

EXECUTIVE  
*Coaching*  
SUMMIT  
VII

Cutting Edge Practices for a Dramatically Changing Marketplace

Executive Coaching Summit VII

White Paper

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## **Part One: Introduction and Summary of Executive Coaching Summit**

### **Introduction**

The seventh annual Executive Coaching Summit VII (ECSVII) was held November 7-8, 2005 in San Jose, California. Eighty executive coaches representing North America, Asia, Central America and Australia participated in the annual event, building upon the momentum of previous Summits.

### **1. White Paper Purpose**

The purpose of this White Paper is to provide a consolidation of the key conversations, concepts and themes generated by the executive coaching community at the seventh annual Executive Coaching Summit. A unique element of the Executive Coaching Summits has been the historical utilization of several skilled “recorders” who meticulously follow the conversations of the senior executive coaches and capture the multiple conversations and comments throughout the two-day summit on their laptop computers. A feature of this white paper is the in-depth reporting of these comments – called “additional voices” (edited to enhance clarity of the spoken word) – allowing subsequent researchers to do additional analysis of the raw data of the Summit. These additional voices compliment the major themes presented in Part One’s Executive Summary. This paper is structured into the following segments:

### **Part One: Introduction and Summary of Executive Coaching Summit**

1. White Paper Purpose
2. Background on the Executive Coaching Summit
3. Executive Coaching Summit Vision, Mission, and Theme
4. Executive Summaries of the 2005 Executive Coaching Summit

### **Part Two: Additional Thoughts and Voices on Executive Coaching Summit Themes**

5. Additional Thoughts on: What Marketplace Changes do We See Related to the Executive Coaching Field?
6. Additional Thoughts on: What Impacts do These Changes Have on Executive Coaches?
7. Additional Thoughts on: Executive Coaches’ Proactive Strategies for a Changing Marketplace

### **Part Three: Agenda and Acknowledgements**

### **Appendix**

### **2. Background of the Executive Coaching Summit**

Since 1999, a select group of executive coaches have gathered for the Executive Coaching Summit - an annual think-tank of executive coaches who share their collective experience and insights in order to advance the profession. The theme of the Executive Coaching Summit VII was “Cutting Edge Practices for a Dramatically Changing Marketplace.” The summit is characterized by the unique make-up of the group, who are seasoned executive coaches. Participants were carefully screened for their extensive experience in the field. The Summit provided space to build a sense of community in a completely non-commercial environment.

Twelve Executive Coaching Summit Committee members met for eight months to design and plan the Summit. Over one-hundred executive coaches applied to attend the Summit and 80 were selected.

### **3. Executive Coaching Summit Vision, Mission and Theme**

**Vision of the 2005 Executive Coaching Summit:** We are a pioneering and leading-edge community of executive coaches that serves as a catalyst to transform leadership for a better world.

**Mission of the 2005 Executive Coaching Summit:** To hold a two-day event that provides an environment, experiences, and activities to:

- Model leadership by showing up authentically and sharing fully
- Facilitate the creation of state-of-the-art coaching
- Advance the field through cross-pollination of ideas and birthing of new initiatives.

**Theme of the 2005 Executive Coaching Summit:** Cutting Edge Practices for a Dramatically Changing Marketplace.

### **4. Executive Summaries of the 2005 Executive Coaching Summit**

The executive summaries have been created by carefully analyzing the extensive comments we recorded (which can be found in Part Two of this White Paper) and distilling those comments into specific themes. Ten themes on marketplace changes, six themes on implications for the coaching industry, and ten themes on how coaches are addressing the changing marketplace, are identified.

#### **Marketplace Changes**

Multiple factors, such as an increased demand for executive coaching, an increase in the number of executive coaching firms and demographic changes are creating an impact on the executive coaching industry. There are ten primary marketplace changes affecting executive coaching as identified by Summit participants.

The Ten Most Frequent Answers to “What Marketplace Changes Do We See Related to the Executive Coaching Field?” include the following (in no particular order):

1. Organizations increasingly buy coaching in the context of a specific business need.
2. An increasing number of organizations are attempting to build “coaching cultures,” which link personal development, leadership development, business outcomes and the coaching model of inquiry and peak performance.
3. Accelerating change has reached a feverish pitch, leading some organizations to decompensate.
4. Competition in the coaching industry has increased.
5. Buyers of coaching services look for background in technical skills, such as executive development, organizational development, team-building and other specialties.
6. Buyers/clients are becoming more sophisticated in examining their perceived value of executive coaching.
7. Buyers/clients are becoming more sophisticated in their decision-making process of selecting coaches, such as considering references, related experience and certification.
8. Globalization and demographic changes are creating additional conditions that benefit from coaching.
9. Global differences exist between how coaching is utilized and how the industry has developed in different countries.
10. The demand for coaching is increasing.

