

Dattner Consulting, LLC

# The Executive Coaching Process

# Executive Coaching

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- Goals
- Preparation
- Assessment
- Development planning
- Implementation
- Evaluation
- Follow up

# General goals:

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- Coaching should be aligned with other training and development programs in support of business goals
- Coaching should be viewed positively as an investment by the organization rather than as a remedial exercise
- Client should develop a better understanding of strengths and developmental needs
- Client should use this understanding to create, implement and refine strategies for improved performance

# Specific goals:

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- Goals
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- Evaluating strengths and development areas more accurately
- Cultivating self awareness, self control and social influence
- Sharing credit and accepting more accountability
- Improving leadership and management style
- Enhancing communication, collaboration and diplomacy
- Reducing conflict and creating a more positive organizational culture
- Navigating organizational politics and priorities more effectively
- Advocating with greater impact for resources, information and support

# Specific goals (continued):

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- Managing workload, pressure and priorities more effectively
- Preparing for a promotion to a higher level of responsibility
- Building confidence, executive presence and presentation skills
- Increasing team alignment, commitment and cohesion
- Boosting employee motivation, engagement and retention
- Holding staff more accountable and driving better bottom line results
- Developing ability to assess, manage, empower and mentor others

# Specific goals (continued):

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## Executive coaches can assist by:

- Helping talented individual contributors develop management skills
- Acting as a “personal trainer” for professional development
- Soliciting clear feedback and expectations from manager and others
- “Softening the blow” of tough feedback or unfavorable outcomes
- Facilitating constructive dialogue about feedback or results
- Serving as a caring and supportive listener, making clients feel heard
- Enabling organizations to retain and motivate “high potentials”
- Assisting client with current role and in preparing for future roles

# Preparation:

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- Meeting of coach and client's manager and/or HR to define goals and process for the coaching engagement
- Meeting of coach and client where the coach explains his or her approach to coaching and to confidentiality
- Development of a consensus between the manager, client and coach on the goals and logistics of the coaching engagement
- Distribution of assessment surveys and/or scheduling of 360 degree assessment interviews

# Assessment:

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- Personality assessments, e.g. Hogan, Myers-Briggs, etc.
  - Confidential 360-degree feedback
  - Interviews by coach of client's supervisor, peers and direct reports or other stakeholders
  - Exploration by client and coach of:
    - Career history and motivators
    - Work preferences and style
    - Role challenges and opportunities
    - Professional and learning goals
- Goals
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# Development planning:

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After condensing the assessment into three to five key themes, client and coach collaboratively create:

- Plans for leveraging strengths and addressing areas for development
- Performance goals
- Learning goals
- Managerial style goals
- Professional development goals

# Implementation:

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After sharing and discussion of the development plan:

- Client implements new strategies and tactics
- Client and coach discuss progress on an ongoing basis

# Evaluation:

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Client and coach evaluate success by utilizing:

- 360-degree feedback
- Meeting with manager
- Follow-up discussions with peers and direct reports

# Follow up:

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Client and coach reconvene after 3 to 6 months to gauge progress:

- Additional input can be gathered from others if necessary
- Development plan can be modified as new challenges and opportunities emerge

## Executive Coaching Links:

[Ben Dattner executive coach biography](#)

[Harvard Business Review: "How to participate in your employee's coaching"](#)

[HR.com: "Three roles that executive coaches should avoid"](#)

[Forbes: "How to use 360-degree feedback for executive coaching"](#)

[Dattner Consulting's Leadership 360-degree feedback survey](#)

[Additional coaching information and resources](#)

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