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## Why you should find this handbook useful

We have written this handbook as a guide for those who may be interested in being coached themselves and for people who are looking at the option of coaching for others.

When can coaching be of value? There are a number of situations including:

- When someone is taking on, or aspiring to, a new role and new challenges through promotion or a change in responsibilities such as taking charge of a business group or function
- If building and leading high performance teams becomes a key element of an individual's job – in short they need to be a coach to their team
- When steering a business or organisation through significant change is the priority for someone in a leadership role
- For new or existing teams that need to work well and achieve results together
- If creating a learning and coaching culture is required across an organisation

We have seen some businesses succeed in using coaching effectively and developing a high performance coaching culture. Others find this difficult. There can be confusion over:

- Exactly what coaching is
- How best to manage the various stakeholders in coaching
- When coaching is, and is not, an appropriate intervention
- How to work effectively with an increasingly complex and fragmented coaching industry

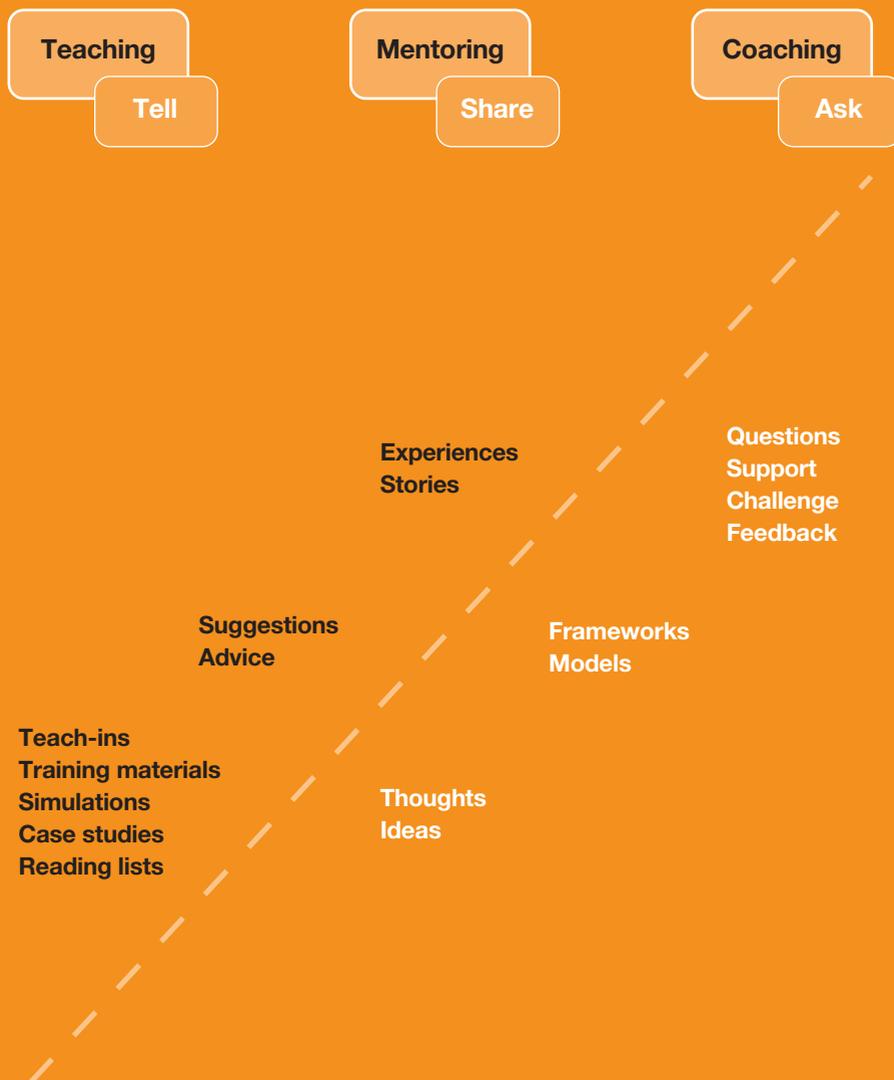
So this handbook:

- Demystifies what coaching is about
- Gives guidance on how to set up effective coaching programmes
- Explains how to find and select good coaches
- Provides tips on how to gain the best value from coaching

Whether you are an individual interested in coaching, the business leader, head of HR or other potential user or buyer of coaching, we hope you'll find something useful in the following pages.

On the assumption that you do (or even if you don't!), Sherwood would be delighted to hear from you.

## 'Teaching - Mentoring - Coaching' Spectrum



## What is coaching? What is its purpose?

To answer the second question first – effective coaching enables people to maximise their potential and perform to the very best of their ability. Coaching is designed to be of benefit to the individual and to the organisation in which they work. In fact one of the building blocks to a successful coaching relationship (between the individual, coach and organisation) is an agreed vision of what all the people involved want to achieve.

A typical coaching session is a one-to-one discussion over a period of one to two hours. It can be preceded by a telephone conversation to establish the purpose and/or key points that will be addressed and to see if there is any preparatory work that either the coach or individual should do. Afterwards there may be a follow-up telephone call to review progress. If a face to face meeting is impractical, a coaching session can take the form of a telephone conversation once the coach and individual have established a good working relationship.

