



A toolkit for possibility:

Creating a coaching culture at your organization

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Mission of the AICPA Women's Initiatives Executive Committee

Promote and support the success of women to advance
the profession together.

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Introduction

We created this toolkit to support leaders who want to foster a coaching culture within their organization – to help you envision new possibilities and provide some guidance on how to make them a reality.

There are many different ways to foster a coaching culture, and it takes an investment of time, energy, resources and consistent small steps over time to create true cultural change. Please use this toolkit as both an educational resource and a framework to create a coaching program that you can build upon over time.

We hope this guide inspires you to forge a unique path that fits your own organization's vision, objectives and culture.



About the Authors

Intend2Lead is a leadership development company that coaches accountants to access the Dimension of Possible through leadership coaching, consulting and group learning. For more information about Intend2Lead:

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What is coaching?

Coaching is a term broadly used to describe a variety of developmental practices. For the purposes of this toolkit, we use the International Coach Federation (ICF) definition:



Coaching is partnering with an individual (a “coachee”) in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

Who is the ICF?

The International Coach Federation (ICF) is the leading global organization dedicated to advancing the coaching profession by setting high standards, providing independent certification and building a worldwide network of trained coaching professionals. One of ICF’s founders, Thomas J. Leonard, was a CPA. When working with people on their finances, Leonard realized that most people did not know what they valued, or how to build a life that reflected those values. These experiences contributed to his decision to become a professional coach.

Coaching is a developmental tool that helps the coachee (the person being coached) unleash latent potential by allowing him or her to uncover and overcome specific challenges. The coach is not an advice-giver but instead acts as a facilitator. Coaching puts the coachee in charge of his or her own coaching goals, empowering the individual to achieve more meaningful and sustainable results. Simply put, coaching helps someone discover what they want and identify paths to the desired results.



The ICF developed the following framework of 11 core competencies to support greater understanding about the skills used in coaching and to train and evaluate professional coaches:



Refer to Appendix A for further information on these core competencies and the benefits they create for the coachee. Source: International Coach Federation, coachfederation.org/core-competencies

How is coaching different from other professional development structures?

There is great value in offering a variety of programs to support the development of professionals in your organization. Each one complements the others and provides its own unique benefits to an individual's development.

Let's distinguish between these various support structures and how coaching is different.

Mentor — A mentor could be someone formally assigned to you at your organization to support organizational initiatives, including performance management or diversity and inclusion. A mentor could also be someone, inside or outside your organization, you informally sought out on your own for support. A mentor is usually someone who has “been there, done that.” A mentor commonly shares stories with you and provides advice, so you can learn from their experiences. The mentee learns from the mentor.

In contrast, your coach does not give advice as a mentor does. Instead, your coach serves as a facilitator to help you discover your own learning and path forward. Rather than teaching you, your coach helps you tap into your innate wisdom and resourcefulness so you can learn from your own experiences.

Sponsor — A sponsor is someone within your organization who is in a position of authority. A sponsor will advocate for you to get a promotion, a raise or assignment to a new project. A sponsor talks about you to others and has the ability to influence your career trajectory. A sponsor does not necessarily help you learn; rather, a sponsor advocates and creates opportunities for you.

Performance adviser — A performance adviser is someone at a higher level in your organization who reviews your performance and development goals with you. The performance adviser relationship is often instructional (i.e., teaching) and evaluative in nature.

Coaching can be a great, complementary approach for a performance adviser to use to help you uncover your own development goals and ideas for how you might reach them.

Counselor or therapist — Counseling and therapy are typically done outside of a professional environment. A counselor or therapist helps individuals heal from past trauma to become whole; thus, they focus more on the past (e.g., What happened in the past that needs to be healed, so you can live a healthier life today?).

In contrast, a coach assumes you are already whole. Rather than diving into the past, a coach helps you envision and create your desired future.

What is a coaching culture?

An organization with a coaching culture harnesses the power of coaching to unlock the potential of each of its people and the organization as a whole.

An organization with a strong coaching culture is characterized by:

- Leaders who hold a deep belief in the talents and resourcefulness of their team members and are committed to helping each individual unlock their unique potential
- High levels of trust and open communication. People feel heard and understood and do not shy away from challenging conversations
- An environment that supports direct, continuous feedback
- A growth mindset, in which challenges are welcomed as learning opportunities
- Comfort with ambiguity, embracing the power of a question and letting go of having to know all the answers
- High levels of engagement and collaboration between all employees
- An ability to attain clarity, meaning and direction on all important endeavors, including meetings, projects, development plans and organizational initiatives
- A feeling of connectedness within the workplace. Each individual feels valued and respected for who they are and the contributions they make to the collective success of the organization

Why coaching? Why now?