### **Implications for the Coaching Industry**

The ten marketplace changes identified above are creating multiple impacts on how executive coaching is conducted, marketed, contracted, and publicly viewed. Here are six of the most commonly identified impacts on the executive coaching industry:

Six Most Frequent Answers to the Question “What Are The Impacts of the Recent Market Changes on Executive Coaches?” include the following:

1. It is difficult to have continuity of coaching when rapid change is impeding coaching initiatives.
2. It is increasingly helpful for coaches to collaborate in forming coaching boutiques that are sophisticated enough to compete with large companies that offer coaching services.
3. Increasingly executive coaches are seeking certification or credentialing.
4. The use of executive coaching within organizations is accelerating, providing many opportunities for coaches who have developed the experience, presentation style and reputation that fits the needs of the buyer.
5. There is an increasing interest in the development of internal coaching programs for budget reasons, although concerns remain about how open employees may be with an internal coach.
6. Coaches need to possess expertise greater than only “coaching skills.”

### **How Coaches are Addressing Marketplace Changes**

Executive coaches have adapted to the marketplace changes affecting the executive coaching industry by adopting strategies that assist the individual executive coaches and the coaching industry. Here are 10 strategies identified by Executive Coaching Summit VII participants to proactively address the evolving executive coaching marketplace:

Most Frequent Top Ten Answers to “What Are We Creating To Deal With The Changes In The Marketplace?” include the following:

1. Networking and collaborating
2. Promoting an awareness of the role and benefits of coaching
3. Maintaining a results orientation
4. Utilizing a systems approach when appropriate
5. Investing in life-long learning
6. Identifying and creating resources or tools to aid clients and establish credibility
7. Engaging in activities to build the professionalism of the coaching field
8. Increasingly utilizing technology to support the coaching process and enhance services
9. Addressing generational gaps, needs of emerging leaders and demographic changes
10. Adapting to an increasingly global environment

## **Part Two: Additional Thoughts and Voices on Executive Coaching Summit Themes**

### **5. Additional Thoughts and Voices Addressing: What Marketplace Changes Do We See Related to the Executive Coaching Field?**

1. Organizations increasingly buy coaching in the context of a specific business need.
  - a. There is increased emphasis on purchasing coaching services in a particular business context as opposed to obtaining general development services.
  - b. Increasingly, both leadership development and executive coaching are being examined in terms of business outcomes.
  - c. Higher level executives prefer customized individual coaching services as opposed to a coaching “framework.”
  - d. Some organizations are purchasing a blend of coaching and consulting – attempting to purchase a “solution” as opposed to solely hiring a coach. The implication is that some coaches are seeing a need to package coaching services in a solution-oriented context as the buyers have increased choices.
  
2. Growth of the demand for “coaching cultures,” which link personal development, leadership development, business outcomes and the coaching model of inquiry and peak performance.
  - a. Some executive coaches report encountering a sense of humility from leaders when they can’t keep up with demands and have to find a different way of leading. This contributes to the demand for coaching.
  - b. Global organizations have increasing needs for executives with “global talent,” i.e. culturally aware, adaptable, and experienced in a global business environment.
  - c. Some leaders seem to see more of a connection between personal transformation and business outcomes, including recognizing the value of reflection in a results-oriented (people, profit and productivity) framework.
  - d. Individuals are aware that much rides on their personal integrity; this is an additional factor fueling the demand for executive coaches.
  - e. Some organizations have seen their strategic plans fail, and the leaders are trying to move so fast that they need an executive coach to help them notice their thinking errors.
  - f. The command and control leadership style does not work as effectively now in part because many younger employees resist it. Leadership must become more flexible and the work place must be made attractive in order to have adequate retention. To this end, coaching can help leaders develop flexible leadership styles.
  - g. More executives are talking about social responsibility – coaches are hearing more about integrity and purpose, and stakeholder versus stockholders.
  - h. Because there is less top-down leadership, and no single person is the sole “leader,” coaches are being asked to develop individuals at multiple levels in the organization.
  - i. In coaching conversations, some coaches observe leaders discuss less about strategy and more about topics such as purpose and company mission.
  - j. Coaches are often used in succession planning.

