaviour. She strives to ensure that all learning experiences are made personally meaningful so that this relevance translates into transformation, impact and sustainable change in the workplace. With many studies in Creative Writing and Literature, Natalie is an experienced writer, with a fascination of how language and stories shape our experiences of the world. She is deeply passionate about human-centric leadership and the future of work. To this effect, she has published various articles and case studies. She enjoys working with intentional individuals and organizations that prioritize balance, collaboration, inclusion and sustainability.

### ALISON REID



Alison is an accredited professional business coach and the Director of the Personal and Applied Learning Department, leading the Coaching and Facilitation functions at the University of Pretoria's Gordon Institute of Business Science (GIBS). Prior to joining GIBS, she ran her own consultancy, as well as working in clinical and academic Brain Function settings, in the Middle East and in South Africa. Alison is an educator, researcher and coach, holding a Masters degree in Executive Business Coaching and accredited with the ICF (International Coaching Federation), AoEC (Academy of Executive Coaching) and ISPSO (International Society for the Psychoanalytic study of organizations). Alison is passionate about human-potential. She believes that human-specific skills like creativity, emotional & social agility, critical thinking and sense-making will increasingly become the key differentiators in tech-dominated workplaces as well as a catalyst for healthier, more connected and responsible societies. With the right motivation, awareness and support, human beings are able to connect, collaborate and solve the largest problems facing us as a species for a space where all can thrive.

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Natalie has recently completed a research project on developing learning theory based on the lived experience of students. She is also leading the GIBS Coaching Landscape Index. She values research and enjoys the field of qualitative research with an emphasis on phenomenology, grounded theory and autoethnography. Natalie enjoys the different roles of coach practitioner, educator, researcher and writer, but defines herself as a leadership and learning activist and believes we need to change the way the world can learn through conversations.

She has always been passionate about coach education and was one of the early pioneers in developing coaching qualifications in South Africa. After attending many international conferences and networking internationally, she joined Wits Business School (on a 70% contract) as director of The Leadership Development Centre with the strong desire to develop a university coaching qualification (2006 to 2011). She was responsible for customising leadership programmes for corporates. She also developed several qualifications, designing the curriculum, resourcing the faculty, and obtaining approval for the qualification. This culminated in her developing the Master of Management in Business and Executive Coaching.

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