If you're reading this, you're probably aware the accounting profession faces many challenges as we navigate our path into the future in a fast-changing business environment. The need to develop our leaders differently has become increasingly critical.

The prominent, traditional approach to performance management in the accounting profession has been competency-based, in which organizations focus on managing people to achieve external metrics and observable behaviors (the "Outer Game").

Professional coaching provides a more powerful, customized and innovative approach to leadership development — one that is needed now, more than ever, in today's fast-paced world. By focusing on the Inner Game (i.e., an individual's thoughts, feelings, desires, fears and emotions), as well as the Outer Game, coaching can produce more meaningful, lasting results. Using this inside-out approach, coaching helps an individual understand the results they are exhibiting in their Outer Game. This unleashes an individual's creativity, which in turn creates individual and organizational breakthroughs.

Let's take a deeper dive into the changes our profession faces and how coaching can help individuals and organizations thrive in this shifting landscape.

The pace of change has never been as rapid as it is today — and it is only accelerating! Continuing to do the same thing the same way is no longer a safe approach. Due to advances in technology and changes in client expectations, the ground is shifting beneath our feet. Although "SALY" (i.e., same as last year) may have worked in the past, it has no future.

Coaching helps individuals personally adapt and supports them in leading others through change. When individuals use coaching skills with others in their organization, they can understand the change process and lead change initiatives with empathy. This ultimately carves out a smoother, more successful path for change.

Technology, including artificial intelligence, is radically reconfiguring the landscape. Compliance services (historically, core components of accountants' services) are becoming more automated. Clients now want us to use our insights to partner with them, as a trusted adviser, to chart their future. To harness the opportunities that the future

holds, we must gain comfort with ambiguity. While it's easy to look back and determine what worked or did not in the past, there is no checklist to ensure we will get it right when we look forward.

Coaching helps people navigate the unknown, collaborate and uncover new solutions and possibilities.

Demographics in the workplace are shifting dramatically. The workforce now includes five different generations (i.e., traditionalists, baby boomers, Generation X, Generation Y or millennials, and Generation Z). The racial and ethnic makeup of the world is also changing, as minorities become the majority in the United States. Our profession's workforce is becoming more diverse, in all senses of the word.

Each of us has inherently unique desires, needs, talents and goals. We must create new business models that support the uniqueness of our next generation of leaders and allow them to contribute to the organization's success in different ways.

Coaching allows individuals and organizations to explore new possibilities and create new models and roles for themselves. Instead of a one-size-fits-all answer, or even multiple-choice options, there are unlimited fill-in-the-blank possibilities! Additionally, group coaching creates an avenue for greater collaboration, helping organizations tap into the many benefits of diversity (e.g., improved creativity, higher innovation, faster problem-solving, increased employee engagement, and more).

Human-to-human skills are critical to success in this radically changing environment. As technology continues to automate more routine aspects of our business, we must rely more on trust, empathy, authenticity, awareness and connectedness. At its core, business is simply humans helping humans.

Coaching cultivates self-awareness, enhances leadership skills and creates opportunities for authentic connection and collaboration with clients, teams and prospects.

As technology automates more in our lives, we yearn to connect with what makes us human. Instead of compartmentalizing our professional and personal worlds, we want to integrate them and live one life, as a whole human being. We want more meaning and purpose in our work. We want real-time feedback. We want to authentically connect to one another beyond a transactional level.

Coaching is the ultimate development tool, as it's customizable to each individual. It honors the uniqueness in each human being, as it helps people uncover what's important to them and discover how to bring more meaning to what they do.

The CPA's role is evolving. We must modify our mindsets (our awareness of how our Inner Game influences Outer Game behaviors and results) and flex our skills to meet the needs of our clients.

Coaching skills help professionals create more success in all aspects of their job, including:

1. Allowing the individual to create new ways of thinking and being that ultimately produce new results.
2. Unleashing team members' potential by developing their resourcefulness and enhancing self-efficacy.
3. Partnering with clients in a meaningful way, helping them uncover what matters to them and co-creating new, unique solutions to address their needs.
4. Growing new business by helping prospects uncover what support they need and helping the accountant identify where they can best serve.

Launching a coaching program: A roadmap

With an understanding of what coaching is (and isn't!), let's explore how you can create a coaching culture at your organization.

There is not one answer, and we encourage you to think of this as an ongoing journey. Creating a coaching culture doesn't happen overnight. Rather, it must be included in your long-term organizational vision and goals and advanced, step-by-step, with continued focus and intention. It is a long-term investment that, when executed well, will reap significant rewards.

Before jumping in, take the necessary time to thoughtfully plan out your approach.

Step 1: Start with why.

It's important to be clear on your purpose for creating a new coaching program:

- Why launch this program? Why now?
- What do you want to achieve?
- What organizational challenges will it address? What impact will it make?
- How will participants and the organization benefit?