- k. In some organizations, it has become a status symbol to have a coach. Coaches have heard comments recently such as, “My boss came back from a conference and was worried. He said two-thirds of the people had a coach and he was wondering why he didn’t.”
  - l. Increasingly, coaching is seen as not just for remedial purposes, but as an executive perk.
  - m. Organizations are increasingly interested in developing coaching cultures to help executive change efforts. Some studies indicate that 85% of change efforts fail in organizations (UMich). The research states that although technical changes and team-building are conducted, people often don’t utilize new systems because they haven’t shifted mindsets. A coaching culture is seen as a way to help people shift mindsets and adapt to change.
  - n. Some organizations need large groups of coaches to satisfy their needs.
  - o. Increasingly, coaching objectives include other team members rather than just focusing on one individual.
  - p. More companies want to create a coaching culture, which is creating a need to develop ways and practices to drive coaching through an entire organization.
  - q. Increasingly, organizations see the value of a coaching approach, are cautious with their budgets, and are investing in teaching coaching skills to their managers.
  - r. Some organizations are seeking assistance from coaches in building either a “coaching culture” or an “internal coaching program.”
  - s. Sometimes coaching is now a “line” item in the organization as opposed to an appendage. Coaching is an integral part of what makes the organization sustainable and grow.
  - t. Some coaches are forging long-term internal/external partnerships to create a coaching culture.
3. Accelerating change has reached a feverish pitch, leading some organizations to decompensate.
    - a. Executive coaches now serve as one of the few trusted relationships in the workplace. Rapid changes and downsizing are creating a greater need for support.
    - b. Leaders and organizations are seeking coaching due to the increased complexities and demands put on managers and executives. There is a realization in organizations that the situation is not going to get easier so people need to adapt to the current rapid pace of change, and coaching is seen as a practical aid.
    - c. Many organizations have fragmented due to reorganizations, resulting in little continuity or shared history, which has created a need for assistance such as coaching.
    - d. Coaches have reported that when leadership changes as often as every two years it makes it difficult for sustaining an ongoing effective coaching initiative.
  4. The coaching industry has become more competitive.
    - a. In some organizations coaching is being treated as a commodity.
    - b. In the past, much coaching was arranged one-on-one through the Human Resources Department. A Summit attendee stated, “Now, in my organization, coaching is mostly part of the Organizational Development team. There is more standardization now regarding coaching with both the Human Resources

departments and the Organizational Development departments. There are pluses and minuses to this. We have to make sure that as processes become more standardized the required flexibility is still present. Sometimes there are misunderstandings as to what coaching is about. Furthermore, there may be requests for the coach to report in some manner on the coaching process – which creates complications.”

- c. Some companies are now purchasing coaching services through a procurement group or a vendor list. In some cases, they are making decisions primarily based on price instead of value. In some organizations this centralized purchasing is contributing to standardization of coaching, and in some cases less individual choice of coaches.
  - d. Some organizations have created their own “preferred coaching provider” panels.
  - e. Some organizations are using the RFP process to purchase coaching.
  - f. Some organizations are using a multiple interview process to select coaches for higher level executives.
  - g. Many companies want to use coaching and do not know how to proceed. For example, a person is told to get a coach but the individual doesn’t know where or how to find an appropriate coach.
  - h. Smaller coaching providers find it challenging to meet the requirements of organizations’ larger coaching initiatives, pushing the drive for individual coaches to form alliances.
  - i. Having a cadre of internal coaches is seen by some organizations as more cost effective than hiring external coaches but there is concern that employees may be less forthcoming with internal versus external coaches.
  - j. Some organizations have increased their use of internal coaches for mid-level employees while maintaining a separate network of external executive coaches for higher level executives.
  - k. Large consulting and accounting firms are developing their own executive coaching services to offer their customers.
  - l. Coaches are creating groups, affiliations and partnerships (to cover larger companies’ requirements). These groups may help the organization feel they have a simplified purchasing process and are hiring a high quality group of coaches with a supposed known set of competencies and a mission aligned with the organization.
  - m. Many coaches believe that the collaboration they have with other coaches, and the communities of coaches they join, will bring them more coaching business opportunities.
  - n. Some small coaching groups are broadening their expertise by partnering with other experts to meet client’s needs.
5. Buyers of coaching services look for background in technical skills, such as executive development, organizational development, team-building and other specialties – beyond only coaching skills.
    - a. Coaches maintain that even though they do not need to be experts in the client’s business, they still need to know enough about the business to be able to make a reasonable contribution to the conversation.

