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THE EXECUTIVE COACHING PLAYBOOK

How to Launch, Run, and Grow Your Business

NADINE GREINER, PHD & BECKY DAVIS, MA

FOREWORD BY MARSHALL GOLDSMITH

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To all executive coaches who are
determined to shape the actions of leaders.

“Hope doesn’t come from words.
Hope only comes from actions.”
—Greta Thunberg

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Foreword

For more than four decades, I have had the privilege of working with leaders across every industry and geography, helping them become the best versions of themselves. It has been a rewarding and humbling experience to see the power and impact of coaching first-hand. But as any experienced executive coach will tell you, building a robust repertoire of insights, tools, and interventions takes time and effort.

That's why I am thrilled to endorse *The Executive Coaching Playbook*, a book that presents a proven methodology, grounded in psychological theory and research. Whether you're a beginner or a seasoned coach, this book provides a wealth of insights, tools, and templates to help you upskill your coaching practice and meet the diverse and complex challenges executives face.

Dr. Nadine's four-step executive coaching process is a proven model that any coach can use to build or refine their practice. The real-life examples and templates curated from a long career in coaching will help you build or scale your coaching practice. With more than 75 templates to use in client-facing communication, coaching interventions, client practices, and building and managing your business, this book will arm you with the tools you need to make a real difference. The focus on relationship skills throughout the book highlights the crucial importance of building, maintaining, and cultivating relationships with your clients. This is the key to building a lasting coaching practice and what defines truly great coaches!

In many ways, *The Executive Coaching Playbook* is the resource the industry has been needing. It will become your best guide and reference, and applying the insights and methods from this book will help set you apart in a very competitive environment.

I highly recommend this book to anyone looking to enhance their coaching practice and make a meaningful impact in their clients' lives. It is my great pleasure to welcome you to the tremendous world of executive coaching, and I urge you to keep reading and start applying the four-step model today!

—Marshall Goldsmith, Thinkers50 #1 Executive Coach
New York Times bestselling author, *The Earned Life*, *Triggers*, and *What Got You Here Won't Get You There*

Preface

As a follow-up to my 2018 book, *The Art of Executive Coaching*, I'm back to offer you a powerful companion: *The Executive Coaching Playbook.* It's the only book that offers a proven four-step coaching model tied to more than 75 immediately usable templates for your coaching business, along with a process for building your business, key considerations for you as an entrepreneur, and methods for taking care of yourself along the way. Real client stories throughout bring to life the model and templates. The methods and aids are together a turnkey resource inspired by my 30 years of experience as an executive coach and a C-level entrepreneur. Consider this your "coaching in a box" companion proven to accelerate and deepen your coaching clients' successes.

The Art of Executive Coaching was a story-format case-study piece designed to put you in the shoes of an experienced executive coach—bringing to life coaching conversations, pain points, and victories—to give you a sense of the creativity and finesse required to successfully transform an executive. Now in the playbook, I give you what you need to bring your practice of coaching to life. You don't need to read the first book for this one to benefit you, but I stand behind the idea that executive coaching is *both* an art and a science. So if you would like to see executive coaching come to life, then *The Art of Executive Coaching* is well worth the read.

Many coaching books offer helpful insights about the *what* and *why* of executive coaching, and so this book chooses not to focus solely on coaching theory—although it does contain a solid and unique theoretical backdrop. Instead, the playbook helps you sort out the *how* with sensible advice and a blueprint for results to help you achieve success with your dream clients. I have mentored and developed aspiring new coaches with these best practices, enabling them to move with confidence into the executive coaching world. In fact, each of those mentees went on to experience success in their first year of business. That is why I wanted to write this book: to package these best practices for those looking to enter coaching and entrepreneurship.

If you're a newly minted executive coach or if you have begun a coaching practice that doesn't seem to be gaining much momentum, then this book is for you. If you have a drive for continuous learning and seek ways to become a better coach, this book is for you. If you happen to be coaching executives internal to your organization, the model and coaching processes will give you a proven method for engaging with senior leaders and supporting their individual development.

For this book, I also introduce a writing partner, Becky Davis, who did a spectacular job helping me distill what felt like mountains of experience and resources into something navigable and helpful. She sprinkles in examples and wisdom from her own coaching experience throughout, giving you an even broader perspective.

I am thrilled you are saying *yes* to your dreams of being an executive coach, and it's my deepest desire that this book become an essential companion to your journey.

—Nadine Greiner

Introduction

Coaching is deeply personal and deeply rewarding. It's an opportunity to develop a dedicated relationship with your client, helping them unlock their potential while working through the day-to-day joys, challenges, and impacts of leading in the 21st century. It's rewarding, creative, and dynamic work to support another leader in achieving their goals, deepening their strengths, and addressing obstacles that may be holding them back from advancing or reaching their professional aspirations. Coaching helps the leader change in the ways they want to change, and sometimes change in the ways essential for their effectiveness as an executive. It helps guide clients and deepen their capacity to take in feedback from various sources to build an individual development plan. Welcome to the playbook, where I present a faster, deeper, better way of coaching your clients and running your business.

To illustrate, I'll share the story of Eric, a client with whom I developed a dynamic coaching relationship that led to his rewarding transformation. Eric sought out coaching because he was not getting promoted, despite strong performance. He heard about me through word of mouth and engaged me as his executive coach, which speaks to what can happen when you manage your business with as much focus and enthusiasm as you use to conduct your coaching services. It all comes down to the power of relationships.

Eric made a lateral job move to a large healthcare provider after many years at another "big brand" healthcare provider. Part of this move was motivated by his belief that he could grow to the next level. He was eager to prove himself and earn his VP stripes. He did all the right things: performed at a high level, managed his team to deliver, and joined a leadership academy program to grow the desired VP leadership skills. Still, no promotion.

I worked with Eric on three key competencies: authenticity, managing up and out, and ambition. I learned in the assessment interview that people had a hard time getting to know Eric. He seemed aloof and not very personable. I worked with him on being more open and authentic at work. This involved simple things like bringing a couple of photos into his office to help people find common ground on a personal level. And he did deeper work around learning to connect with others and be vulnerable to share more of himself.

COMPETENCIES

Throughout the book, we'll highlight the language of competencies by naming those that our clients have worked on. Competencies are the currency of coaching, and by keeping this context front of mind, you're on your way to thinking like a successful executive coach. The coaching model you will learn about in this book is grounded in competency development, which I'll cover in detail later.

Regarding managing up and out: Although Eric had many opportunities to be in front of the executive team and board, he still wasn't perceived as VP material. I worked with him on his executive presence and focused on these presentation moments as a time to show his executive gravitas. This included a small change that had a big impact: When presenting business metrics, instead of jumping into the details, Eric gave a high-level message relevant to the audience (such as "all good news this quarter") and a few bullet points to support the message. Think of it as an executive summary in presentation mode, which helped elevate others' perception of him.

Lastly, we worked on ambition. You may be surprised to see ambition as a competency for Eric to develop, given his clear goal of upward mobility. However, Eric had not told anyone—including his boss—of his goal. I worked with Eric to develop a conversation plan to communicate his interests with his boss and identify areas to focus on to get him VP-ready before the next promotion cycle. Eric finally enlisted his boss's support. And guess what—he got promoted!

Eric is just one of the dozens of executives I've invested in over my career who have brought deep satisfaction to my work. Becky and I offer many client stories throughout the book to bring concepts to life, as a peek behind the curtain of this unique relationship called executive coaching. To preserve confidentiality, we have changed the names of our clients and their businesses and industries.

The Whys

Every great coach strives to make a positive difference in and with their clients. This is your big why (we'll get into that later)—the reason you got into this profession. Whereas you're here to make a positive difference, your client seeks support for an opportunity or a goal. You can help them!

There are several reasons someone is sponsored into coaching:

- They want to prepare for the next promotion faster.
- An undeveloped key leadership expectation is holding them back.

- They are being “sent” to coaching to fix a troubling behavior or set of behaviors, sometimes with a tone of “last-ditch effort.”

In addition, they may seek ongoing development and a trusted confidant. As they say, it’s lonely at the top, and executives need a skilled partner to guide them as they express frustrations, experiment and fail, and learn and grow their executive competencies. That is the field and privilege of coaching.

Other reasons a client may seek coaching include:

- Identify a career or job that fits.
- Accelerate a career path.
- Find immediate success in a new job.
- Build relationships with colleagues.
- Enhance their reputation.
- Improve their ability to lead change in a fast-paced environment.
- Find more balance with the demands of work and life.

These are just a few examples of why clients seek support from you, and over your career you’ll uncover many more. You have the privilege to enable, guide, and witness these life-changing moments. This affords you the fulfilling and joyful feeling of helping another person achieve something meaningful. You get the satisfaction of seeing real, significant change that lasts. That is what my way of coaching is all about.

As coaches, we are brokers of hope to entice a leader to see their opportunities for growth; recognize that despite their tremendous success, there is more to do; and ultimately help them become even more effective in their executive roles and careers. This work can have a spillover effect in clients’ lives, which is also incredibly rewarding; for example, to help a partnership get back on track or to mend a wounded friendship.

The Landscape

The good news for you is that executive coaching is a booming business and can have significant financial rewards. Once a service kept mostly secret and offered to only an elite few at a company, executive coaching is now an investment offered to a much wider band of leaders and future leaders.

The coaching industry is one of the fastest-growing sectors in the world. The estimated global total revenue from coaching in 2019 was $2.849 billion, a 21 percent increase over the 2015 estimate (ICF 2020). It just keeps growing, which might explain why you picked up this book!

Coaching is growing in popularity because it works. According to the Institute for Professional Excellence in Coaching (iPEC), 99 percent of those coached were “satisfied or very satisfied,” and 96 percent said that “they’d repeat the process” (Hudson 2016). A third of all Fortune 500 companies include executive coaching in their standard leadership development for their elite executives and talented up-and-comers (iPEC Coaching n.d.), and that figure is growing. Using the coaching model and business practices in this book will help you become more skillful in your work and stand out with professional skills and proven concepts, contributing meaningfully to that growing market.

What Is Executive Coaching?

I get this question all the time, especially from clients and coaches who are new to coaching and want to understand what to expect from a coaching program. Coaching offers a formal, tailored method of working with a client in a series of one-on-one meetings. The meetings are designed to establish and achieve defined competencies in a few areas relevant to the client’s leadership position, level, and scope of work. The client builds competency through focused skill development and personalized development plans. Coaching is focused on the present—what the leader in front of you needs to become even more effective *now*. Executive coaching is an exciting, fulfilling, intimate, and transformative journey like no other.

For this book, an executive is anyone in a leadership capacity or with administrative authority in their company. It’s up to you to further refine the type of client you’re interested in working with. For example, you could focus on established C-suite leaders, vice president and director-level leaders, or leaders looking to make a professional change. That’s just three client examples in this broad category of “executive,” and in chapter 7, we’ll consider more ways for you to specialize as you home in on your ideal client.