Knowing, believing in and speaking about your Why will help you communicate the program's purpose and benefits to others and help them believe in it, too!

Success suggestion: Start from the heart, with a human-to-human focus, then be prepared to back it up with the business case. Heart-felt testimonials of how an individual has personally benefitted from coaching can be very powerful.

These programmatic ideas can help you discover the best starting point for creating a coaching culture (and determine which ideas work best as longer-term goals). Consider your overarching objectives and available resources when prioritizing your change initiatives. Possible purposes or focuses might be:

- Provide career coaching that supports the long-term development of each individual.
- Provide leadership coaching to help specific individuals or groups become more effective leaders (e.g., employees with high potential or those on the partnership track).
- Teach all supervisors on-the-job coaching skills to help them perform in a way that increases emotional intelligence and supports each person's long-term development.

- Teach your people coaching skills to enhance client service, help them transition to trusted business advisers and/or develop new business by honing their ability to actively listen, ask powerful questions and build trust and intimacy in client relationships.
- Support your people during transitional times, such as promotions or parental leave.

Success suggestion: To determine which coaching programs will yield the highest return on investment, examine where your organization experiences the highest employee turnover and/or lowest employee engagement or where you believe there is the most untapped potential (e.g., expanding existing client relationships or generating new business).

Step 2: Establish your key players.

A successful coaching program requires an integrated approach, throughout the organization, from top to bottom.

First, it's critical to have buy-in and support from the executive leadership team.

Whoever is championing the effort should communicate the benefits and proposed steps forward clearly. Allow and respond to concerns or objections.

Other key players include individuals responsible for the organization's People, Talent, Human Resources and Learning and Development functions. (Note: Although Human Resources is a key player, another person or department, such as Learning and Development, should own the coaching function to maintain the integrity, trust and confidentiality of the relationship between coach and coachee.)

Consider whether you may need to partner with an expert outside of your organization. Coaching may not be a natural skill set for accounting professionals who are accustomed to being experts and providing advice to others. Unless you have an ICF-certified coach in-house, it's important to partner with external coaching experts to deliver coaching skills training and development, as needed.

Success suggestion: Seeing is believing! Expose the organization's executive leaders to coaching so they can benefit from it and ask them to personally share the positive impact it has had with their colleagues and teams! Ask them to serve as ambassadors for coaching.

Once you have executive buy-in, pave the way for success by identifying individuals at all levels of the organization to serve as ambassadors. Choose individuals who have already demonstrated a desire to invest in and develop your people.

Step 3: Create a vision and measures of success.

Envision what it will look like when the coaching program is wildly successful! Give yourself enough time to dream big. Choose a date far enough in the future where you can envision the outcome without worrying about how you're going to get there.

Consider these questions:

- What does your ideal organizational coaching culture look and feel like?
- How will you know you've been successful with this coaching program?

- What specifically will be different? What will you see more of? What will you see less of?

You know you have a strong vision when you can clearly communicate it to others in a way that inspires and excites them.

Then, taking that long-term vision into account, think about what success looks like one, three or five year(s) from now. This will help you identify where to start. Consider questions such as:

- What feels like the most meaningful place to start based on your organizational needs and goals?
- What will move the needle most toward your intended goals?
- What feels manageable from a resource/capacity/investment perspective?

Once you have defined your vision, create SMART (specific, measurable, achievable, relevant, timely) goals for the next year, with milestones along the way, so you can track progress.

Success suggestion: Consider piloting the program with a small group in year 1. This is a great opportunity to learn on a small scale so you can expand the program to other groups over time with greater success and feasibility.

Step 4: Determine who is eligible for coaching.

Consider who will be eligible to receive coaching through this program. Who needs it the most? Groups that could benefit include:

- Partners/executives, to help them better lead the organization and create a coaching culture from the top-down
- Partner/executive candidates, to develop the next generation of leaders
- Employees with untapped potential, to help them become stronger contributors
- Employees in diversity and inclusion programs, to support their development and create more long-term opportunities
- Recently promoted employees, to help them take on increased leadership responsibilities
- Employees preparing for and/or returning from parental leave or caring for aging parents, to help them manage increased responsibilities outside of work
- Employees in supervisory/managerial roles, to help them better lead teams
- Employees whose primary job functions are to develop your people (e.g., individuals responsible for Human Resources or Learning and Development).

Success suggestion: Coaching can be provided stand-alone or paired with leadership training. In our experience, most organizations get a high return on investment when they create programs that holistically support their professionals. These programs usually pay for themselves through increased employee retention, engagement and performance.

Step 5: Identify what type of coaching is needed.