- b. A coach is more valuable to the consumer of coaching services if the coach is knowledgeable of other resources in terms of other trusted advisors who may become necessary.
6. Buyers/clients are becoming more sophisticated in examining their perceived value of executive coaching.
  - a. Increased credibility of the coaching profession is needed.
  - b. There is an increasing focus on proving the return of investment (ROI) of coaching, which is important, but it has been observed that some HR departments are over emphasizing attempting to measure ROI rather than focusing on enabling the best, most productive coaching engagement. Some coaches are finding it valuable to sell their coaching services to decision-makers at the top of the organization rather than becoming a lower-level HR function.
  - c. Large corporate settings have increased their use of internal coaches. Smaller organizations generally only utilize external coaches.
  - d. The executive coaching field needs more outcome research studies on coaching effectiveness since few currently exist.
  - e. More coaches are attempting to show the return on investment of their services.
7. Buyers/clients are becoming more sophisticated in their decision-making process of selecting coaches, such as considering references, related experience and certification.
  - a. Organizations are showing increased interest in standards for coaching in an attempt to identify ways to ensure quality delivery. Some organizations have consolidated their buying of coaching services to one provider organization with the thinking that this might lead to increased alignment in the coaching processes that the coaches use, and some organizations are assuming this will yield better results.
  - b. Some organizations believe that internal coaches will be more cost-effective than external coaches; but other organizations believe that external coaches may be more productive and provide more value, in part because employees are often assumed to be more willing to be open with an external coach.
  - c. Alternately, some organizational buyers of coaching want to use different coaches, who use different multiple models, to satisfy the myriad of coaching needs, and different personalities. Other organizations believe that if they utilize a single coaching model that that will bring advantages.
  - d. An increasing number of organizations are requiring coaching services to be provided by certified coaches, such as ICF credentialed coaches, as one gauge to attempt to select competent coaches – although the executive coaching community itself is not aligned behind a single credential.
8. Globalization and demographic changes are creating conditions that benefit from coaching.
  - a. The combined forces of globalization and the changing demographics are creating a workforce that responds to hierarchy differently than in the past.
  - b. Organizations are experiencing the demographic shift of baby-boomers exiting and retiring. Organizations are on the verge of an incredible loss of information and experience. As a result of this, organizations have a dearth of emerging

- leaders in their pipelines. These succession issues increase the demand for executive coaching.
- c. A new employee-employer contract is emerging as younger employees have a different concept of work than baby-boomers. Younger employees demand more work-life balance and are not willing to trade as much for the sake of the organization. Gen Y (20-somethings) are often described as comfortable with technology, own their own value as they are their own brand, have less loyalty to an organization, seek more frequent changes, and seek democracy in their work life.
  - d. Leaders are increasingly concerned about employee retention as they know employees will not stay if they are not satisfied.
  - e. A new generation of leaders will soon emerge. “Gen X” leaders are predicted to excel in teamwork and collaboration. To succeed in this environment, more executives are interested in emotional intelligence.
  - f. Organizations are finding that an increasing number of women are leaving corporate life while the organizations want them back.
9. Global differences exist between how coaching is utilized and how the industry has developed in different countries.
- a. The impact of disasters, such as the tsunami and hurricane Katrina, has created unprecedented conditions for the affected organizations. Some executive coaches are working in conditions where entire plants were destroyed, where teams are failing, where “numbers” cannot be met, and the coach is helping them hold open the space to move forward, help them recover and create systems to work around what is not working any longer.
  - b. Coaching is more organized in some countries than in others. For example, in Australia coaching is a more organized professional service by far than in El Salvador.
  - c. In some organizations, and countries, like Korea, it is a new, trendy thing to be able to say: “I have a coach.” It is like having a new luxury car. In these settings, having a coach is seen as a perk, almost like their “secret weapon” to be more successful, as opposed to using a coach to just reach expected level of performance.
10. The demand for coaching is increasing.
- a. There are “celebrity coaches” in the media who are building demand for coaching.
  - b. In some MBA programs, MBA students are able to work with a coach.
  - c. Although there is increased awareness about, or proliferation of, coaching, many people still do not understand what coaching is.
  - d. Coaches are used to improve employee retention.
  - e. Coaching is seen as a way to increase employee engagement. The Australian National Bank is mentioned as an example of how, when coaching helped increase engagement, the stock value correspondingly increased.
  - f. Smaller companies are increasingly hiring coaches.

## **6. Additional Thoughts and Voices Addressing: What Are the Impacts of the Recent Market Changes on Executive Coaches?**

1. The buyers of coaching services are CEO's, COO's, management, human resources, intermediaries, coaching networks and business owners. Often the purchaser of coaching is the leader of a business line that is interested in doing something big with their business and they want to utilize coaching to help them get their business result.
2. Some coaches believe they need to be increasing their skills to be more globally competent (i.e. speaking additional languages).
3. Increasingly executive coaches are seeking certification or credentialing.
4. The globalization and consolidation issues are mostly relevant to the large organizational buyer of coaching and the coaches who service that group.
5. In a very large organization like IBM, with over 300,000 employees, it is huge challenge to create a coaching initiative that can have a big enough impact. Now IBM has a Director of Coaching to get folks engaged throughout the organization.
6. Individual coaches are finding collaboration is increasingly important. Individual coaches are now organizing into boutiques to attempt to be cohesive enough and market well enough to compete with large consulting companies that are adding coaching to their service lines.
7. Some small coaching groups are broadening their expertise by partnering with other experts to meet client's needs.
8. More coaches are attempting to show the return on investment of their services.
9. Coaching is becoming even more relevant and needed as more organizations create a flatter structure.
10. Coaches and their clients must deal with the reality of influencing without authority, i.e. dotted lines, not just straight lines. In general, the coach and client must be flexible and creative.
11. Coaches maintain that although they do not need to be experts in the client's business, coaches still know enough about the business to be able to make a reasonable contribution to the conversation.
12. It is perceived as valuable to the consumer of coaching services if the coach is perceived as knowledgeable of other resources – like additional trusted advisors that may become necessary.
13. Some clients want a coach who can ask powerful questions to enable the client to look deeper within them and tap into who they are, or can be, as leaders.
14. Clients want coaches to give them practical tools.
15. Coaches are increasingly contracted to groom the future leaders of the organization.
16. Coaches are forging long-term internal/external partnerships to create a coaching culture.

