



## **Risks in Executive Coaching and How to Minimize Them**

**By Ben Dattner, Ph.D.**

Executive coaching is an increasingly popular method of assessing and developing high performing and high potential leaders. When coaching is provided in the right way, at the right time, by the right coach, to the right leader, the return on investment in coaching can be very high. However, providing the wrong coaching to the wrong person at the wrong time for the wrong reason can be a waste of the organization's focus and resources as well as a harmful distraction from other challenges that need to be addressed.

Here are some potential risks of executive coaching, and some suggestions for how to minimize those risks:

### **Client selection:**

Sometimes, coaching is not the best intervention for a potential client (sometimes referred to as the "coachee"). It's important that the organization take an open minded view that the potential client's challenges may be a "presenting problem" that reflects deeper organizational issues. Beware investing in coaching for an individual if there are other factors that need to be addressed first. For example, if there are larger challenges in the organization, in the potential client's department, or on his or her team, it may make sense to first try to address those challenges. If roles and responsibilities are unclear or if there are negative departmental or team dynamics, then responsibility charting, conflict resolution, or team facilitation may be more relevant approaches than coaching.

Even independent of larger organizational issues, there are other situations in which coaching is not likely to be successful. Coaching should only be used for high performing and/or high potential clients, and should not be used as a remedial exercise for underperforming executives. In some cases, there is pessimism that the potential client can succeed in a role, and coaching is used as a last-ditch effort to turn around performance. This rarely works. In most cases where a leader is facing serious challenges, it's better to redefine the leader's role or to move the leader out of the role than to go through the exercise of coaching. Executive coaching also may not make sense if the potential client has technical, skill, or knowledge gaps, in which case training or mentoring are more likely to add value than coaching. In some cases, once a client has come up the learning curve in terms of substantive knowledge, only then will he or she be ready for coaching. In some rare cases, the client has personal challenges and could benefit more from psychotherapy or counseling than coaching until these challenges have been resolved.

### **Coach selection:**

Coaching is still an unregulated and fragmented industry. The wrong coaches can do more harm than good by influencing clients in counter-productive ways or by making dysfunctional organizational, departmental, or team politics worse. Coaches should be thoroughly screened for appropriate educational preparation and training credentials. The organization should verify that the coach has relevant business or client experience and knowledge, and this can be accomplished through reference checks at similar organizations or for clients with similar challenges or opportunities. Internet searches for coach publications, websites, affiliations and professional networks can also be helpful for HR to thoroughly vet coach credentials and competence.

### **Client and coach matching:**

For coaching to be successful, there needs to be good interpersonal chemistry between client and coach. If a client is matched with the wrong coach, the engagement is much less likely to be successful and may end prematurely. In order to optimize client and coach matching, HR can create a database of coaches that includes both substantive and stylistic matching criteria. Once the initial screen is made, it is a best practice to give clients a choice of coach, and arrange several in-person informational meetings with potential coaches so that the client can choose his or her coach from the list presented. Not only does this help ensure that the client will be comfortable working with the coach, it also ensures that the client takes more ownership of the process and is therefore more accountable for making progress.

### **Goal alignment:**

There are four participants in most coaching engagements: coach, client, manager, and HR. If there is misalignment of goals and expectations at the front end of the coaching that are not addressed, the engagement is not likely to succeed. In productive coaching engagements, everyone is clear about what the general and specific goals of the coaching are, as well as how they align with larger team, departmental, and organizational goals and initiatives. In terms of expectations, there needs to be agreement about timing and duration of the coaching, as well as a clear understanding of, and agreement about, confidentiality on the part of all parties.

### **Confidentiality:**

For coaching to work well, there needs to be a balance between confidentiality and sharing of information. On one hand, if there is too little confidentiality, the client and feedback providers won't trust in the process and won't be fully and open and candid. On the other hand, if there is too much confidentiality, it's hard to hold the client accountable for progress. Therefore, feedback from any personality assessments, 360 degree feedback surveys or interviews should generally be confidential, but a summary of key themes and the development plan based on the information that is collected should usually be shared with the manager and HR.

### **Defining the coach's role:**

For a variety of reasons, there are often temptations for coaches to overstep the boundaries of their role. Coaches should not play the roles of: Evaluator, because this compromises trust in the process and discourages client from being fully open; Messenger, because conveying messages back and forth is the role of a mediator, not a coach; or Advocate, because coaches should not get involved in organizational politics or make arguments on behalf of clients. Coaches should instead strive to be as neutral and supportive as possible, simultaneously building trust with the client, while keeping in mind that the coaching is an investment by the organization intended to yield benefits for both the organization and the client.

### **Accountability:**

In too many coaching engagements, the client is not held appropriately accountable for learning from, and acting upon, the feedback and insights gained in the coaching. When coaching is most successful, all four participants should be accountable for outcomes. For the client, accountability should include the extent to which the development plan has been successfully implemented; for the coach, accountability should be for the value he or she added to the client and the organization in achieving the agreed-upon coaching goals; for the manager, accountability should encompass supporting the client in putting insights into action; and for HR, there should be accountability for sourcing and evaluating coaches, upgrading coach talent, and applying coaching process and content best practices across the organization.

## **Follow up:**

Finally, in too many coaching engagements, there is little to no follow up and the short term benefits of coaching are not fully realized over the longer term. In order to maximize the value of coaching, follow up should be built in from the very outset of the coaching. Follow up meetings to support progress should be scheduled 3 to 6 months after the conclusion of the engagement, and if 360 feedback was part of the coaching, there should be a re-survey by the coach and benchmarking of progress after 6 months or a year. For the organization, follow up should include the evaluation of coach performance by surveying the client, supervisor and HR to ascertain how well the coach did, if he or she should be deployed again in the future, and if so, for what kinds of potential clients. Lastly, follow up for the organization should include the application of lessons from each coaching engagement to subsequent ones in terms of goals, expectations, and logistics. Some HR leaders find it helpful to convene their external coaches to collectively discuss the impact of organizational challenges and opportunities on their respective coaching engagements, as well as general lessons learned from working with their individual clients.

## **Conclusion:**

Coaching is all about assessment and development, and ideally, not only the client but also the organization should learn and develop through the coaching process. By assessing each of the stages of coaching described above, the organization can minimize risks and achieve a higher return on investment by evaluating and improving how clients and coaches are selected and matched, how goals and expectations are aligned, how confidentiality is defined and safeguarded, how the coach's role is bounded, and how accountability and follow up can best be built into each coaching engagement.



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