Consider what type(s) of coaching the identified coachee(s) will need. Three types to consider include:

- **1-to-1 coaching** – The coachee works directly with a coach, gaining a dedicated, confidential space to dive deep, break down challenges and create a customized plan to overcome them. 1-to-1 coaching is effective at all levels and especially useful for role transitions. It can enhance existing performance management and succession planning initiatives within an organization.

- **Group coaching** – The coachee works together with several coachees and one coach. The coachees may bring similar challenges for coaching (e.g., life or professional transitions), but they could also bring unique, diverse challenges to the group setting. This method can amplify the learning and enhance connection for all involved, as each coachee benefits from the synergy, wisdom, contributions, feedback and encouragement of the others. The coachees in a group may or may not work directly together. Group coaching can be used to enhance organizational learning initiatives, where coachees consume live or on-demand learning and then join the coaching group to discuss how to apply the learning day-to-day.
- **Team coaching** – This is group coaching for a team that works directly together. The focus is on enhancing the team’s performance and/or achieving a common goal, such as increasing team communication and accountability, enhancing client service and breaking down organizational silos. Team coaching unlocks the collective potential within the team by helping them find ways to work better together.

Success suggestion: Providing external, 1-to-1 coaching for a select group of individuals within an organization is a simple and powerful place to start. This will help your organization gain a better understanding of coaching in a flexible and manageable way. As your organization gains more direct experience with coaching, it will feel easier to expand into other, complementary forms of coaching over time.

Step 6: Identify the coach(es).

Consider who will serve as the coach.

Options include:

- Hire professional coaches, either on staff or an external professional coach. Refer to Appendix B for more details and considerations when hiring a coach.
- Train employees and infuse coaching competencies throughout your organization. Examples of ways to apply this approach include:
 - Start a training program to teach on-the-job coaching skills to supervisory employees.
 - Create a development program for performance advisers and/or

career counselors based on the core competencies established by the ICF. This ensures they are well-equipped to serve in this important role. (Refer to Appendix E for a coaching application you can use to identify strong candidates for an in-house coaching team.)

- Incorporate coaching-based skill development into existing leadership development and/or business development training programs.

Step 7: Assign clear roles and responsibilities.

It's important that everyone involved understands who is responsible for what.

Success suggestion: For your rollout, consider not only the part each individual is playing but also who is coordinating for everyone involved. Who is ultimately accountable for the success of the program?

Step 8: Launch a communication campaign.

Communication is critical when rolling out a new program, and even more with a program that could be easily misunderstood. Professional coaching and the ICF's core competencies provide a developmental approach that may differ from other types of coaching your professionals may have experienced. Be clear on what coaching is; distinguish it from other developmental tools or approaches and show how it is complementary.

Start from the top down. Consider who sets the tone at your organization for important new programs. It will most likely be a combination of executive leadership and individuals responsible for Human Resources and Learning and Development functions. Ensure the right players understand what the program is, why it is being implemented, and how an employee can become involved so they can clearly communicate it.

You can't over-communicate this program! Clearly share the elements of the coaching program with all relevant parties (most likely, this includes your entire organization!) and continue to remind them of the program and its benefits at every available opportunity. Since it is likely that coaching will not be available to everyone in the organization (particularly at the beginning

of a new program), clearly explain the program's purpose, and be prepared to discuss why certain groups are eligible for coaching while others are not.

Communicate at all organizational meetings and events, via your intranet, newsletters and everyday conversations. Select coaching ambassadors at all levels of your organization to spread the message. As the program evolves, consider keeping past participants and beneficiaries of the program in the loop so they can share their experiences and testimonials with others to demonstrate the value.

Success suggestion:

Communication is paramount within the coaching relationship. Key points for coach and coachee to discuss include:

- What coaching is and how it differs from other development tools
- The benefits of coaching (Coachees must believe in the value of coaching for it to be successful!)
- The context in which coaching will be used (and when it is not appropriate)
- Ethical considerations, including confidentiality

Step 9: Determine how the coaching will work.

Clearly detail how the program will work, including consideration for the following questions:

- What is the purpose of the coaching program? What will the coaching be used for?
- How will the coaching be carried out (e.g., integrated with existing performance management roles, or as long-term career development, separate from performance management)?
- How will the coachees be selected?
- How will the coaches be selected?
- How will coaches and coachees be matched to ensure a strong fit?

A successful rollout should include coachees who have chosen to be involved, rather than being required to do so. You cannot coach someone who is not open to it. (Refer to Appendix E for a sample application, since an application process can help ensure participants are willing.)

Since coachees must own their development, allow coachees to choose their coach from more than one option. They should also be able to determine their coaching goals and the duration and frequency of the coaching sessions. Both coach and coachee must feel the coaching can adequately support the coachee's needs.