## **7. Additional Thoughts and Voices Addressing: Executive Coaches' Proactive Strategies for a Changing Marketplace**

### **Ten Themes**

Summary of the Top Answers to “What Are We Creating To Deal With The Changes In The Marketplace?” include the following:

1. Networking and collaborating
2. Promoting an awareness of the role and benefits of coaching
3. Maintaining a results orientation
4. When appropriate, utilizing a systems approach
5. Investing in, and supporting, life-long learning
6. Identifying and creating resources or tools to aid clients and establish credibility
7. Engaging in activities to build the professionalism of the coaching field
8. Addressing generational gaps, needs of emerging leaders, and demographic changes
9. Increasingly utilizing technology to support the coaching process and enhance services
10. Adapting to an increasingly global environment

#### **1. Networking and collaborating**

- Executive coaches are becoming “masters of collaboration” – we are forming alliances with each other and building networks of colleagues so that we can refer work to one another and call on each other for help with specific projects.
- We are learning to leverage each other’s strengths as colleagues and collaborators. Bringing in fellow coaches or consultants on projects, with specific expertise, enhances our credibility and builds our own breadth and scope for client engagements.
- Creating “mastermind” groups locally or via telephone is a powerful way to gain support from and collaborate with each other; discussing problem areas, specific cases, coaching techniques and other lessons from the field can be highly valuable and can help us build community and feel less “siloeed” in our professional lives.
- Building webs of opportunity within our client companies is a very strategic way to generate business. Coaches can become fully entrenched in an organization and sought after from within. We become an embedded resource and a hybrid of an internal/external coach that is very valuable to the company.
- Tapping into our current networks more fully is another way to respond to the changing marketplace, for instance staying active with an MBA alumni program or marketing ourselves through known sources that trust in our credibility.

#### **2. Promoting an awareness of the role and benefits of coaching**

- We are working to bring “soft skills” even further into the mainstream, opening up the notion of communication and supporting leadership development in a way that typical business practices do not.
- Coaches are providing more clarification around what we do from the client perspective; we are building our sales and business development capabilities.
- We are able to take a holistic view of an organization and its particular developmental needs and then educate our clients about how coaching fits into the larger picture.

- We are positioning coaching as a true asset for clients and their employees, eliminating the stigma that coaching is remedial and marketing it as a “secret weapon” to maintain a competitive edge.
- Entering the coaching engagement through an executive as opposed to through the Human Resources department sometimes proves an effective strategy for convincing organizations of the need for coaching.
- Providing complimentary coaching to staff members off-the-clock can generate awareness of the power of coaching and can give coaches access to huge influencers in the organization. The client’s perception of added value that the company is not paying for will further endear the coach to the potential client.
- We highlight the desirability for coaching in an organization creating coaching packages that sell. Then by delivering value from coaching, once we are in the door, we create a system that will support additional coaching when needed.

### **3. Maintaining a results orientation**

- Executive coaches are partnering with their clients to truly unearth client needs and collaboratively design a way to assess how well those needs have been addressed at the end of the project. This also ensures that the client gets a customized program based on their set of objectives rather than a set protocol/coaching program.
- Coaches are adept at solving real, tangible business problems such as the need for leadership development or increased organizational effectiveness.
- Coaches and clients benefit from contracting upfront with their clients on assessing results using pre- and -post measures, thereby creating for clients the ability to objectively track a better reality through bottom line results. It is also desirable to design into our projects a method for constituents’ voices to be heard so the organization can monitor business.
- As executive coaches, we are able to evaluate and develop tools to understand what to recommend what type of intervention would be most helpful -- such as when training would be best -- versus coaching.
- Many coach-client engagements begin with what the client is trying to accomplish, i.e. their business or organizational objectives, and what the goals of their project are. Once this is accomplished, the method to achieve the goals becomes clear. Sometimes coaches attempt to “sell” coaching as the solution prematurely.

### **4. When appropriate, utilizing a systems approach**

- Help clients reconnect with their primary goals and values, and then create a customized process fully aligned with those values that begins with research and evaluation and extends through the full cycle.
- Based on client needs, offer an extended portfolio of services (e.g. training, customized coaching packages, career management workshops, leadership transitions, secession planning) and different levels of service (e.g. high-level vs. low-level, shorter contracts).
- To address developmental needs around succession and bench strength from below; develop an entire curriculum of courses and coaching approaches to turn managers into leaders.