Depending on the circumstances behind the decision to engage in coaching, there will usually be a series of meetings or, more unusually, a single, one-off session as appropriate.

The role of the coach is to work with an individual so that they

- Increase their professional self-awareness in terms of their work, their role, how they currently approach it and their underlying motivation
- Identify what is going well and what is not, understand the causes and what therefore would help them perform at a higher level
- Take responsibility for making any appropriate changes that will enable them to perform at that higher level – what do they need to stop, start or carry on doing or do differently
- Sustain and/or improve personal and business performance

The style of the coach will generally be “non-directive”. The coach is not there as a trainer or expert adviser telling the individual what to do. So in a coaching meeting the coach will spend a lot of time asking questions that help (and even force) the individual to think about their work and working relationships in a deeper way than they have, or have had the opportunity to do, in the past.

In this context what a coach needs to be good at is

- Prompting the appropriate self-reflection on the part of the individual, for instance by asking the appropriate question at the optimal moment
- Listening in an attentive and open minded way
- Encouraging and helping the individual to develop their own goals, ideas, options and plans
- Challenging where necessary to test assumptions, clarify thinking and if required, to hold an individual to account for what they commit to doing

The end point of a coaching session will usually be a practical plan for specific action to which the individual is committed: something concrete – not just a vague feeling of well-being.

It is helpful to distinguish between coaching and mentoring. When mentoring the coach/mentor brings some sector and/or role specific knowledge – i.e. in relation to the individual they have “been there, seen it, done it” too. Of course coaching and mentoring can overlap – with powerful results. External coaches, like those in Sherwood, may have particular sector or role experience that provides credibility and can be a source of useful insights

### Case study 1

A senior manager X was being coached on aspects of leadership as part of a 'high performance leadership development programme'; his 'line manager' subsequently told the coach (but was unwilling to tell X until persuaded otherwise) that the promotion of X to office head was contingent on demonstrating a willingness to be more consultative in his approach to decision-making. A round table meeting resulted in much clearer understanding of the purpose of the coaching, and, unsurprisingly, more commitment and change of approach from X. The lesson for the coach was to probe more carefully at the start of assignments that are presented as part of the 'normal development programme' for other senior managers in the firm!

### Case study 2

A partner Y had been offered coaching to help her build a new practice following a strategic decision by the firm to move out of her specialist area and to increase market share in another relatively new specialist segment of the same market. At the initial 'chemistry' meeting, it became obvious that one option Y wanted to explore was leaving the firm and doing something completely different. Having got clearance from the firm that there were no 'off limits' topics for the coaching, Y explored all options and eventually decided to stay and build the new area (with the aid of a realistic timescale and resourcing plan developed in the coaching sessions and agreed by the firm). In a similar case, the outcome was that the partner left the firm and went to a competitor having negotiated an exit that left everyone feeling good about the result.

### Case study 3

A senior executive Z who was on track for promotion was offered coaching to help him find a way of increasing his visibility within the organisation and to tackle some negative perceptions (amongst people who did not know him well) about his 'gravitas'. The HR director made it clear to the coach that the main objective was to help Z develop and that promotion in the current year was unlikely because of these personal attributes rather than for lack of a business case. It rapidly became clear that Z had not been told (or had not taken on board) this message and so wanted to focus on creating his business plan. A round table meeting with sponsoring department head, the HRD manager, the coach and Z resolved the confusion and helped to refocus Z on successfully tackling the behavioural and reputational issues (as well as doing his business plan).

## When is coaching appropriate?

Here are some specific examples:

- An established leader seeking to implement change and/or facing difficult decisions who wants an independent and confidential sounding board
- Following (or in preparing for) promotion someone wants to understand and meet new expectations - e.g. becoming a partner or board member or working in a new environment
- There is the requirement to get to grips with a new role following a lateral career move e.g. to chief executive, head of department or senior manager. This could involve support through "the first 100 days"
- When developing new skills, especially interpersonal skills, is a priority. For example for running team meetings, holding important one-to-one conversations or appraisals and managing conflict. Many otherwise confident and experienced professionals can struggle when strong emotions (their own or others) surface and have to be addressed
- When a new team is created or an existing team is given a new task, they may need to explore how to work together most effectively
- A high performing professional who is interested to explore motivation and to find the next big challenge
- An individual needs to prepare for a specific challenge – e.g. putting together a business case, presenting to a new client, speaking at a conference, taking part in a selection day for promotion

In each of these situations coaching offers tailored support that can accelerate the individual's (or team's) learning, effectiveness and development. The focus is on helping people raise and maintain their game.

In addition many firms are now actively encouraging the use of internal mentors – experienced colleagues who are willing to guide and support the learning and development of others in the firm. This can be a powerful and cost-effective way of developing key individuals while passing on the culture and values of the firm in question – your way of doing things. These internal mentors may themselves benefit from coaching and understanding the benefits of using a coaching style.