Other pertinent details to establish at the outset of the coaching relationship include:

- Specific coaching goals
- How long the coaching relationship will last
- How coach and coachee(s) can provide feedback to one another and the organization's administrator for the program

Success suggestion: Coaching works best when there is a great fit between coach and coachee. To that end, coach or coachee should be able to terminate the arrangement at any time if the relationship is not a good fit (e.g., lack of chemistry, a perceived conflict of interest, coachee is not invested in the process, etc.)

Step 10: Develop your coaching team.

Ensure the coaching team is trained in the ICF Core Competencies as outlined in *What is coaching?* If you are developing coaches in-house, a strong coaching development program should include theory as well as practical learning. It takes time to learn new skills, so deliver training in bite-sized pieces, with plenty of opportunities to practice (including supervision and feedback from mentor coaches) along the way.

Next (or while training your coaching team), ensure the coaching relationship is adequately documented. An external coach should take care of this for you. If you are developing coaches in-house, create the necessary coaching forms and a success toolkit(s) for the coaches to use. This should include a standard coaching agreement that clearly delineates how the coaching relationship will work, to be signed by both coach and coachee (refer to Appendix F for an example), and other training tools or resources to support the coaches.

Success suggestion: If you are developing an in-house coaching team, the best way for them to gain expertise is through real-life practice. Be sure to provide continued learning opportunities, including formal skill development, supervision and mentoring from more experienced coaches, and opportunities for the coaches to share their experience and learning with one another.

Evaluating success

At the beginning of the program, set dates for when you will gather feedback and measure milestones. Check progress regularly and consider who should be providing feedback and how frequently, specific, measurable and qualitative feedback should be gathered. Ways to do this include:

- Asking coaches:
 - How do you think your coachee is progressing?
 - Does the coachee need further development?
 - What themes are you noticing from the coaching?
 - What changes should be made to improve the program?
- Asking coachees:
 - What's working well?
 - What could be improved? How and why?
 - How is coaching helping you reach your goals?
 - What specifically has the coach done that has been most supportive in helping you achieve your goals?

- Why would you recommend this program to others?
- What has been your experience of the program and your coach?

Feedback should be kept confidential. When asking coaches and coachees for feedback, do not ask for identifying details but focus instead on high-level themes, progress on coaching goals and key takeaways.

Success suggestion: Change takes time, and things can get messier before they improve. This is a natural and necessary part of change. The coachee is being asked to let go of who they have been for who they can become. There may be times when a coachee is unhappy about the coaching experience. Keep this in mind in determining when and how you solicit feedback.

Conclusion: Prepare for possibility!

We hope you'll find the information in this how-to guide supportive in creating a coaching culture at your organization. Remember, true, sustainable change takes time, and it's accomplished step by step. Plant the seeds of coaching, one-by-one, and patiently cultivate them. Trust in the

process — even if it stirs up some surprises along the way (this is a necessary and valuable part of change!). Soon, you will see these seeds blossom and create incredible new possibilities for your people and organization beyond what you can even imagine today!

In addition to this toolkit, the **AICPA Women's Initiatives Executive Committee** has also created resources related to mentoring and sponsorship:

- The AICPA Online Mentoring Program: aicpa.org/mentoring
- The CPA Firm Sponsorship Success Toolkit: aicpa.org/womenlead
- The AICPA Mentoring Toolkit: aicpa.org/womenlead

For more information about the resources created by the AICPA Women's Initiatives Executive Committee, go to aicpa.org/womenlead.

Appendix A: ICF Core Competencies

The following table includes a summary of the ICF Core Competencies and how they specifically benefit the coachee. Please refer to the ICF's website for the complete listing of Core Competencies: coachfederation.org/core-competencies.

| Summary of ICF Core Competencies | Benefits to the coachee |
|--|---|
| <p>Setting the foundation</p> <p>Just as a CPA protects sensitive and confidential information, a coach must maintain confidentiality and due care in the coaching relationship. Confidentiality extends to communications with the coachee, as well as any related records or electronic files.</p> <p>A coach must clearly communicate the distinctions between coaching and other support professions (e.g., consulting or psychotherapy), and when appropriate, refer the coachee to a more appropriate support professional.</p> <p>Similar to what is accomplished in the CPA's client engagement letter, the coach and coachee must agree on a clear definition of the coaching relationship, the roles of each party and other pertinent details (e.g., logistics, scheduling, etc.).</p> <p>In each coaching conversation, the coach must ensure that both coach and coachee are clear on the agenda and desired outcomes of the conversation.</p> | <p>The coachee receives a safe place to explore challenges, without fear of judgment. Most developmental challenges are complex and multi-layered. When the coachee feels safe to share what is really going on, the coach can help peel back the layers and get to the heart of the matter. This is where true, sustainable change happens.</p> <p>The coach honors the coachee as the expert on his or her life. No one can better understand an individual's aspirations, challenges and environment than the person living that life! Thus, the coachee sets the agenda and desired outcomes. This empowers the coachee to feel in charge of his or her own life, building confidence and self-efficacy.</p> <p>The coach does not give advice but instead empowers the coachee to build his or her own resourcefulness and self-direct the coaching. This increases leadership capacity in a permanent way, extending the benefits well beyond the stated coaching objectives or the duration of the formal coaching relationship.</p> |