- Propose a more holistic approach that helps the company become a true learning organization by creating a context and culture for coaching and then offering packages as well as systems that allow us to deliver excellent coaching services.
- We mirror what is happening in the business environment by being able to provide tangible value through seamless, multi-dimensional offerings.
- We examine industry trends and identify opportunities for cultural transition and alignment, as this gives us an easier entrée into the organization and allows us to offer a more integrative product, e.g. mergers and acquisition OD specialist, cross-cultural capacities w/ overseas partners.
- Coaches examine the business cycle of a company and are able to align what we do and where we fit in; e.g. responding rather than selling, making offers based on the company life cycle.
- In our approaches, we provide insight into the broader corporate culture and attempt to cover multiple domains with the client, integrating both individual and collective values and expressions as leader and organization.
- How can we make our coaching approaches sustainable across the entire organization? We address the tension between pieces and the overall system and are able to support multiple components over time.

## **5. Investing in, and supporting, life-long learning**

- Executive Coaches are gradually increasing their publication and research activities.
- Contributing to a body of research knowledge will further the credibility of the field and demonstrate the value and impact that coaching can have on an organization.
- Designing research engagements with client firms can be highly effective and informative, with a benefit to both the coach and the organization.
- Teaching classes as a useful method of creating and disseminating knowledge.
- Completing courses in executive coaching and related fields.
- Becoming “certified” or “credentialed” in coaching.
- Reading books and articles and keeping up with current trends is essential; noticing what is on our clients’ bookshelves as well as staying abreast of the latest publications in the field of executive coaching is a must.
- Building our knowledge of business competencies, technical skills, and change management techniques as well as other organizational development models will serve us well in our client projects. Keeping these techniques and tools fresh and at our fingertips will enhance our ability to help clients where they need it most.
- Continuing to develop leadership skills for ourselves is a critical step for us to be able to model within ourselves what we help our clients do.
- Educating ourselves around specific domains of expertise, such as corporate governance, will build our knowledge base on an individual and a collective level and can help us define our specific niches.

## **6. Identifying and creating resources or tools to aid clients and establish credibility**

- Adding value wherever you can with your clients, such as creating a CD of information and handouts on areas such as delegation, leadership, emotional intelligence, negotiation skills and other skill and competency areas.
- Using tools such as online survey instruments can create a valuable resource for clients both within projects and to assess results. For example, you can use an online survey to assess employee satisfaction or to have the client evaluate the coaching after the engagement.
- Bringing clients books and articles on leadership best practices or on specific issues they are struggling with on an individual or organizational level is usually appreciated.

## **7. Engaging in activities to build the professionalism of the coaching field**

- We are learning to develop ourselves as trusted advisers – having high integrity, bringing value and being in tune with our client’s agenda. Clients will seek us out because of our credibility but will stay in the process because of the trusted transaction.
- Living the ethical guidelines of a coach in our own lives—modeling these ethics—is a critical part of our own professional development.
- We are continuing to develop ourselves as leaders.
- We are continuing to create a space for our clients to deeply reflect, using self-as-instrument techniques and never compromising on authenticity and integrity.
- Coaching may become like a commodity -- that is desired throughout the world, and maybe purchased at the lowest cost. How can we make coaching available and accessible without compromising the quality?
- Coaching professional organizations are increasingly requiring training and certification in order to be a full member of the organization.
- Coaches are becoming more qualified, and in many cases, certified. We are holding ourselves to the highest standard in terms of credentials and training. Increasingly, coaches are investing in training and seeking coach-specific credentials.
- We are deliberate in demarcating between organizational consulting and coaching, dealing with the “blurriness” of our profession and how coaching fits into the organizational system.
- Some professionals are conceiving of the coach in a role analogous to that of a general practitioner or “GP,” wherein the coach is the GP in the spectrum of organizational change initiatives. In this sense, we can create an identity of effectiveness rather than a mentality of “I am a coach and I don’t do that.” Coaches are wearing a variety of hats that support the journey of discovery for the client and the organization, and then tapping the appropriate skill out of a smorgasbord of skills.
- We are continuing to support using coaching as a strategic tool. What is the organization trying to accomplish? What does the individual want? How is this organization using coaching to improve their success? All of these organizational questions need to be aligned within the coaching approach.

## **8. Addressing generational gaps, needs of emerging leaders and demographic changes**

- The younger generation is longing for mentoring, coaching and advising. The finesse required now is for the more senior folks to know when to coach and when to bring in their expertise and personal experience. Coaches can help their clients establish effective rules of thumb. If mentoring programs are not living up to their promise and people are not growing or getting promotions, coaches may be able to help reverse this trend.
- In academia, the trend is that tenured professors are coming of age to retire, and this trend is being echoed in many other fields. Building coaching programs around transitions and helping the old guard establish their legacy and move on is a lucrative potential niche.
- Building a business around succession planning can be very effective, as companies are finding that they need this type of intervention and that there is a major gap between the junior and senior executives in an organization.
- Put together an action-learning program to get the senior people to facilitate the learning of the junior people. Coaches handle the soft skills, and the senior people handle the business impact, with the end result of improving overall soft skills and transferring the organizational story and wisdom.