Ultimately, the core belief of coaching is that individuals are capable of change. It’s grounded in the idea that while an individual may have the answers to their own problems and challenges, they need support finding or learning those answers in a more efficient way. Additionally, the client may need support in identifying and taking steps to improve themselves or their situation.

CLIENT SPOTLIGHT

Basking in Another's Success

The joy of coaching can continue beyond the coaching engagement. Recently, I was in the waiting room of a local medical office. I was awash in pride and happiness to see a former coaching client prominently featured on the company's mission poster, having earned another promotion since I had last seen her. I took a moment to reflect on Maria and how we worked to increase her already substantial leadership capability to position her for advancement. And look, she'd been promoted to the top job and was literally the poster child for the company's mission and values. I sat with the success of this individual and felt deep gratitude for the small part I got to play in helping her succeed. Moments like that remind me of why I became a coach: to help others achieve their dreams.

> Competencies
> Executive presence, strategic agility, communication skills

Sometimes the client does not have the answers. But as a coach, you have or can find the answers, because you have been an executive yourself and have both a deep understanding of human motivation and a clear, transparent method.

CLIENT SPOTLIGHT

Managing the Moment

Becky worked with Susan, an HR leader of a large manufacturing company. Susan was struggling with the demands of the work and her deeply rooted work ethic, which made it difficult for her to prioritize or say no when new requests came rolling in. Susan just worked harder, drove her team harder, and wound up feeling burned out. The coaching program helped Susan learn where her pattern of herculean effort stemmed from, which helped her manage this old pattern differently. She also learned that she was the keeper of the pressure valve and could modulate it as needed when other priorities were piling up. Lastly, Susan needed to learn how to have honest, direct conversations with her leader about how to prioritize in a dynamic environment. These conversations helped her build trust with her leader and allowed her to better manage the demands of her job. Susan's story shows how coaching influences a client's present to have real and immediately realized effects.

> Competencies
> Prioritization, crucial conversations, balance

Other Forms of Support That Aren't Coaching

It's important to differentiate among the many support modalities leaders and managers have at their disposal to clarify where you fit into the mix as a coach. Clients sometimes explore mentoring and counseling early in a coaching engagement as they seek to understand the differences and what to expect (Table I-1; Clutterbuck and Schneider 1998). Let's review some of the similarities and differences between coaching, mentoring, and counseling, which offer useful collaboration and insight as you work with your executives.

Table I-1. Different Learning Methods

	Coaching	Mentoring	Counseling
Question	How?	What?	Why?
Focus	Present	Future	Past
Aim	Improve skills	Develop learning goals	Overcome psychological barriers
Objective	Raise competence	Open horizons	Build self-understanding and heal past wounds

There are other means that might support a leader in their career journey. Many of these partnerships are quite specific, so they're touched on here lightly to offer some differentiation from coaching and ideas for where your client may benefit from another support structure.

Mentoring

Mentoring is like coaching in that it's an agreement between two people to help someone learn or develop on an accelerated path. A mentoring relationship usually focuses on the future, career development, and broadening an individual's horizons. Mentors can be assigned or chosen by the individual. Many workplace mentorship programs are aimed at building business acumen and expanding an individual's network within the company.

Counseling

Counseling is a powerful therapeutic intervention and can be a productive counterpart to coaching. It's done with a credentialed physician or therapist. Counseling often focuses on the past, helping the individual overcome barriers and issues rooted in their family, upbringing, and personal history. Coaching can sometimes do the same—for example, by helping a client unlearn the negative impact of a manager—but it does not explore the same depths with the same purpose.

Sponsor or Advocate

Sponsorship is essential in career progression. A sponsor can be thought of as someone who will speak on the client's behalf, especially when they're out of the room. They're the door openers who network for the client. They believe in the client and their potential. They're willing to spend some of their political capital and reputational currency to advocate for them. This might mean speaking on the client's behalf when new programs are discussed: "Monique would be a terrific program manager. In my experience, she is highly organized, able to build a high-performing team, and knows how to execute a complex project on time, on budget, and above expectations." That is a pretty terrific sponsor.

Advisor

An advisor is someone the client may call upon for specific input or guidance. This could range from business advice to troubleshooting a particularly difficult organizational situation. An advisor tends to be someone who has a strong relationship with the client, but the relationship is more transactional in nature, focused on problem solving.

For example, the client may be new to a business area and need to learn a novel technology. It's wise for this client to seek out the technical experts in the business group to learn quickly about the product and what is on the horizon from a development perspective. There will likely be a few meetings of intense learning so they can gain a working knowledge of the new technology.

Another example is board experience. Often executives have the opportunity to present to the company's board of directors. For a new leader, this can feel like being on a trapeze without a net! An advisor is that net, working alongside the new executive to help them understand the audience, what works and doesn't in this situation, and how to prepare for and practice a board presentation.

HR Business Partner

The HR business partner can be a key, well, partner for leaders. They know the organizational culture and values. They're experts on HR programs and leadership expectations. They support leaders in a broad suite of talent programs, like succession planning and annual reviews. They can be a powerful ally for a leader and a helpful input for the coaching process.

Guides

Another support structure for executives is a newer concept called a "guide" or "navigator." Internally, the guide is very helpful when an executive is new to a company (as part of onboarding) or new to a level or role (as part of the transition plan). This person, often assigned to a new executive, helps show the executive the ropes of the company. The guide has walked the path ahead of this person and figured out a few helpful things to jump-start learning and assimilation. Additionally, there are associations such as SCORE that offer business mentors who are similar to a guide as described in this section.

Requirements of a Good Executive Coach

Wherever you may be in this journey—an emerging coach who just finished coaching school and is seeking your first paying client, or an extremely experienced coach who has worked with hundreds of people over many years—those who do the best, including financially, are the ones who have a deep passion for the work itself, high emotional intelligence (EQ), and the ability to truly care for and connect with their clients. Coaching requires honesty, rigor, skill, motivation, and commitment from both the coach and the client.

After mentoring aspiring coaches and entrepreneurs for many years, I have observed that many coaching schools seem to certify new coaches without proven models that can be leveraged as they begin coaching, and very few offer practical advice for starting a coaching practice. This might leave you wondering which credentials are really necessary to be successful, and whether you really need a dual PhD (no, you don't). The main requirements for being a great executive coach are:

1. **Experience as an executive or a senior leader.** Experience is the best teacher, so it's necessary to have operated at or near the level of your clients. This helps you gain a true sense of their challenges and their world. Having worked as an executive or a leader gives you credibility and confidence to operate as an effective executive coach. It gives you the ability to translate your own experiences into competencies—what it takes to be highly effective at this level—and to use those competencies to help your client grow. Unlike some other methods of support, in coaching I encourage you to offer your expertise to support a client in their growth. Why let your client spin and waste time if you have experience in an area?
2. **Deep understanding of human motivation.** An essential role of a coach is to keep your client engaged in making significant changes through the coaching process. Knowing how to identify and stimulate their motivation is key as you work together

to create an individual development plan (IDP) and engage in experiments, observations, and reflection to tie coaching work to the outcomes that motivate your client. Having and honing your ability to identify levers to motivate your client, keep them engaged, and offer meaningful rewards that keep them in the game is a core competency. Your client may be motivated by prestige, approval (even your approval!), enhancing their public image, mastery of their role or a skill, competition and winning, rewards and recognition, accomplishing something important, or belonging in a team, organization, or community. The list is almost endless—we are all unique in our experiences and approach to our work. During the initial chemistry meeting with your client, and then throughout the coaching engagement, tune into what your client says about what motivates them. Use these insights to keep them motivated to do the work of the coaching program. If you don't have a psychology degree (or perhaps you do, but you forgot the motivation classes!), consider taking a class or module in human motivation.

3. **A clear and transparent methodology.** You're in the unique and privileged position of working with a human being on important goals for their work and life. You should not enter this dynamic without a proven methodology. That is the focus of the first half of this book: providing a proven method to have a powerful, productive coaching engagement that is fulfilling and reaches the client's goals. Develop your capability and confidence with this method, and then hone your capability as you work with each client.

If you meet these requirements, you do not need to go through a coaching certification program to be successful. If you do want to go through a certification program, make sure to vet it thoroughly. I also recommend that you have a coach yourself—one who has successfully built a coaching business. The support from your own coach will help ensure the coaching you provide is free of your own biases. You could also join a forum for coaches to compare notes and share trials.

Executive coaches must create a safe, structured, and trusting environment. The coaching relationship is creative and dynamic with a goal to maximize the leader's professional potential. The best coaches inspire their clients to build leadership competencies, experiment with new skills, reflect on the outcomes and impacts, and set goals to continue to improve. Executives do great things and achieve monumental goals thanks, in part, to an effective coach.

To build on the previous three facets of your strong foundation, the following key skills are crucial to have and develop throughout your coaching career:

1. **Listening.** It may be obvious, but listening is a forgotten art in leadership. Being able to listen to what is being said and not said is an essential skill. Learn to hear how something is being shared, and use those cues as opportunities to explore the message further. Pay attention to tone, word choice, and body language as cues for important information and areas to further explore.
2. **Asking skillful questions.** Knowing when and how to post provocative questions is the science and art of coaching. This is learning to tune into your instinct about what is being shared and ask the question that needs to be asked to deepen your client's learning and development. For example, you might have a client who is skilled at throwing blame and refusing to take ownership of issues. Reflecting this tendency back to your client can open up a meaningful dialogue about this pattern. You'll find many skillful questions in chapter 4.
3. **Courage.** Coaches must have the courage say the thing that needs to be said, even if that's not what you would say in "polite conversation." You are the client's champion and, in some ways, also their challenger. It's your job to help them stay focused on growth, take risks to try new things, and learn from what actions they take (or don't take).
4. **Building rapport.** This is a unique relationship, and knowing how to build rapport quickly and maintain trust is essential. For example, making eye contact, asking clarifying questions, and restating what your client says can be powerful ways to develop rapport, elicit honesty, and uncover truths, especially with clients who are less than enthusiastic about plumbing the depths of the issues you were hired to explore.
5. **Emotional intelligence (EQ).** This is your ability to perceive, use, understand, and manage emotions in real time in a coaching conversation. Learning to recognize your own emotions and those of others will help you create a safe space for your client to practice new competencies, whether that be effective delegation or delivering a strategic plan to the company's board of directors. It also helps you tune into what is happening with them in each session to ensure the appropriate climate for development.
6. **Focus.** It can be enticing to get caught up in the story or crisis of the day. These are meaningful things happening in your client's life. However, your job is to hold

the thread of development throughout the coaching journey, from conversation to conversation and in between. Stay focused on the IDP, the actions and experiments, and client observations in each session. Don't let your client stay too long in their stories; bring them back to their development of competencies.