Co-creating the relationship

For coaching to work, the coach must provide a safe, judgment-free space for the coachee's self-discovery and growth. The coach cultivates mutual respect and trust by showing genuine care for the coachee's well-being and demonstrating personal integrity, honesty and sincerity in all interactions. The coach champions the coachee's risk-taking and new behaviors, is sensitive to fear of failure, and respects his or her learning style and perceptions.

The coach aims to be fully present in all coaching interactions and can flex the coaching style to suit the coachee, including being present with the coachee when/if strong emotions arise.

Coaching provides the coachee with dedicated time, space and energy (in an otherwise chaotic, busy life) to focus on what matters most and strategize on how to attain it. Coaching is all about the coachee, not the coach (It's rare in this day and age, and especially in a client-service profession, for someone to receive such a gift)! When the coachee feels safe to explore and overcome challenges and fears, true progress is made.

Communicating effectively

The coach must actively listen, distinguishing between words, tone of voice and body language, to hear what the coachee is saying and not saying. Through listening, the coach can attend to the coachee's agenda and ensure his or her goals are being met. Through active listening, the coach can reflect back, summarize or "bottom line" what the coachee is expressing.

The coach cultivates greater clarity, insight and understanding in the coachee through the use of powerful, open-ended questions. The coach's questions move the coachee towards what he or she desires.

The coach communicates directly, using language that is appropriate, respectful and has the greatest positive impact on the client.

Coaching provides space for the coachee to identify and articulate thoughts, emotions and beliefs about self, others and challenges. Coaching allows the coachee to "talk it out," so he or she can tap into the power of the rational mind to tackle the challenge. When the rational mind is stuck and unable to solve a problem, the coach can help the coachee "get out of their head." The process can stimulate creative new ways of thinking and doing.

Facilitating learning and results

The coach facilitates a process to help the coachee identify the goals that will drive the coaching relationship. Goals should be SMART (i.e., specific, measurable, attainable, relevant and timely). The coach approaches each individual coaching conversation, and the overall coaching relationship, in a way that helps the coachee move toward these goals and allows for their evolution.

The coach and coachee collaborate to design new actions to help the coachee attain desired results. This is an experimental, learning process, where the coachee explores alternative ideas and solutions, tries new behaviors, learns from them and evolves them.

The coachee is ultimately responsible for his or her actions and results. The coach's role is to provide support and accountability.

For the coachee to achieve new results, he or she must clarify specific, desired outcomes and gain a new perspective. A great coach helps the coachee dig deeper into the matter at hand, using inquiry to help him or her gain greater self-awareness and understanding of situations or behaviors. This helps the coachee discover new ways of thinking, being and acting to achieve desired results in a meaningful, sustainable way.

Coaching helps the coachee clarify his or her future vision and develop meaningful goals. It allows the coachee to periodically evaluate progress and creates natural accountability, meaning and purpose. It gives the coachee the chance to practice and evolve leadership skills and ultimately maximize his or her positive impact on others

Appendix B: Who should coach?

Organizations have a choice between hiring or developing in-house coaches, contracting with external coaches, or a combination. Use this worksheet to determine which one is best for your organization's particular needs.

| Considerations | Solution: Hire an internal coach | Solution: Hire an external coach |
|---|--|--|
| Benefits: We want a coach who will: | <ul style="list-style-type: none">• Understand the culture of the organization and industry.• Be more cost-effective (for a larger organization).• Serve as a strategic thought partner to executive team, Human Resources and Learning and Development. | <ul style="list-style-type: none">• Be independent and objective, both in fact and appearance.• Bring leadership development tools and expertise the organization may not have in-house.• Offer an outside perspective that is not available to those within the organization or industry. |

| | | |
|--|--|---|
| Trade-offs: Issues we want to avoid include: | <ul style="list-style-type: none">• A time-consuming search for professional coaches who will fit well with your organizational culture• Greater expense (for a larger organization who could hire an internal coach)• Coach's lack of familiarity with our organization and/or industry | <ul style="list-style-type: none">• Coachees' concerns about confidentiality• Lack of diversity in coaching styles/methodologies or fit between coach and coachee due to smaller coaching team• An internal coach may become biased.• Challenges to the efficacy of coaching if coach is spread thinly across other organizational initiatives |
|--|--|---|

Considerations when hiring an external coach

For the organization:

Organizations who wish to engage the use of professional coaches may first want to consider the following when interviewing potential coaches:

1. Is the coach credentialed by the ICF? _____
 - A. If so, consider whether their level of experience meets the complexity of your coaching needs. The ICF offers three levels of credentials:
 - Associate Certified Coach (ACC) – 60 hours of training, 100+ experience hours
 - Professional Certified Coach (PCC) – 125+ hours of training, 500+ experience hours
 - Master Certified Coach (MCC) – 200+ hours of training, 2,500+ experience hoursIn addition, a professional coach must demonstrate varying levels of mastery of the ICF core competencies for each respective level.
 - B. If not, inquire about the following:
 - How many hours of coach training have they completed?
 - Has their coaching been supervised and evaluated?
 - What are their professional standards for confidentiality, record-keeping and referring clients to more appropriate support professionals, as needed?

Choose a coach who can quickly earn the trust and respect of professionals within your organization. There are times when you also might want a coach who can bring a new perspective to an individual or your organization. Ask:

2. What is your background and experience? What is your coaching philosophy? Who are your ideal coachees?

3. What has been your experience working with clients of diverse backgrounds (generation, gender, race/ethnicity, global geography, etc.)?

4. What was the philosophical stance of your coach training and how does this show up in your work?

5. What is your educational background? Did you have another career before coaching?

6. How do your engagements work (e.g., duration, frequency, rate, process)?

7. What, if any, leadership development tools (e.g., assessments) do you use? Why did you choose such assessment(s), and how does it fit into the coaching?

8. Can you share client testimonials or references? _____

Best practices for hiring external coaches include:

Create a roster. Individuals responsible for Human Resources and/or Learning and Development functions can evaluate and select coaches. Ideally, provide employees with 2–3 coaching choices so they can find a strong fit.

Consider the level of involvement of others. In some instances, the best approach is for the coach and coachee to work alone together without anyone else involved. In other cases, the sponsoring organization may want to be more involved through stakeholder interviews to support agreed-upon goals.

Create a consistent process. Be clear about who is eligible to receive coaching and when it is appropriate. Ideally, the coaching experience is seen as proactive — a reward for high potential employees whom the organization believes in and wants to invest in more fully.

Be intentional with communication from the start. When approaching an employee about the prospect of working with a coach, it is important to share that:

- You see great potential in them, and this is an investment in their future success.
- Coaching is a highly supportive and confidential process.
- Coaching isn't another responsibility, but rather can help the individual become more efficient and effective in their current responsibilities.

For the individual:

If you are interviewing a potential coach, questions to ask include:

1. How have you helped others with similar challenges? What were their results?

2. What type of coaching do you specialize in? What type do you steer clear from?

3. What type of clients do you work best with?

4. Describe your process.

5. How have you used coaching yourself? (Hint: Be wary of coaches who haven't received coaching themselves.)

6. What can I expect from you?

7. What will you expect from me?

8. How would we get started?

9. Do you use a formal coaching contract? If so, what does it involve?

In addition to interviewing potential coaches, it's important for you to do some self-reflection as well. Consider asking yourself the following questions:

1. What qualities are most important to me in a coach?

2. What are the most important aspects of the coaching process for me?

3. After an initial interview, am I clear on what coaching is with this particular coach and what it is not?

4. How do I feel about this person in terms of trust, chemistry, confidentiality, experience and competence?

5. Can I easily see how this coach can help me create a powerful development process to help me overcome my challenges?

Appendix C: Implementation checklist

Use this roadmap, which synthesizes the toolkit details, to support your organization's planning and implementation.

Step 1: Start with why.

- Why launch this program? Why now?
- What do you want to achieve?
- What organizational challenges will it address? What impact will it make?
- How will participants and the organization benefit?

Step 2: Establish your key players.

- Gain executive leadership buy-in.
- Engage other key players, such as people, talent, Human Resources and Learning and Development functions.
- Identify potential outside experts.

Step 3: Create a vision and measures of success.

First, craft a long-term vision of success:

- What does your ideal organizational coaching culture look and feel like?
- How will you know you've been successful with this coaching program?
- What specifically will be different?
- What will you see more of? What will you see less of?

Then, consider where you should start:

- What feels like the most meaningful place to start based on your organizational needs and goals?
- What will move the needle most toward your intended goals?
- What feels manageable from a resource/capacity/investment perspective?

Finally, create SMART (specific, measurable, achievable, relevant, timely) goals for the next year, with milestones along the way to track progress.

Step 4: Determine who is eligible for coaching.

Who needs coaching the most?

Step 5: Identify what type of coaching is needed.

- What type(s) of coaching will best support the coachees?
 - 1-to-1 coaching
 - Group coaching
 - Team coaching

Step 6: Identify the coach(es).

Who will serve as the coach?

Hire professional coach(es) on staff

Hire external professional coach(es)

Train employees in coaching competencies

Step 7: Assign clear roles and responsibilities.