## **9. Increasingly utilizing technology to support the coaching process and enhance services**

- Using high tech solutions is a highly effective way to complement the coaching process. For example, designing collaborative discussion sites through online services, using an intranet for implementation, accountabilities, monthly milestones, and tracking, or using an online survey tool for data collection or to evaluate impact of coaching skills on managers are all great ways to create value and monitor results.
- Developing your website and pointing clients to the website is a powerful way to make technology work for you. Putting tools online, such as assessments and making it interactive, will help your search engine rating and give you greater exposure to other potential clients.

## **10. Adapting to an increasingly global environment**

- Creating global teams and partners is an essential survival strategy in today's global marketplace. Executive coaches who are experts in particular cultures, who have "feet on the street," can train others when they work within these cultures.
- Understanding how a particular culture deals with stereotypes can inform our coaching practices when we serve clients in these cultures.
- Making connections with clients in another country and creating familiarity despite geographical distance is a must. One coach says, "My picture is on my card so that people feel that they've met me even though they might not see me. It helps me to make connections with clients I may speak with on the phone and be represented by the person I have in that country."
- While using technology is important to globalization, one cannot be a global leader in the coaching field unless one develops an enhanced level of multi-cultural awareness by traveling to the country where the client resides.

- Urging companies to close the cultural gaps between their offices is a good strategy by which to sell coaching, and being well versed in the cultural differences and able to help close this divide is a highly marketable skill.
- As global executive coaches, we need to understand global economics and trade agreements and how they influence our own business and the businesses of our clients.

## Part Three: Agenda and Acknowledgements

### *2005 Executive Coaching Summit Agenda*

#### **Day 1: November 7, 2005**

##### **Morning**

- 7:30 am *Check-in, Continental breakfast and Networking*
- 8:30 *Welcome and Opening Session*
- 9:00 *Thinking With Our Hands Part 1: Connecting with each other and to our Vision and Mission using Legos Serious Play methodology.*
- 10:15 *Break*
- 10:30 *Thinking With Our Hands Part 2*
- 11:15 *The Changing Reality of the Marketplace: A discussion of changes and trends in the Executive coaching marketplace*
- 12:15 pm ***LUNCH** and Networking*
- ##### **Afternoon**
- 1:15 pm *Energizer Activity*
- 1:20 *Emerging Marketplace Opportunities: What are we innovating to deal with the changes in the market?*
- 2:45 *Break*
- 3:00 *Developing Ourselves as Coaches-Cutting Edge Practices: How have you grown over the past year? What's next for your development?*
- 4:00 *Energizer Activity*
- 4:15 *Mini-Mastermind Groups Part 1: Forming triads for coaching on your top priority challenges*
- 4:35 *Day 1 Debrief: What did you find valuable today?*
- 5:00 (optional) *Summit Networking Hour: A social setting for connecting, exchanging learnings, and talking about our research, products and services. Tables to display materials. Co-sponsored by ICCO.*
- DINNER** *On your own. Another networking opportunity.*

**Day 2: November 8, 2005**

**Morning**

- 7:30 am *Continental Breakfast and Networking*
- 8:30 *Kick-off Session*
- 9:00 *Mini-Mastermind Groups Part 2: Deepening connection with other coaches. Live coaching of each other in triads: for real-life solutions*
- 10:00 *Play It Forward: The top ideas for accelerating our personal and professional development. Based on Mastermind experience: how can this be a springboard for your future learning?*
- 10:30 *Break*
- 10:45 *Pioneering the Future: Specifics on how each of us is pioneering the future with our clients and in our profession*
- 12:00 pm ***LUNCH** and networking*

**Afternoon**

- 1:00 pm *Energizer Activity*
- 1:15 *Stories from the Edge: Sharing our most compelling narratives of taking risks in our coaching. Personal stories of flops and best practices*
- 3:15 *Break*
- 3:30 *Declaring the Future: Taking a stand for our clients and our profession as pioneers in executive coaching. What will you do now?*
- 4:15 *Closing Session*
- 5:00 *Summit Adjourns*

## Acknowledgements

This year's Summit has been the result of many people working together on countless activities, large and small. We wish to acknowledge several of them by name:

- Marc Mallow, Mallow Associates, for the new Executive Summit website: [www.mallowandassociates.com](http://www.mallowandassociates.com)
- Nancy Hauer, Hauer Design, Seattle, WA, for the new Summit logo: [www.hauerdesign.net](http://www.hauerdesign.net)
- Alberto Beuses, for revisions to the Summit logo.
- Cambria Consulting for office space and food/drink for the Summit planning meeting.
- Jody Lenz, for the Thinking With Your Hands Workshop

The Recorders for capturing the intellectual capital from the Summit:

- Emily Neustadt
- Caty Everett
- Jill Davis
- Ricki Bander

Room Managers for their tireless assistance and creating an environment that fosters learning, collaboration and contribution:

- Chuck Berke
- Ruth Weniger

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The International Coach Federation for their generous provision of the meeting facilities and assistance: [www.coachfederation.org](http://www.coachfederation.org).