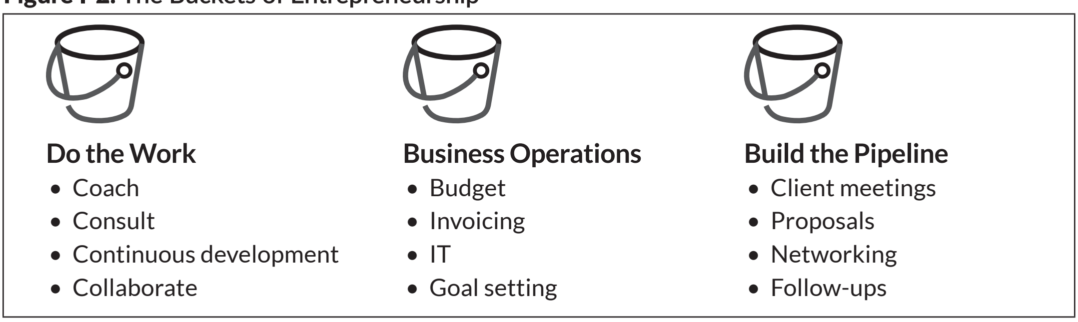
7. **Identifying executive competencies.** Building on your experience as an executive, you have an ability to identify competencies that another leader may need to develop. By pulling from your own experience and leveraging the resources in this book, your ability to quickly and succinctly identify relevant executive competencies to deepen or develop will be key to your success as a coach.
8. **Summary and reflection.** It's helpful to know how to summarize key points, share those with your client, and offer reflection on what has been shared. This can help your client see things from another perspective, understand more thematically what may be happening, and take further action on their development areas.

What Makes a Good Entrepreneur?

In addition to the core capabilities to be an amazing executive coach, you also need the chops to run your own business. This is covered at length in the second half of this book, including several assessments to help you identify your strengths and where you might need to further develop your entrepreneurial skills.

To foreshadow, think about the breadth of responsibilities you will carry as an entrepreneur and how you'll plan for excellence in each key area (Figure I-2).

Figure I-2. The Buckets of Entrepreneurship



You are likely highly skilled in several areas and can ground your start as an entrepreneur in these strengths. There are probably also areas where you are not as strong because you haven't had the exposure, education, or experience to deepen those skills. No problem; loads of resources are available to help you round out your entrepreneurial skill set.

The Power of Relationship

I discuss the intentional client-coach relationship throughout this book, so I thought it might be helpful to foreshadow what this means in the context of a coaching relationship, which I expound on in chapter 1. Research shows that the strength and quality of the coach-client relationship are the best predictors of positive outcomes (DeAngelis 2019). That's why I focus deeply and with some urgency on this topic. I cannot overstate the importance of having and always strengthening relationship skills. A caring, trustworthy, and skilled executive coach builds a strong, positive relationship to support their clients in achieving their dreams and becoming the desired future versions of themselves.

You may have many kinds of relationships in your life. Some are temporary or transactional; others are deep and enjoyed over many years or even decades. The effective coaching relationship is both profound and temporary, which is one of the reasons it is unique and powerful for both your client and you.

Another, perhaps more important, reason this relationship is unique is the nature of the work you manage together. You are on the inside of a successful executive's world, where they have ascended to a high level in a company and an industry, lead large teams, manage huge budgets, navigate constantly changing landscapes in their industry, and work with hundreds of people week in and week out. Most leaders are not prone to showing weakness or sharing lofty goals with just anyone. You are their broker of hope, the person engaged with them to help them achieve their goals and grow their capabilities—often beyond what they had envisaged. This is a highly vulnerable engagement that demands trust and support from both parties. You are of service to your client in a unique and transformative way.

Because of this unique relationship, it's crucial that you engage with a particular focus, skill, and intention. You need to continuously develop mutual trust and respect throughout the entire coaching program and keep communication lines open and customer focused at all times. Your ability to build and maintain a transformative relationship with your client becomes the calling card for your entire business. Coaches who struggle with relationship skills will certainly struggle to be effective executive coaches. These competencies are fundamental—the essence of coaching. Without them, great coaching is not possible.

There are five superpowers when it comes to relationship skills in coaching: beacon of hope, customer focus, monitoring and building the relationship, integrity and trust, and perspective. These are covered in detail in chapter 1 and called forward throughout the first half of the book to highlight the most critical relationship skills at each step of the coaching process.

In This Book

As an executive coach with the opportunity to transform leaders, you have a powerful influence on the success of your leader's company and its people. Because you have that responsibility, I want to thoroughly equip you for the job.

Part 1 of the playbook is focused on the four-step coaching process and the tools and templates I have used in each phase of executive coaching. You'll learn everything you need to know about beginning, assessing, setting goals for, implementing, and closing out a coaching engagement. I offer you a proven methodology with numerous client examples to illustrate key points. Downloadable documents and templates make the application of my method truly turnkey, saving you time and effort every step of the way. Creative prompts and checklists help you think through solutions to your most pressing problems.

Check Out the Templates!

More than 75 templates are offered for your use, in whole or in part, to help you put these tools to work immediately. Put them in your own words, make them your own, and choose the ones most useful for you and your coaching business. Remember to put your business logo and information on them to begin to build your brand! The templates are all downloadable online at www.td.org/book/the-executive-coaching-playbook.

Part 2 is about you—the entrepreneur—and your business. I explore what it means to be an entrepreneur: the good, the bad, and the ugly. I offer guidance on defining your business and setting yourself up for success with the right business structures to start or grow your practice. Start-up ventures can be challenging; these business insights and templates will help stack the odds in your favor. I also talk about how to take care of yourself in this thrilling and challenging world of entrepreneurship. You are, after all, the heartbeat of your company, and if you don't take good care of your mental, emotional, physical, social, and spiritual needs, your business will suffer.

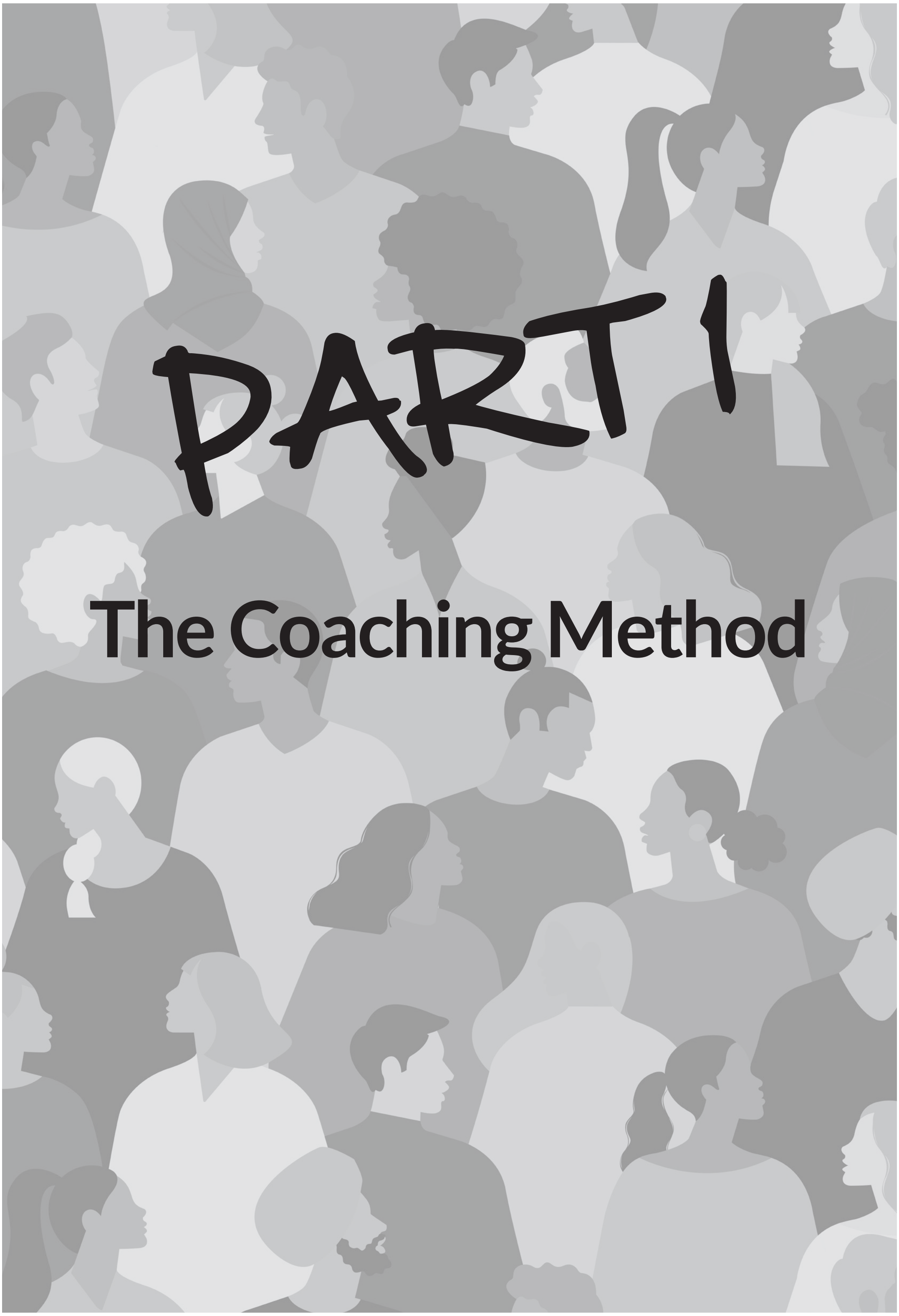
I will know I have succeeded in helping you as a coach and an entrepreneur when you are thriving in your practice and your work is helping shape and improve the work of the executives you coach. These individual improvements extend to their teams and companies, changing how they perform and increasing their chance to make a positive impact in their industry and on the world. While you may think about coaching as a one-on-one engagement with a local impact, I like to think about the aggregate impact of all coaches and how making one small change or improvement with one leader can have a global impact. That is the hope and inspiration for the work all coaches do.

Becky and I want to see this book beside you at a coffee shop, with writing in the margins and important pages turned down for quick reference, a statement of your joyous consumption of the content and key learning. Read it, make notes, put stars next to important topics, and underline key points you want to remember. And take advantage of the vast library of templates and tools prepared for your coaching practice, adapting them to your needs.

Becky and I wish you great success, a thriving business, and deep professional and personal fulfillment in this noble profession!