Ensure that everyone involved understands who is responsible for what.

Step 8: Launch a communication campaign.

Clearly communicate what coaching is and how it differs from and complements other developmental tools or approaches.

Start from the top down. Consider who sets the tone at your organization for important new programs.

Communicate at all organizational meetings and events, via your intranet, newsletters and everyday conversations.

Select coaching ambassadors at all levels of the organization to spread the message.

Step 9: Determine how the coaching will work.

What is the purpose of the coaching program? What will the coaching be used for?

How will the coaching be carried out (e.g., integrated with existing performance management roles, or as long-term career development, separate from performance management)?

How will the coachees be selected?

How will the coaches be selected?

How will coaches and coachees be matched to ensure a strong fit?

Have you empowered the coachees where possible, allowing them to choose their coach, coaching goals, and duration and frequency of coaching sessions?

Step 10: Develop your coaching team.

Ensure the coaching team is trained in the ICF Core Competencies.

Ensure the coaching relationship is adequately documented.

Appendix D: Coaching program announcement

Dear Team Members:

Today, I'm pleased to introduce a new strategic initiative that will ultimately benefit everyone in our organization by enhancing our culture. We're launching a coaching program that we believe will:

- Promote high levels of trust, engagement and collaboration between all employees.
- Deepen our team members' feeling of connectedness within our organization.
- Foster an environment that supports direct, continuous feedback.
- Develop a growth mindset, in which challenges are welcomed as learning opportunities.

We are committed to helping you maximize your professional and personal potential, and we believe this coaching program supports that.

[include specific firm information on:

- Where to get or watch for more information, including how further communications will be handled.
- Next planned steps in the process
- Any further, more specific details on why this matters to the firm]

This is an exciting new endeavor for our firm, and we're looking forward to sharing it with all of you.

Sincerely,

[MEMBER OF FIRM LEADERSHIP]

Appendix E: Coaching applications

For the coachee:

Coaching will be more effective if coachees understand what coaching is and how it can specifically support their development. These questions can help coachees evaluate their need and readiness for coaching and help an organization make effective coach-coachee matches.

1. Why are you seeking coaching? What do you most want to achieve through coaching?

2. How will this achievement affect your career and life?

3. Why do you believe that now is the right time for you to receive coaching?

4. What approaches to change have you found more or less effective for you?

5. What do you need most from your coach?

6. What responsibility are you ready to take on to ensure the coaching relationship works well?

7. How will you know your coaching experience has been effective?

For the prospective in-house coach:

If you are developing a team of your professionals to serve as in-house coaches, it's important to identify candidates who truly want to develop others. Use the following questions in an application to assess a candidate's desire and readiness to participate in an in-house coach development program.

1. What excites you most about this coaching program?

2. Why do you feel you are ready to join this program as a coach?

3. How do think being a member of this coaching team will affect you?

4. How do you define coaching?

5. Please describe any experiences with coaching up to this point, as a coachee or a coach.

6. What is unique about you that may help you be a good coach?

7. Which aspect of coaching do you expect to be the most challenging for you? Why?

8. How do you think you and this coaching program will impact the people you work with and this organization?

Appendix F: Coaching agreement

This document is a basic coaching agreement intended for use with an in-house coach.
(Note: If you hire an external coach, the coach should provide their own coaching agreement.)

Coaching agreement

Coach: _____

Coachee: _____

Purpose and nature of the coaching relationship:

Coaching is a coachee-driven and coachee-focused process. Coachee enters into this coaching agreement with the understanding that coachee is responsible for creating his or her own actions, decisions and results. Coachee also agrees not to hold coach or the organization liable for any actions or results for adverse situations created by coachee actions as a direct result of conversations with coach. The coaching relationship is in no way to be construed as psychological counseling or any type of psychotherapy.

Coaching sessions:

The term of this coaching engagement is _____ months, starting on _____ and ending on _____.

A coaching session is a [conference call, video-conference call, or in-person meeting] between both of us, focused on coachee's development and agreed-upon desired outcomes. We will hold _____ sessions per month at mutually agreeable times. Each of us, when possible, will provide 24 hours' or more notice if a change needs to be made to a session time/date.

Should coachee fail to attend two coaching sessions during our coaching relationship (without notification or rescheduling), we will evaluate whether or not coaching is appropriate for coachee right now. This agreement may be terminated at any time by either party.

Confidentiality

Coach will not, at any time, either directly or indirectly, divulge, disclose or communicate in any manner any information to any third party without coachee's prior consent, unless required by law, or if there is intent to do harm to others, company theft, or reports of harassment on the job.

Signatures

Our signatures on this agreement indicate an understanding of, and agreement with, the information outlined above.

Coach

Coachee

Date

Date

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