ICCO for their generous contribution to help us gather at the cocktail networking hour: [www.coachingconsortium.org](http://www.coachingconsortium.org).

Sue Kramer, Peace of Mind Virtual Assistance, for her assistance with the preparation of the Participants' Notebook and the Power Point presentation: [www.VAPeachofMind.com](http://www.VAPeachofMind.com).

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## Appendix

### Welcome Letter to Executive Coaching Summit VII Participants

**San Jose, California November 7-8, 2005**

Dear Colleague,

We warmly welcome you to participate in the seventh annual International Executive Coaching Summit (ECSVII) -- THE annual think-tank gathering of top executive coaches worldwide. You are part of an outstanding group of top tier coaches from around the world who share the commitments: to learn, to contribute, to network with mastery level colleagues and to advance the executive coaching profession.

The theme of this year's Summit is:

**“Cutting Edge Practices for a Dramatically Changing Marketplace.”**

With you, we intend to create an experience that allows us to explore our most significant questions, and deepen our connection with each other as masterful colleagues. This year we specifically designed several facilitated experiences that use the most powerful resource in the room: you! So this year there will not be much formal presentation from the podium at the front of the room. This year's Summit design is based on the recognition that the people in this room are the experts. We heard your feedback last year: that what we really value is getting to know our colleagues, thinking more deeply about issues we care about and creating solutions together.

I would like to express my gratitude to the Summit Planning Team for their time and energy. I also commend the Planning Team for actively demonstrating our vision through the way the team worked together: authentic, contributing, and committed to creating excellence.

Our team includes:

Don Arnoudse  
Jeff Auerbach  
Marilena Beuses  
John Boisvert  
Mark Cappellino  
Lisa Kleitz  
Ellen Kumata  
Suzanne Levy  
Russ Long  
John Mitchell  
Val Williams  
Joan Wright

We are excited to come together again and hope that you too will find this to be both an outstanding event and a truly valuable professional experience.

Thank you for showing up fully! Let's get it started!

**John Boisvert**  
**ECS VII Committee Chairperson**

**Table of Executive Coaching Summits:**

<b>Event and Date</b>	<b>Location</b>	<b>Theme</b>
ECS I: October 1999	Orlando, FL, USA	Defining and distinguishing executive coaching
ECS II: October 2000	Vancouver, BC, Canada	Business best practices, the future of executive coaching
ECS III: August 2001	Chicago, IL, USA	Community building; shared learning through case study, explored greater alignment with ICF
ECS IV: October 2002	Atlanta, GA, USA	Necessary Dialogue: Dilemmas in the Field and Client Perspectives
ECS V: October 2003	Denver, CO USA	Discovering new ways to serve: Leveraging Best Practices
ECS VI: November 2004	Quebec City, Quebec, Canada	Forging new pathways: A dialogue between leaders and executive coaches
ECS VII: November 2005	San Jose, CA USA	Cutting Edge Practices for a Dramatically Changing Marketplace

**Table of 2005 Executive Coaching Summit Participants:**

<i>Last Name</i>	<i>First Name</i>
Abbott	Geoffrey
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Betof	Nila
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Bhatt	Al
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Cappellino	Mark
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Fowler	Donna
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Hilton	Leslie
Hurley	Annette
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Jenks	Ginger
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Johnson	Bob
Josephs	Stephen
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Kimbell	Meredith
Kleitz	Lisa
Kovacs	Sandor
Kumata	Ellen
Lazar	John
Leduc	Sylva

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Lipsey	Sandra
Lishansky	Steve
Long	Russ
Malnekoff	Diane
Marcus	Merry
McDougall	Christine
McGrath	Jackie
Mercker	Kathleen
Merrill	Rebecca
Miller	Linda
Mitchell	John
Mitsch	Sandy
Moritz	Meryl
Mura	Agnes
Oberli	Stephan
O'Brien	Ginny
O'Neill	Mary
Pomerantz	Suzi
Robinson-Sage	Jeremy
Hayward	Wendy
Sandstrom	Jeannine
Sanson	Michael
Sloan	Karlin
Stevens	Tracy
Spritz Myers	Susan
Utts	David
Wagner	Angela
Walsh	Pete
Ward	Jeffrey
White	Pat
Williams	Val
Wright	Beverley
Wright	Joan
Wright	Karen
Yort	Linda
Zepuntke	Klaus