PART 1

The Coaching Method



Chapter 1

Begin Your Coaching Engagement

"Coaching is unlocking a person's potential to maximize their growth."
—John Whitmore

"The ability to learn is the most important quality a leader can have."
—Padmasree Warrior

"I absolutely believe that people, unless coached, never reach their maximum capabilities." —Bob Nardelli

In this chapter, I cover:

- An overview of the four-step executive coaching process: assessment, goal setting, implementation, and review and wrap-up.
- Establishing your client: Learn how to build authentic and memorable rapport while taking care of the business side of coaching efficiently and effectively.
- Identifying client personas: Explore how your client may fit the mold of some classic profiles, and use that as your springboard for considering how coaching will benefit them.
- Managing the sponsor: Many of your clients will be sponsored in a coaching engagement. Make a plan for how you will care for this important relationship.
- The power of relationship: Take an in-depth look at how the relationship fuels a coaching engagement and the relational competencies you'll need to nourish.
- Uncoachable clients: Examine what this might look like and how you can react constructively.

My model of coaching yields fast and deep results for your coaching clients—and makes for a smooth ride for you, the coach. I have built and honed this method over 30 years, using a unique blend of experience:

- **Executive leadership.** I led my first company as a CEO at 38.
- **Psychology education.** I have a PhD in clinical psychology.
- **Adult learning expertise.** I have a PhD in organization development.

This trifecta of key ingredients makes up the model you'll learn in this book. When I founded my practice, I called it "personal consulting" because the term *executive coach* didn't exist yet. Now, in a business world that's more attuned to the benefits of executive development, you will learn to employ the process with transparency and confidence.

As we begin the four-step model, let's assume that you have a client (yay!) and that the groundwork needs to be set for a successful coaching engagement. In the second half of the book, I discuss more about how to land clients, with a whole chapter dedicated to business development and client acquisition.

The Four-Step Coaching Process

The coaching process I outline in the coming chapters is divided into four steps:

- Assessment
- Goal setting
- Implementation
- Review and wrap-up

You'll want to make sure that the client, the sponsor, and anyone involved in the client's development understands the purpose of each step. "Overview of the Coaching Process" (Template 1-1) lays out the components of each step as a visual checklist, so you can pull it out as an aid whenever you're talking to someone about the process.

In a multimonth coaching program, the time invested in each stage varies. In general, the assessment and goal-setting steps are about 25 percent of your time, implementation is about 70 percent of your time, and review and wrap-up is the final 5 percent. You mostly spend your time on implementation with your clients, which is built upon the previous two steps; exquisite work in assessment and goal setting supports a more meaningful implementation.

Looking ahead to the overall coaching program, the approach, frequency, and duration can vary widely. A six-month program is a common approach, with coaching sessions held every other week. Another approach is more intensive workshops with a client, spending multiple hours on-site with them, then meeting again several weeks or months later. The approach you use is designed with and for the client, to meet their needs while ensuring a frequency that keeps them in the process throughout the program.

At times, you may have a client who wants to continue the coaching engagement past the initial coaching program design. Perhaps they secured the new job, got the promotion, changed companies, or have a more persistent development goal that needs a bit more time to refine. You can manage this request by securing another coaching contract and continuing the coaching program, perhaps revisiting the individual development plan (IDP) given the updated circumstances. Your client may simply want the option to "phone a friend" to get them through a transition or tough circumstance; in that case, you can sort out your pricing and agreements for this more just-in-time coaching support. Be prepared for this request, which occasionally comes up toward the end of your initial coaching engagement.

Template for Success

Template 1-1. Overview of the Coaching Process An overview of the four-step executive coaching process for you to share with your potential client, 360 interviewees, sponsors, and so on. You can also use it as a marketing piece.

Assessment

The assessment process is crucial because it sets the stage for the entire coaching journey. In this step, you begin to build rapport and a relationship with your client focused on supporting their development. You start collecting information and data from your client and their key stakeholders and putting together patterns and ideas about competencies that could be appropriate for the client.

The initial assessments are meant to help you have a full and true picture of your client: their strengths and areas for growth, and even behaviors they may be unaware of. These assessments allow you to uncover the opportunities that coaching is uniquely positioned to support, and quickly and objectively align with your client and key partners on the priorities for the coaching program and their role in the development journey. This is like an X-ray of your client: no secrets, no surprises.

The assessment step includes these processes, which are mapped out in detail in the next chapter:

- **Self-assessment.** This reveals the executive's perception of their strengths and areas for development.

- **360 feedback.** This helps uncover how the executive is perceived by four to six close leaders, peers, and direct reports. You get important insight about what the client needs to do more of, do less of, start, or stop. You also hear the priorities from each of these individuals about the top things this leader can do to improve the team or organization.
- **Psychological profiles.** Conduct personality, psychological, and performance assessments, each of which has unique value and insight. Together, they uncover important themes for your leader.
- **Other inputs.** These could include business plans, performance reviews, employee engagement data, or customer feedback.

Goal Setting

The next step is to define goals with your client. Together, you review all the inputs received in the assessment process and align on the top competencies for the coaching program. I recommend three to five focus areas to improve the likelihood of making gains in these critical areas. In this stage, I extensively use the book *FYI: For Your Improvement* by Michael Lombardo, and recommend that both you and your client have this critical tool handy. You will also lean on it heavily during implementation.

In defining goals, your client creates (with your guidance) the IDP, which is the bedrock of the coaching engagement. You agree on competencies, skills, behaviors, and measures of success. You discuss the timeline and processes by which the program will be implemented. And, you help your client identify resources available to them to support their growth.

You also discuss obstacles and challenges, and plan for ways to overcome them. Encourage them to review the IDP with their manager and colleagues so they can begin to feel the support structure available to them as they start the coaching journey.

Implementation

Now the work begins in earnest! The implementation step is where the bulk of the coaching journey happens, with a sequence of coaching sessions over several months. You implement actions and experiments that are aligned to the competencies identified in the IDP. These are new behaviors or ways of leading that your client is motivated to develop or improve. Often homework is assigned to help your client deepen their understanding of a topic or apply the learning in a new way. Your client brings in observations about those experiments, what they learned, and what they will try next time. You and the client review how these actions and experiments are or are not moving them toward their identified goals.

There is rich discussion and feedback in each session, aligned to the competencies your client seeks to improve, such as decision making, planning, time management, or political savvy. You uncover barriers and tackle them immediately with helpful interventions. You continue to shape their motivation and keep them engaged in their development. The templates in the implementation chapter will help you consider interventions and experiments aligned to targeted competency development.

Your client is working hard to practice a new way of thinking, behaving, and being. This is tough work, but it's essential to ingraining new executive competencies. During this step, you will both lean on the power of your coach-client relationship to progress toward executive competencies. This will motivate your client and help them feel safe to try new things, and it should be part of the undercurrent of every coaching meeting.

Review and Wrap-Up

When you're about three-quarters through the implementation step, you should begin wrapping up with your client. Conduct a post-360 process to collect feedback from the initial input group to determine if your client has achieved the desired changes in competencies, skills, behaviors, and measures of success. This gives you powerful feedback to focus the final 25 percent of the coaching program on ensuring that the key stakeholder group is experiencing shifts in your client. You also have an opportunity to advocate for your client with these key individuals, seeking their support of your client and the hard work your client is pursuing.

In this step, you document and celebrate wins with your client. You provide an updated assessment, include recommendations for continued work, and encourage your client to share this information with their leader. When there are only a few coaching sessions left, remind your client that the end of the coaching engagement is coming; ask what they want to focus on in the remaining time you have together, perhaps informed by the updated 360; and begin to prepare them for separation from their trusted partner—you! Let them know you'll want to reflect on the coaching journey and share feedback with each other in the final coaching session so they can prepare with intention and forethought.

Finally, it's time to part ways, for now. The final sessions are a time for your client to reflect on the journey, share what they've learned, and offer any feedback to you as a coach to support your continued growth. You secure agreements about continued contact and separate thoughtfully. This is a time to wrap up this one-of-a-kind relationship and create a reflective, supportive, thoughtful goodbye.

Establishing Your Client: The First Meeting

Congratulations—you booked your client! Clients come to you in various ways: through your own business development or networking, through referrals from colleagues or other coaches, or by word of mouth from prior clients, just to name a few. It's important to get started with the client as soon as possible.

You have probably already met the client and their sponsor (if they have one) during a chemistry meeting (covered in chapter 9). However, there is still helpful context to be set as you begin a client engagement. All the up-front work to prepare yourself for a successful coaching engagement is just as important as the engagement itself. In fact, without a little homework and preparation, you might not secure that client after all. You may have already gathered some of the following information when you first met the client or their sponsor, so try to be as efficient as possible in these meetings by avoiding redundant questions or asking the leader to do more intake work than you truly need.

A corporate client (often an executive leader or the head of HR) might contact you about a particular employee they'd like you to coach. We'll call this person the "sponsor" throughout the book—the person who is engaging you if it's not the executive themselves. Although the person who pays you may or may not be this executive leader, your true client and your focus is the person you're working with in the coaching program. That is whom I will refer to throughout the book as your "client."

An individual client may seek out coaching services directly, perhaps learning about you through a colleague or friend. Because this person is paying out of pocket to secure your services, not as part of a corporate contract, it signals high motivation for what coaching has to offer.

It's helpful to remember that regardless of how the relationship came about, everything you do from this point forward should be in conjunction with building and maintaining rapport. Relationship building is the result of your thoughtfulness in the questions you ask and the way you ask them.

Getting Started With a Sponsor

If your client has a sponsor, request a meeting with both of them as soon as you can. If your client's company is sponsoring coaching as part of a program, it's important to include the program manager in the intake and evaluation process. Include them in the interview process as well: Ask them about the leadership requirements in the program, and clarify what this leader (your client) is expected to master. Template 1-2 offers an email template for the sponsor outreach.

Do a little homework before this meeting, but remain open to what gets revealed in the initial conversations with your sponsor. Learn about the company and industry, especially if they are new to you. Come prepared with thoughtful questions for the sponsor about the purpose of the coaching program, why this executive is being selected at this time, and the leadership model and expectations for this leader. Template 1-3 gives you a good framework for this conversation with the sponsor, but tailor it to your situation so you can maximize time. You might even want to share these questions with the sponsor in advance so they're prepared.

This first sponsor meeting is meaningful and instructive. It's crucial that you understand their expectations, how they have been working with or coaching your client on the topics of interest, and how they will stay engaged throughout the process. You will find out who your coaching client is and take care of the business side of contracting your services.

If you're hired for an in-house leadership development academy or acceleration program, the coaches (there are often more than one to cover the needs of the cohort) meet with the sponsor first to understand the goals and outcomes of the program, the rules of engagement, the purpose of the program's coaching piece, and the program's curriculum and timeline. A group kickoff will likely cover this foundational information, and then you'll be matched with your clients.

For a closely managed engagement like those described in the book, it would be more common to meet with your client and sponsor together at the beginning to set expectations, in the middle to check progress and make any adjustments, and again at the end to review progress and outcomes. Although you will get some information about *who*, *what*, *why*, and *why now* from the hiring executive, the real insights and purpose will emerge in a conversation with your client, so be sure to schedule that as soon after the initial sponsor briefing as possible.

Templates for Success

Template 1-2. Sponsor Outreach Email
An email to arrange a meeting with your client's direct leader and the leadership program manager before the coaching engagement begins. You'll use this meeting to ensure that the sponsors are engaged in the coaching process and that you understand their goals for sending their employee to coaching as part of the leadership development program. Your client should also be present at the meeting.

Template 1-3. Sponsor Interview
When someone other than your client has hired you, this is a starting interview format to collect initial information about your client, the company, and leadership expectations.

Getting Started With the Coaching Client

When coaching is sponsored, it's still important to meet the coaching client early and determine if you have good chemistry for the development partnership. You'll want to understand if your client knows why coaching is being offered to them, especially if the sponsor has a "fix this behavior" tone. You'll also want to assess if the client appears open to coaching and development. Do they respond to your initial questions with an open posture and interest in learning more? Or do they seem defensive or overly tied to their title, position, or authority? Conversely, be aware of how you are coming across. Your goal is to be warm, authentic, articulate, prepared, respectful of their time, organized, and confident about your clear method (all good coaching competencies to hone throughout your career).

Your client is a busy executive who will want to know what they're getting into. They will begin deciding right away "if the juice is worth the squeeze." Your job is to help them see the tremendous investment being provided and why it's in their best interest to engage in this development opportunity fully and openly. You can use the worksheet in Template 7-3 to help your own thinking about the return on investment (ROI) of your coaching offering and maybe share it or its concepts with the sponsor.

During this meeting, ask the client, "Why coaching now?" Perhaps they have just taken a new job and could use some focused support for the first 90 days. Or they may be on a succession plan for the top job. Or maybe they have a few key competencies to develop, such as executive presence, public speaking, and strategic planning. Coaching can accelerate this development and prepare them to be succession-ready much sooner than if they were on their own. You can use Template 1-4 as a guide for the conversation.

ON THAT NOTE

Meeting Location

A coaching engagement involves lots of meetings, so it's important to discuss where to meet. Virtual coaching over a videoconferencing platform has become the norm, and the good news is that these tools allow executives and their coaches to continue with their programs regardless of work location. The downside is that a lot is missed when meeting only virtually. I highly recommend that at least a few of your coaching sessions are in person, to bring back more of the deep learning and relationship building that is available only in person. Although this is more time-consuming and might narrow your client base to those geographically closer to you, in-person coaching yields better results.

If you can meet in person, be sure the setting is appropriate and private. You should also build in observation time to see your client in action with their team or key customers. Sometimes, weather and time permitting, it's nice to get out of the office and change up the scenery for your coaching session. Go on a walk or find a quiet spot in a nearby park. Shifting location can be a powerful lever for learning new things about your client. Of course, build into your contract the time and cost of travel.

Underscore with your client the difficulty of doing new things and learning new skills. Help them understand that what is difficult is not impossible. You are there to support them in their journey and help them learn competencies like executive presence, collaboration across organizational boundaries, or listening and communication skills to achieve their goal of a promotion, increased job scope, or creating a productive and positive team climate. As you can see, a lot happens in this initial meet and greet!

In subsequent meetings, you will share the purpose of coaching and the overall timeline for the coaching program. You will review the four steps of the executive coaching process (Template 1-1). I recommend also sharing your executive coaching bio, which we'll review in chapter 9 (Template 9-2). Helping your client understand what coaching is, why it's being offered, and what to expect is essential.

At the end of this first meeting, or even before the meeting, ask your client to complete a self-assessment (more on this in the next chapter), which provides an essential tuning fork for their self-awareness and growth path. It's helpful to learn in this initial conversation the individual's goals for coaching. This engages them right at the start with thinking about their goals and how executive coaching can help. In advance of the first meeting, if you think this will be perceived positively and not as a time burden, you might request the client fill out and return a client intake form (Template 1-5) for basic information, as well as a coaching history form (Template 1-6) if they have worked with a coach in the past.

ON THAT NOTE

Paperwork

Many organizations and prospective clients do not like to do paperwork, especially of a personal nature. If your process is to obtain notes from the client, consider pre-filling as many fields as you can. This reduces the burden for them. If your client is not able or doesn't want to spend time on an intake form, you can use it as a template for your initial calls with them to guide your own thinking and initial exploration. Then keep these completed forms for your reference throughout the coaching engagement. Some clients may be concerned about privacy, so develop a clear guideline for how you store these materials and your document retention and removal timelines.

Your contractual terms and other initial documents are helpful to get organized and be prepared to present to your prospective client. Template 1-7 outlines the expectations I set with clients about our coaching agreement. If you'd like to move forward, you can give this to your client or at least review the expectations in conversation. If your client agrees to the expectations and your way of working, share an accountability form (Template 1-8), which they can use to select ways they'd prefer you to hold them accountable. For example, if they're not prepared for a meeting, does the client want you to reschedule with no questions asked, or would the client prefer you to press the issue and uncover why they weren't prepared? Again, this document is optional and can be reviewed in conversation if it'll be better received by the executive.

Templates for Success

Template 1-4. Client Interview
A conversation guide to learn all you can about a new client, their life as a leader, and their company and industry. This agenda is the framework for your first one to two conversations, depending on the amount of time you initially secure with your client.

Template 1-5. Client Intake Form
An intake form to learn a few basics about your client.

Template 1-6. Coaching History Form
A form that summarizes a client's history and results with prior coaches. This helps you understand their experience and engagement with other coaches to bring additional insight to your engagement. It also gives you perspective on how they think about a coach and early and helpful hints about the topic of relationships.

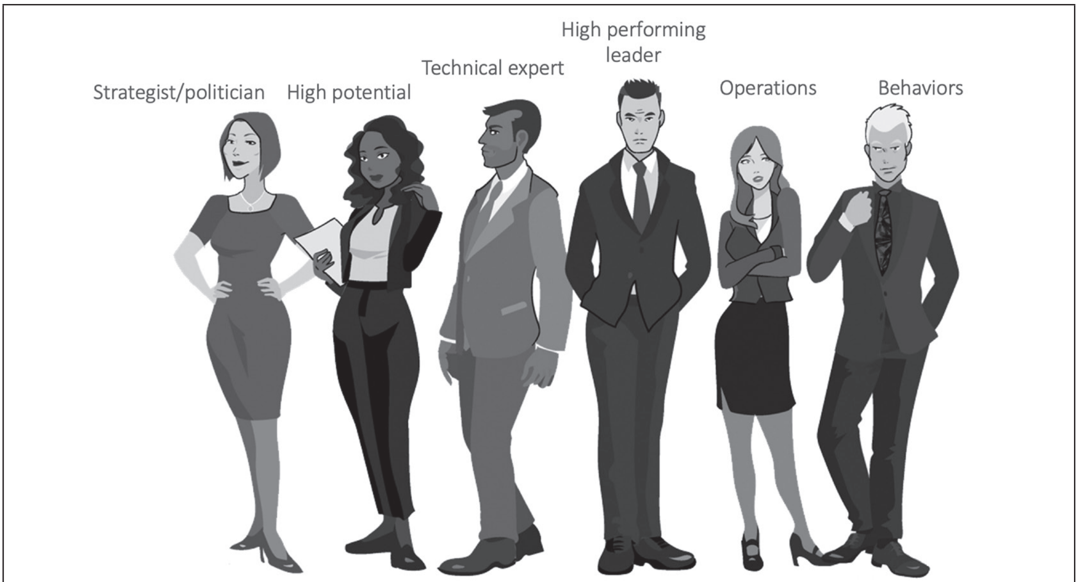
Templates for Success (Cont.)

Template 1-7. Expectations of Coaching Engagement Agreement This sets the stage for accountability and initial agreements between coach and client. Note that a C-suite client is unlikely to want or need this, so adjust accordingly! Use this with clients who need a lot of structure and accountability. You can cover this in a coaching session and send it as follow-up for your client to complete and send back.
Template 1-8. Accountability Form A form for the client who needs support outlining how they'd like to be held accountable.

Possible Client Personas

Many people seek coaching, and from my experience, a few archetypes can help you quickly get to the heart of the matter with different personas. After coaching executives for many decades, I have developed a few character profiles among this elite bunch of business leaders (Figure 1-1). Because they tend to be common personas among executives and can jump-start your thinking, I think they're helpful to share with the caveat that you must keep an open mind.

Figure 1-1. Common Leadership Personas



The archetypes are a good springboard as you head into the assessment step of your engagement. They can help you more quickly and deeply understand your client to the extent that the archetypes really fit them. But don't use them to stereotype your clients—

people are more complex than this! Be open to changing your mind and nuancing your judgment as the engagement unfolds. Let the process of getting to know your client be the truth in defining their unique persona.

You will likely walk away from your initial meetings with a good sense of your client and which of these personas feel like a possible fit:

- **Strategist/politician.** The strategist/politician is adept at reading the environment, building relationships helpful to achieving their goals, and influencing up. They are savvy conversationalists and quickly know who has the power in any situation. They may come to coaching to improve their peer relationships or more effectively inspire their organization to action.
- **High potential.** Many high potentials are on a steep trajectory and seek continuous growth. They may not have received development feedback before. Their skills are high and their desire for growth is even higher. They can be demanding and seek an intense level of engagement and sponsorship from their leadership. Many high potentials are part of special programs that include executive coaching to help them accelerate readiness for their next position.
- **Technical expert.** The technical expert is the person in the room who has the deep medical, scientific, or technical expertise required for the team or business to be successful. They may be an extremely talented software engineer who needs to develop some people skills, or an expert physician who wants to build stronger care teams. They bring essential technical skills to the team, and many seek a chance to round out those talents with other interpersonal competencies.
- **High performing.** Even leaders performing at a high level seek coaching. They may be on the succession plan for the CEO seat and need to grow in certain areas like managing a board or engaging with the investment community. They may be on the cusp of rotating to a completely new area of the company as part of their development and be seeking coaching to prepare. Every leader has areas to grow or improve and development is never-ending.
- **Operations.** Many operational leaders are the backbone of their company. After all, a company can’t run without effective operations in place. These leaders may need to grow their executive presence or presentation skills. They may need to improve their strategic thinking to balance out their robust analytical and operational thinking.

- **Fix 'em, please!** This is a catchall for another common client—the "improve specific skills" client. This can be someone who has an area for development that needs to be illuminated to continue to grow in the company, or a specific situation between colleagues that needs special attention. The behavioral needs are clear, and coaching is called in, sometimes as a last-ditch effort to help turn something around.

Think about these individuals: Which are you drawn to? Which may be challenging for you?

Keep the Sponsor Involved Throughout

It's important to remember the person funding this work if it's not the client directly. Keep the sponsor, typically the executive or HR leader in the company who is funding the coaching, apprised at the outset of the coaching program, with optional check-ins midway and at the conclusion. You want your client's leader or sponsor involved and invested in their development and acting as a day-to-day champion of this work. Your client is most likely a highly valued employee who is receiving coaching to help them accelerate to the next level, deepen or broaden their abilities, or quickly step into a new level or position. Their sponsor might need them to be successful in this work as quickly as possible.

Be sure to include your client in all conversations related to their development. You want your client to be present because you're brokering the conversation for development with their leader or sponsor. If there is any misalignment, you want your client present to help advocate for their development and ensure continued agreement and alignment with the development areas.

It's important to keep an oath of confidentiality with your coaching client. Therefore, any check-ins with the sponsor should only include process comments. For example, you might explain that you are halfway through the first step, still gathering the assessments and the 360 information. Or, you could say that you just finished the IDP and would be happy to share the competencies you're focusing on but are not at liberty to give details.

The first half of the IDP, which lists competencies, behaviors, and challenges, is the only nonconfidential part of the document. It's high-level enough, especially without the experiments, to share. Keep the client's profiles and 360 input handy, but never, ever provide this detailed information to the coaching sponsor. This is for your confidential work with your client, not to be shared more broadly. It's imperative that you never dip into the content of the coaching conversations or the work you're doing with your coaching client.

That is their development work and their story to tell, if they choose. Keep the updates to short phone calls versus extensive notes or documentation.

Sometimes a leader can attempt to enlist you in giving confidential performance feedback about their employee. However, this is not your role and it's not appropriate given the confidential nature of the coaching engagement. You can speak to the four-step model of coaching, where you are in the overall journey, and any observations about your client related to their engagement with coaching: Do they show up to coaching sessions? Are they prepared? Have they done their homework? Do they seem engaged in the experiments and the self-reflection? If the leader asks for more information, politely encourage them to set up a three-way conversation with their employee. It's the client's responsibility to represent their development plan and progress against those goals.

CLIENT SPOTLIGHT

Keeping a Promise of Confidentiality for David

At a recent executive team strategic planning session that Becky was leading, the CEO pulled her aside to check in on one of his employees who had recently begun coaching with her. He gave the "wink and nod" look when asking about David and was curious about his progress. The CEO asked for time at a break or lunch to discuss it further.

When they met, Becky addressed where they were in the coaching process, reiterated the focus areas already discussed with this leader, and shared her perspective on David's engagement in the coaching process. After she paused, the CEO then prompted, "Well, how is he doing? You know, is he going to turn this thing around?" She replied that more exploration of David's development and learning from coaching should be discussed with David present. She reminded the CEO that they had a midpoint check-in coming up in a couple of weeks, and that if he wanted to meet earlier, they could set a meeting for the three of them to discuss the coaching program. He seemed to take the point and said he'd raise his questions with David in their next one-on-one meeting.

It can be challenging to hold your ground with a leader. Becky knew that the CEO was asking from a space of kindness and desire to help, but that keeping David's development journey confidential was of utmost priority. Also holding the space for the client, David, to hear directly from his leader is a powerful connection a coach can help make happen.

> Competencies:
> Leadership presence, effective delegation, collaboration skills

Some sponsors want to be apprised of progress, and some do not. Asking up front what their preference is and agreeing on the number of meetings they want to have during the coaching span is helpful. You don't want to bombard them or, conversely, leave them out. Template 1-9 provides a sample email for updating the sponsor.

Your first check-in should happen during the goal-setting step. As you align with your client on three to five competencies, targeted behaviors, and the first set of actions or experiments to begin living into these new competencies, debrief the sponsor on this effort. This can be a meeting, or the coaching client could email their IDP to the sponsor, copying you. If you are meeting, propose an agenda (such as one in Template 1-10) in your email invite to focus each check-in conversation and maximize time; attach your "Overview of the Coaching Process" document (Template 1-1) to the email as well. When you secure time with the sponsor who hired you, this agenda helps you maximize your time with the leader while still allowing you to build your relationship and better understand the client.

About midway through the program, while you're in the implementation step, it might be helpful to have another check-in with the coaching sponsor, depending on what you both agreed to at the onset. This could be a simple email status update to keep the sponsor informed and engaged. If something has significantly changed from the outset, it may be helpful at this point to have a conversation. Changes could include a shift in the competencies or focus areas, challenging experiences when attempting to role-model new competencies or behaviors, a lack of sponsor support in critical group settings, or other such "yellow flags" that would be helpful to address in person. Again, this meeting would be held with your client present and addressing any of the development content in the conversation.

Near the end of the contracted coaching program, it's important to offer a final meeting with the sponsor, again depending on what the sponsor desired at the onset. Template 1-11 offers an email you can modify for the outreach to the sponsor. After you secure time with your client's direct leader or the HR leader managing your client's program, use the "Program Completion Sponsor Meeting Agenda" (Template 1-12) to review the coaching outcomes and bring their involvement in this process to a satisfying conclusion. If those templates seem like overkill, you can use the IDP to anchor the discussion. Your client's progress can be reviewed and celebrated, and any follow-up actions or further development recommendations can be contracted with the leader. If you feel more work could be done, you can assess their interest in a check-in or further coaching in six to 12 months, which can be discussed and agreed to in this meeting as well.

CLIENT SPOTLIGHT

The Value of an Engaged Sponsor

Becky coached Lani, a midlevel manager who was having difficulty with her direct manager, despite having completed an in-house mediation to address the conflict. The relationship needed intentional focus to have a chance to repair.

When asked how to engage the skip-level executive who sponsored Lani into coaching, Becky and the client agreed to set up three calls with this sponsoring VP. In the initial call, Becky reviewed the coaching model and timeline, and Lani shared her reason for seeking coaching and the key competencies she and Becky would work on in the coaching engagement. At the midway checkpoint, they reviewed progress in a similar fashion, with Becky focusing on the coaching process and Lani focusing on the development process and insights.

In the final meeting, Lani briefed the VP on the coaching outcomes. In turn, the VP was able to share the positive feedback he had received from Lani's manager and peers about the changes Lani was making and the positive impact on the team. A beautiful thing then happened. The sponsoring VP shared more about himself, his journey in the organization, and his prior experience with coaching as a huge lever in his own development. This personal reveal was a tremendous moment of connection between these two individuals and helped galvanize their own relationship in a meaningful way.

Competencies:
Communication skills, building trust, interpersonal savvy

Templates for Success

Template 1-9. Sponsor Status Update Email
An email to contact your client's manager or the sponsor of the coaching engagement, suggesting a short meeting to share progress or provide a high-level written update via email.

Template 1-10. Sponsor Check-In Meeting Agenda
An agenda to follow with your client's manager or the sponsor of the coaching engagement to keep them apprised of the coaching program's progress.

Template 1-11. Program Completion Sponsor Email
A sample email to use as you near completion of the program, securing time with the client's direct leader or the HR/L&D program leader to review the outcome of your client's coaching engagement.

Template 1-12. Program Completion Sponsor Meeting Agenda
A sample agenda to use with either the client's direct leader or the HR/L&D program leader to review the outcome of your client's coaching engagement.

The Power of Relationships

You just read about several essential relationships, so this seems like an excellent time to dive deeper into the power of relationships and the fundamental importance of relationship skills as an executive coach. Think of this as the essence of executive coaching, the core capability that will make or break your coaching engagement. Your relationship skills are key to differentiating yourself in an increasingly crowded market.

The stronger and more genuine the coach-client relationship, the easier, deeper, and faster the client progress will be. This is a key premise of my powerful and intimate method of coaching, which is also backed by clinical research.

This relationship, rooted in the X-ray of the client from their psychometric profiles and 360 input (which we'll dig into in the next chapter), is tender and vulnerable and requires continuous attention and development. This is the primary way you can help the client achieve their IDP goals and dreams.

Why the Coaching Relationship Is Critical

Research shows that the strength and quality of the coach-client relationship is the best predictor of positive outcomes (DeAngelis 2019). A caring, trustworthy, and skilled executive coach builds a strong, positive relationship to support their clients in achieving their desired future version of themselves. There is empirical research about the power of relationships, and it mirrors the link I have found between a positive relationship and excellent coaching outcomes.

For example, I often win bids over other coaches or I'm brought in without a request for proposal because of someone's direct experience working with me or through word of mouth. It's true that clients sometimes remember that there are four steps in the method, but they always refer to the relationship as what made the most difference. My ability to care and commitment to going the extra mile as part of the coaching experience made a lasting impact.

The Main Emotional Aspects of the Relationship

My approach is client-centered and bespoke. Taking the relationship from the client's perspective, we see the following three main elements:

- First, the power of being *understood* is a relationally transformative experience for clients, because people around them usually see the executive through their own lens of projections, needs, or power structures. To listen fully to your client, to slow down and fully understand what they are saying, experiencing, and hoping for—and why—is to deepen the relationship in a positive and unique way.

- The power of being *remembered* is the next, deeper layer. As the coaching work progresses, there is an evolving bank of the client's stories, facts, IDP experiments, and insights. The coach is often the primary keeper of the memory bank, leveraging that to underscore, place in context, or celebrate new competencies and the client. It can be hard for the client to simultaneously build competencies and reflect on themselves. So the coach provides this remembering in an unbiased way, reflecting the client's experiences, feelings, goals, and transformations across time, which deepens the relationship. This is a rare kind of relationship in the executive's life, and perhaps only their physician or therapist would serve a similar role. So it will feel intimate, validating, and reassuring, and ultimately provide a sense of belonging.
- The power of *caring* is the third element of the relationship. Caring involves investing emotional labor, emotional intelligence, and authenticity. It is unconditional and requires the emotional capacity for both the client and coach to receive and allow each other into their hearts. Demonstrating care can take many forms, such as verbalizing feelings or carrying out the coaching method with care embedded and expressed as appropriate throughout. It's important to be cognizant of the theoretical framework of human motivation covered later in this book. Because it can be received as a reward by the client, it's important to show caring both when things are looking up and when things are looking down, being unconditional in your care in all circumstances.

As an example, I coached a client through several promotions, from VP to SVP and eventually to CEO of a biotech company. She was a scientist originally. It's lonely at the top, especially when new CEOs are promoted over their peers and have multiple parties, like the board and the public, to answer to. I suggested we prepare her inner-circle list of advisors and loved ones, and I saw my name on the advisor list along with attorneys and other key members of her inner circle. There was an asterisk by my name and her personal note: "She cares about me."

From the coach's perspective, to fully deliver on the three main aspects of the relationship, you will have to ensure that you clear your mind of baggage and biases, such as your own past executive experiences, preconceived notions about a client, or concerns about the company they work for. You will need to make room for the relationship, which requires time, mind, and heart.

Relationship Superpowers

Seeing this situation now from the coach's perspective, there are relationship competencies that the successful coach will need to build and continuously develop to have a positive relationship with the client. Let's first turn our attention to the superpowers of relationship skills in coaching. I believe so strongly in a coach's capabilities and continuous learning in these areas that I feature them above all other relationship capabilities. Deepen your strength here, and continue to work on these relationship superpowers, and you will have done a very good deed for yourself and your business as an executive coach.

Beacon of Hope

Remember the beacon of hope mentioned earlier in the book? It's back, now within the context of the emotional tone of the relationship. The idea of partnership is important to set out at the beginning, and within that partnership, the coach is a beacon of hope. Partnership is the emotional construct of the relationship, with the recognition that you are each skilled in different areas, and the partnership is what enables you to work through the four steps of the coaching engagement to yield great results for the client. Partnership includes many relational risks, such as coach feedback to the client (and vice versa), trust, and vulnerability. Being the broker of hope in the partnership involves being able and willing to put forth alternatives or more hopeful situations than the client finds themselves in. Imagine shining a light down the path to help the client see their way through a thorny situation. That is the essence of showing up as a beacon of hope in this partnership.

Customer Focus

You need the ability to deeply understand your client and tailor the relationship to their individual characteristics, such as their cultural background, coaching preferences, emotional style, gender identity and sexual orientation, learning style, and religious or spiritual beliefs. Pay attention to different coaching methods, stances, and gestures appropriate to the client and the context. Be flexible, responsive, and willing to educate yourself on areas of life you perhaps know little about. Customer focus also involves emotional labor, being truly open to understanding and working with your client in an emotionally open and informed way. Customer focus is also demonstrated by how you structure your business and time.

Monitoring and Building the Relationship

It's fairly new to talk about these human conditions in a work setting. I meet people all the time who have no idea what an executive coach is or why you'd need one. So, working on the relationship in small bits and large sweeps is what "monitoring and building the relationship" is about.

There are power dynamics at play in a work setting that make it potentially risky to be vulnerable and share what's real in terms of relationships. The company and, by extension, the executive leadership (board or C-suite) hold most of the cards for salary, benefits, investment strategy (the company's and your own 401k!), when you can take earned vacation time, bonus structure, and many, many other aspects of earnings and job satisfaction. It can feel risky to give difficult feedback, ask for help with a board presentation, challenge a terrible boss, work toward a promotion that moves you out of your department, handle a tricky employee situation, and other leadership and management tasks a leader faces each day. How can you feel like a fully empowered free agent when there is such a power imbalance?

That is an essential job of a coach: to provide a safe space to address these obstacles and more. Focusing on the health of the relationship, in small and vast ways throughout the coaching journey, will help the coach care for the relationship while also teaching the client how to do some of the relationship work themselves.

Pay attention to how much the client opens up, trusts, and reveals. Do you start at the first step in trust-building at the beginning of each coaching session, or is there durability in the trust you have built so far?

Micro- and macro-monitoring of the relationship also includes listening for cues from your client about the health of the relationship. Watch their mood, energy level, and general outlook. Where are they placing the coach in the context of their life—as an essential relationship, an employee, a confidant, a glorified assistant? They will give you hints about how they think about you and the coaching relationship if you listen for them. Pay attention to how your client orients toward you or away from you during the coaching journey. Are they excited to tell you something, eager for the reward from you as their coach? Or do they dread telling you (or even don't tell you), because something didn't work out or they didn't do the practice exercises as agreed to? Remember to accept them as they are, in that moment, and ensure that they know they will be accepted by you as their coach no matter what they do or say. You may be the only unconditional acceptance they experience. Pay attention to how they receive it.

Integrity and Trust

I am not sure if this is a competency one can build or something one is born with; perhaps both. The coach's integrity needs to be obvious for a solid relationship to build. Being able to present options or feedback to your clients in a truthful and caring way is an important competency that helps build the relationship and establish or strengthen trust. Other aspects include admitting mistakes, keeping confidentiality, and using interpersonal savvy. Following through on commitments is important as you model integrity. You want your client to also follow through on their commitments, so it's essential that you role-model this from the beginning.

Perspective

Relationships are complex and dynamic. You may even experience shifts in the relationship within one coaching session. Perspective is also multifaceted. It's about tuning into the micro-feedback you may get from your client and attending to the relationship with a particular point of view. How is today different in tone or tenor? Did something just shift that you need to attend to? What is your perspective on the state of your relationship and dialogue at this moment?

It's also your job to offer alternatives or a new point of view to the client about their situation. Give advice, stepping in to help your client see something in a new way. Use your experiences to inform the situation and support your client in their development. This is a key competency for coaches and explored throughout the book, especially in the implementation step.

You can also directly seek feedback from your client, proactively getting their perspective, then incorporating that into the coaching goals along the way. Asking for their perspective on the relationship and how things are going is a powerful way to build trust and nurture the relationship. It also gives them a moment to pause and reflect, ensuring that any minor (or major!) irritations or missteps are discussed, versus being held in by your client.

More Relationship Competencies

For those wanting even more (gold stars!), many other relationship competencies can be useful in a coaching relationship. I briefly mention them here as encouragement and inspiration to go for more in this area of relationships.

Humor

Humor is such a stress relief and a means to build rapport and connection. It's healthy to laugh at oneself, both coach and client. The world these leaders operate in is complex, moves quickly, and is full of unseen potholes. Bringing humor into the coaching relationship helps your client find some peace from the intensity of their work world, releases endorphins, and helps strengthen the relationship. There are important cultural differences and context to pay attention to, however, and if the client says something inappropriate or offensive to any group, it's important to call that out. It's up to us to educate our clients. This can be a powerful teachable moment.

Look for a nervous laugh from your client as a potential opening. Known as Gallo's laugh, this is the nervous giggle some people let out before they do something new or are about to share something they're scared to share. If you have established a rich relationship, you will have an opportunity to ask your client, "I see you getting a bit nervous. What's coming up for you?" or some other skillful question to open the dialogue. Or maybe you leave it alone and come back to that exploration another day.

Patience

Development takes time, and busy executives are not always the most patient with themselves or others. They want to see progress quickly and can get frustrated if they don't. This is where you can support them with patience and kindness, helping them see how to give themselves these gifts. Clear out your own agenda for performance—your expectations of how quickly or efficiently this leader will "get it." They are on their own development timeline, and you are there to support them through their huge development spurts as well as help them navigate their obstacles. Remember to capture the obstacles in the IDP so you can have ongoing conversations about how to overcome them.

Handling Negative Outlooks and Emotions

Clients probably wouldn't be in coaching if they didn't have some negative feelings about the obstacles they need to overcome to achieve their goals and deepen their competencies. Unfortunately, it can be difficult for coaches to address clients' frustrations or their negative outlook. Some coaches can become frustrated themselves, which clients can take to mean there's something wrong with them. It's important to pay attention to your reactions and learn the early warning signals that you are building toward frustration. If you're distracted, bored, or wanting the coaching session to end, you probably are not in the best coaching posture to support your client. Be aware that clients can often pick up on your feelings, facial expressions, and tone of voice. Make sure there is alignment in these nonverbal and paraverbal forms of communication. If you need more time to prepare for a client and set aside your personal frustrations, build that into your preparation time.

Work-Life Balance

Pay attention to your own relational capabilities. The concept of self-care is also about your life and career as an executive coach. Where do you put the client in your life? How do you prioritize that relationship? Coaches can get overwhelmed with the emotional work that clients exact. It's important that you learn the right number of clients you can effectively serve. I'd recommend starting small and building up to a larger client base, always paying attention to your own relational capacity. As an example, someone I mentored to become an executive coach with my four-step method takes a maximum of six to 12 high-priced contracts with unlimited access per year. This allows him to be available and maintain customer focus. This approach is not for everybody, but it suits his and his clients' coaching needs.

Relational Capacity

The best coaches have the emotional capacity to engage deeply and proactively, both in the session and in between. They always keep the client in their thoughts. This helps the client feel special and important, knowing you are constantly thinking about them and their development. Relational capacity is not infinite. We each have a limited amount of capacity to care for others, attend to others' needs, and personalize learning and growth. Some clients need more of this attention than others. If you're going through a lot in your own life, that can affect your relational capacity. It's important to attend to your relational capacity in an ongoing and honest way to ensure you have the ability to care for your needs and those of others in your life and work.

Emotional Resonance

Paradoxically, it's important to maintain some distance between your client's challenges and your own experience of the same challenge. Keeping the focus on the client and their experience and interpretation of the challenging situation helps both parties to be clear about the work. Don't muddy your client's experience with your own unless it will benefit them. Stay in the space of expressing compassion and empathy for the challenge, be curious about what comes up for your client when talking about this situation, and remain laser focused on your client.

Be Real

It's tempting, especially as a new coach, to put on a facade of what a "good coach" looks and sounds like. Perhaps you think of your own coach, who had such an impact on you, or someone you saw presenting at a conference, who sounded like an awesome coach. This draw to adopt a persona can help people overcome a sense of imposter syndrome and adopt a way of coaching that they believe will be successful. The fact is, this doesn't work all that well. Putting on a face inserts a separation into the relationship. You are asking your client to trust you with potentially deeply held thoughts and challenges. You need to enter that relationship in an authentic way. Being real connects us all and keeps the focus on the client instead of maintaining a front. We are all on this planet trying to do our best, and I think it's best for you to keep it real with your clients.

Emotional Capability to Have Effective Endings

When it's time to end the coaching relationship, research by Norcross and colleagues (2017) finds that some key actions tend to promote better client outcomes. This includes having a mutual discussion about how the client did during the coaching journey, giving both the client and coach time to look back and reflect on the entire journey over several weeks or months. Then take some time to look ahead. Discuss the client's future progress without coaching, and how they will continue to use new skills and engage in competency development. Help them understand that setbacks are completely normal. And talk through how they'll recognize a setback and reengage with their practices and experiments to continue to develop through this setback. Put some forethought into how you want to celebrate and honor your client and their commitment to working toward their goals. Reflect on their gains and express pride in their progress. Be honest about your feedback and your own feelings about the relationship coming to an end, for now at least.

How to Handle Mistakes

You're going to make mistakes along this journey. Set aside the idea of perfection. You're working with humans, you're human, and mistakes and misunderstandings will happen.

When you mess up, it's crucial that you say it, own it, don't stay stuck, and move on to what it meant to the client. Eventually, at your client's pacing and preference, you'll work out a path forward, decide how to resolve the mistake or misunderstanding, and truly move on, perhaps with a deeper relationship because of the authenticity you showed in handling the misstep. Outside the client engagement, if you're having a hard time moving past this issue, discuss it with your own coach or other support to learn what you can glean from this upset. There may be times when your client can't or won't discuss the issue or holds back forgiveness. This is a moment of truth about the future of your relationship. If they can't (or won't) forgive you, it may be in the client's best interest to be referred to another coach.

In more than 30 years of coaching, I've made my share of mistakes. The concept of continuous learning applies to my coaching clients and to me, and I know every client makes me a better coach. I've probably made a few other mistakes that I didn't even realize.

For example, early in my coaching career, I had a client whose MBTI profile was the opposite of mine. I have a fairly strong J, which means I like to build and finish projects on time. My client was more on the P side, and enjoyed spontaneity and an exploratory approach. Her IDP included getting her doctorate of nursing, and the deadline for application was fast approaching. She had time management as a competency on her IDP, which we revisited each time we met. One day, instead of bringing up the topic for full discussion and planning as I usually did, I let my need for finishing projects on time get the best of me and assigned her as homework the task of applying to the program by the deadline. Not only did she not apply, but she also canceled the next two meetings with me. We were able to discuss that she was avoiding me, because she didn't apply. I owned my mistake, apologized, and fully listened to the impact my mistake had on her. We were able to recover and eventually laugh as we compared our MBTI profiles. She applied for the next deadline—three months later—in her own time and way. This was a lesson I continued to remind myself of as she continued to struggle with papers and other deadlines. But I am relieved to say that by the second year of her herculean degree and our coaching relationship, we had figured out a way for her to make and stick to her own timelines. She finished that doctorate in nursing! And I was so proud (and relieved) at her graduation.

Another example: At the first meeting with a coaching client, I mistook his umbrella for a cane. I was used to the umbrellas that fold and are brightly colored, and this was a long, nonfolding umbrella with a wooden handle. The new coaching client was perplexed, and offended that I would think he was old and needed a cane to get by. He was (fortunately) vocal about this, so we could discuss it. I listened hard and deep. I asked questions, and he relaxed. At the bottom of it, his reaction to my misunderstanding had to do with feeling old and passed by at work. It turns out that he was actually overlooked because of his age, as we learned later. But when the time was right, I apologized. I owned it all. I also mentioned the umbrellas I was used to (without trying to excuse myself), and that it was a lesson to me to look more closely. I inquired about the impact on our relationship. He laughed and said I looked like I felt so bad, how could he not forgive me? We moved on, and into a much deeper relationship than if that hadn't happened in our first meeting.

As an example of being on the receiving end of a mistake, I joined a new gym, and the new membership came with a free session with a fitness coach. I filled out the required intake form, which included my fitness goals. As we were finishing the session, the coach mentioned something like, "And you will be able to lose the weight, no problem." Now, I had not listed or mentioned weight loss as a goal, and I said so to him. He quickly apologized for his assumption, and nervously spluttered that it didn't seem like I would need to lose weight anyway. He then said, "Did I totally eff this up, or is there a chance you would still want to work with me? Because I would like to work with you." I hired him for 10 sessions on the spot. He was a great coach. I remember him more for our banter than his technical skills. He talked about life, encouraged me, and even selected music he knew I'd like. Learning from others' mistakes and forgiving others has freed me up in life and helped me be a better coach.

Key Relational Milestones

The coaching model is bookended by the "getting started" and "client retention" steps. Key relationship competencies are called upon at each step of this four-step process. Underscoring the entire coaching life cycle are three of the relationship superpowers we discussed: beacon of hope, customer focus, and monitoring and building the relationship.

Then, more specific to each step are key relationship competencies, as mapped out in Table 1-1. There will be variations and perhaps additions to the relationship skills most critical for each step. These will be different for each client and per the coach's individual skills and growth. Each step builds upon the prior steps; consequently, the relationship skills build as well.

Table 1-1. Relationship Competency Milestones

Relational Milestones	Relationship Skills
Getting started	• Integrity and trust • Being real • Work-life balance
Step 1: Assessment	• Listening • Micro-monitoring the relationship • Handling negative outlooks
Step 2: Goal setting	• Perspective • Emotional resonance
Step 3: Implementation	• Patience • Handling negative outlooks and emotions • Relational capacity • Handling mistakes • Humor
Step 4: Ending	• Emotional capability to have effective endings
Retention	• Being real
The Superpower Foundations	
• The Superpower Foundations • Beacon of Hope • Customer Focus • Monitoring and Building the Relationship	

When the Client Isn't Coachable

You'll occasionally come across someone who is just not picking up what you're putting down. They're not responding to coaching, and you can sense early in the situation that they're not fully engaged, willing, or able to do the work of competency development. There could be several reasons for this.

First, a client could simply be unwilling to do the work. They may resist doing something new or find little utility in the exercises, reflections, and practices. This situation is best resolved head-on to find out if there is any motivation or meaning you can connect with to spur action and engagement. Sometimes, someone is just uncoachable, but as the beacon of hope, you need to try several interventions to engage them and inspire action before you simply write them off.

Second, a client may not be able to engage with the practices or coaching conversations in a meaningful way. They may have too many competing priorities, like the first weeks of opening a new business line while caring for an aging parent or struggling with their own health condition. There are many aspects to a leader's life, and sometimes the timing is just not right for coaching to be as effective as possible. If this is the circumstance, have an honest conversation about what's going on with your client and decide together if now is the best time for the intense work of coaching.

CLIENT SPOTLIGHT

Too Busy for Homework?

Janelle came to me for executive coaching as part of a leadership academy at her company. In an odd way, being identified as high performing and high potential weakened her motivation—she felt too good to be coached.

She had clear goals in her IDP that were within reach and clearly in her self-interest to attain. The problem was that she did just enough of her homework and assignments to skate by. All executives are super busy, but others in the program managed to find or make time for their homework. Their hearts were in it; they were motivated and engaged at a higher level. I wondered if something was going on behind the scenes that was affecting Janelle's ability to fully engage.

I had a choice: Continue to find tactics for her to make time, or tackle the problem at a deeper level and maybe even risk the relationship. As you might guess, I chose the deeper path. I decided to approach her directly. I asked for her permission to offer an observation. When she agreed, I shared what I was seeing from her and others in the program. And then I was quiet.

Janelle opened up and let me know she had been eyeing another job in another company. We discussed the opportunity and concluded that our work together here, building her competencies toward her leadership goals, would help her in her new job as well. And we cleared out any guilt about her jumping ship from her current company and released any fear she might have been holding in telling me about this other opportunity.

From that day onward, she did every bit of homework and more. She engaged with intention and enthusiasm. To this day, she has continued to grow with the same organization, because they saw even more of her potential when she was fully engaged. And the best news? They promoted her!

The lesson here is that it pays to do homework, and it pays to take relationship risks to go deeper into why a client appears to not be showing up fully.

Third, a client may find it difficult to learn how to do something. Their behaviors may be so deeply ingrained in their family system, culture, educational background, or path to success (to name a few unconscious behavioral anchors) that they can't imagine behaving in any other way. The path of growth being offered by coaching may be asking them to operate in a way very different from what they have done up to this point. This is a beautiful chance to describe to them the opportunities that lie ahead with a broader and deeper set of capabilities, and how learning new skills can only enhance their leadership potential.

Fourth, the environment may not be conducive to supporting the client, the coach, or leadership development in general. Sometimes the organizational support is lacking, which can make it difficult to engage at the fullest level with coaching. This is an opportunity to discuss with your client the realities of their situation and how to navigate those together. This could even turn into a competency to focus on, so they face their challenging climate with more skill going forward.

Lastly, your client may continue to be unaware of their limitations, or they may stubbornly hold on to the idea that whatever negative situation they perceive is someone else's fault. This is another example of what "uncoachable" might look like, but you have many interventions you can engage to try to break through to your client. Take many runs at finding a way into their thought process and determining their motivators.

If, in the end, your actual or potential client refuses to move off their position and remains steadfastly committed to the status quo, it's best to raise this with your client with a recommendation to not start, to pause, or to end the coaching engagement. This will affect your income, but it's best to act from a position of integrity, caring more for your reputation than revenue.

Summary

As you can see, a lot happens in this initial step of getting started. I wanted to include everything, but the main focus is to meet your client and sponsor; understand their goals related to coaching; establish expectations for the coaching program; broker initial agreements, including administrative details and meeting schedules; and complete the initial conversations using the templates as guides. There is a lot of relationship building, establishing trust and rapport, and setting the context for the overall coaching engagement that sets you all up for success. When these goals have been achieved, you've successfully set the context for the coaching engagement and can move on to the first step in the executive coaching model: assessment.

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Nadine Greiner, PhD, is an executive coach with a dual doctorate in organization development and clinical psychology. She has helped more than 1,000 executives and coaches become more effective and fulfilled at work, which has positively rippled out to thousands of their colleagues and transformed their businesses. Recognized for her immense success rate, Nadine has more than 30 years of experience in the field of executive coaching in San Francisco and globally.

In addition to her advanced academic preparation, Nadine has held several high-level positions in privately held and publicly traded companies and served as CEO at the age of 38. This unique combination of psychology, business, and executive leadership makes her a unique and effective coach who produces excellent results for her clients. Nadine speaks and lectures in postgraduate programs globally.

On a personal note, Nadine is dedicated to animal welfare and has fostered, rehabilitated, and trained thousands of cats and dogs. Twenty percent of all her profits go to animals. Nadine stays fit by running after them and by joining the dance party with her friends at Zumba.

All of Nadine's proceeds from this book, and from her previous two books, go to the protection and love of animals.

Becky Davis, MA, is an executive coach, a team facilitator, and a leadership trainer. She has held senior positions in human resources and marketing over her 30-year career, operating at the executive level for market-leading technology and healthcare companies. Her company, Insight Leadership, works with leaders and their teams to achieve excellence individually and in their shared work.

Becky has a master's in business administration with an emphasis in management and organization development and an undergraduate degree in organizational and leadership communications. She is a certified senior professional career coach and integral coach. She is also certified in the Hogan Leadership, DiSC, Myers-Briggs, and Enneagram assessments.

With insight and global experience from more than 30 years in leadership roles, Becky consults on team effectiveness, talent management, organizational change, and strategy. She coaches executives and senior leaders, partnering to explore new possibilities to create more of the outcomes they desire, personally and professionally. She has a long history of leading through kindness and compassion, investing personally in others, and creating community.

To support the greater Sacramento community, Becky will donate proceeds from the sale of this book to nonprofits addressing food and housing insecurity, two issues Becky is personally passionate about improving.

About ATD

The Association for Talent Development (ATD) is the world's largest association dedicated to those who develop talent in organizations. Serving a global community of members, customers, and international business partners in more than 100 countries, ATD champions the importance of learning and training by setting standards for the talent development profession.

Our customers and members work in public and private organizations in every industry sector. Since ATD was founded in 1943, the talent development field has expanded significantly to meet the needs of global businesses and emerging industries. Through the Talent Development Capability Model, education courses, certifications and credentials, memberships, industry-leading events, research, and publications, we help talent development professionals build their personal, professional, and organizational capabilities to meet new business demands with maximum impact and effectiveness.

One of the cornerstones of ATD's intellectual foundation, ATD Press offers insightful and practical information on talent development, training, and professional growth. ATD Press publications are written by industry thought leaders and offer anyone who works with adult learners the best practices, academic theory, and guidance necessary to move the profession forward.

We invite you to join our community. Learn more at **TD.org**