An external coach who has some shared experience with the individual (e.g. been a partner or senior manager in a law firm or similar business), may be able to combine the benefits of coaching and mentoring.

And when is coaching (at least on its own) not appropriate? When what the person really needs is:

- Technical training
- Effective line management
- Therapy or counselling (responsible business coaches should not stray into areas where they are not qualified to help – though they can act as a catalyst for a client who needs this to seek appropriate support elsewhere)

Finally, effective coaching is built on the assumption (which may need testing) that the individual is a volunteer and has the physical and psychological energy to set and work towards challenging goals.

## What people have said about coaching by Sherwood

From a senior executive faced with integrating a local merger and adjusting to a major restructuring of the whole business:

It's extraordinary ..... you never actually tell me anything and yet after an hour or so talking to [my coach] I know exactly what I need to do next.

From a newly promoted partner as part of her induction process:

I found working with Sherwood inspirational. It gave me practical and workable insights into how a partnership is run, how to plan strategically and how to manage and run a team. The process has really made me think outside the box.

After one session with a senior manager torn between his current successful career and other ambitions he has for his life:

I'm enormously grateful. It was immensely illuminating. Amazing that a 1½ hour session could have such an impact. It crystallised my thinking. I've realised I've got time – I don't need to do it today. I can concentrate on what I'm doing now. I feel a lot better; I've stopped beating myself up about it.

From a training manager dealing with a difficult person in their team:

[My coach's] assistance and analogies has been hugely enlightening, as have all four sessions with her. It has been the most amazing privilege to be helped by her and will not be forgotten. I have recently accepted some requests to mentor others and am very mindful of [my coach's] superlative coaching skills and techniques – and am tentatively endeavouring to emulate them.

From the owner of a business who knew he needed to do something to improve performance but didn't know what:

I've transformed the business over the last 12 months and couldn't have done it without the coaching sessions. You helped me see clearly and decide where I wanted to take the business and how. Now we are well on the way. Thank you.

## How to find the right coach

There are four options:

- Outside coaching specialists
- Senior managers in leadership roles, such as CEO's and COO's, department heads or practice group leaders
- Other senior managers in the business from completely different areas of work from the relevant individual who are naturally good coaches and part of an internal coaching support network
- Senior support professionals, such as the Business Development or Human Resources directors

Here are the pros and cons of each option

### Outside coaching specialists

These people will have the appropriate coaching skills – of asking good questions, listening well and helping people take responsibility. They will not bring assumptions or baggage or personal agendas into the relationship with the individual. They can be objective and see or raise issues that have not been apparent to people within the organisation.

The confidential nature of the coaching relationship enables trust to be established which may not be possible where there is an expectation of internal reporting back. The individual may therefore be prepared to talk about issues (whether ambitions or perceived weaknesses) that they would keep back from someone within the organisation.

Outside coaches, however, may not understand the culture of the organisation or the realities of the working life of your people – or at least that may be the perception of the individual. Having sector specific knowledge can bridge this potential credibility gap, but is not essential. Lack of sector specific knowledge can sometimes be a benefit to help challenge norms of performance or expectations.

### Senior managers in leadership roles (i.e. the boss)

This person may be the obvious candidate to undertake a coaching role – they know the person and the circumstances. What they may lack are the skills, the inclination and, importantly, the time.

Some senior managers will be able to adopt an effective coaching style and still be a demanding boss who, for example, carries out performance appraisals. Others will find it difficult to combine these approaches. In addition, exceptional sector specific expertise can get in the way of an effective coaching relationship. The "expert" may feel more comfortable addressing issues of technical competence but this may be missing the point.

### Other senior managers or partners (i.e. peers)

Some of the best coaches can be within the organisation but not be technical experts in the same field as the person being coached. An interesting experiment was carried out in the sports world that showed that there were certain circumstances in which ski coaches performed better than tennis coaches at coaching tennis! This was because the ski instructors were forced to focus more on listening to and understanding the person they were working with, rather than focussing on the correct technique. This is the so-called “inner game” in which the opponent in tennis or barrier to top performance in golf was the voice inside one’s head saying what one must, should or ought to do rather than the person on the other side of the net or the difficulty of the golf shot! The senior manager from another department who is not going to tell the individual how to do their job and is not going to carry out their next appraisal may get a better reception than the boss.

Using senior managers in this role will entail finding people with some natural aptitude and a willingness to learn more about coaching. Then it will be a matter of finding or creating opportunities for them to practise.

This approach can create a group of people with credibility who have a positive impact on the performance of others and at the same time maybe break down unhealthy divisions between teams or departments. We usually find that acquiring coaching skills makes people more effective in leading and managing their own people as part of the ‘day job’ as well.

### Business services professionals

Coaching by senior business services or support professionals (who are not formally trained coaches) can be very effective within their area of responsibility e.g. on running pitches from a BD director or developing better team working from an HR director.

A qualified professional may prefer the opportunity of a one-to-one conversation rather than going on a traditional training programme which may be seen as the “remedial” option. Again it will be a question of the business support person having the appropriate style and skills and time.

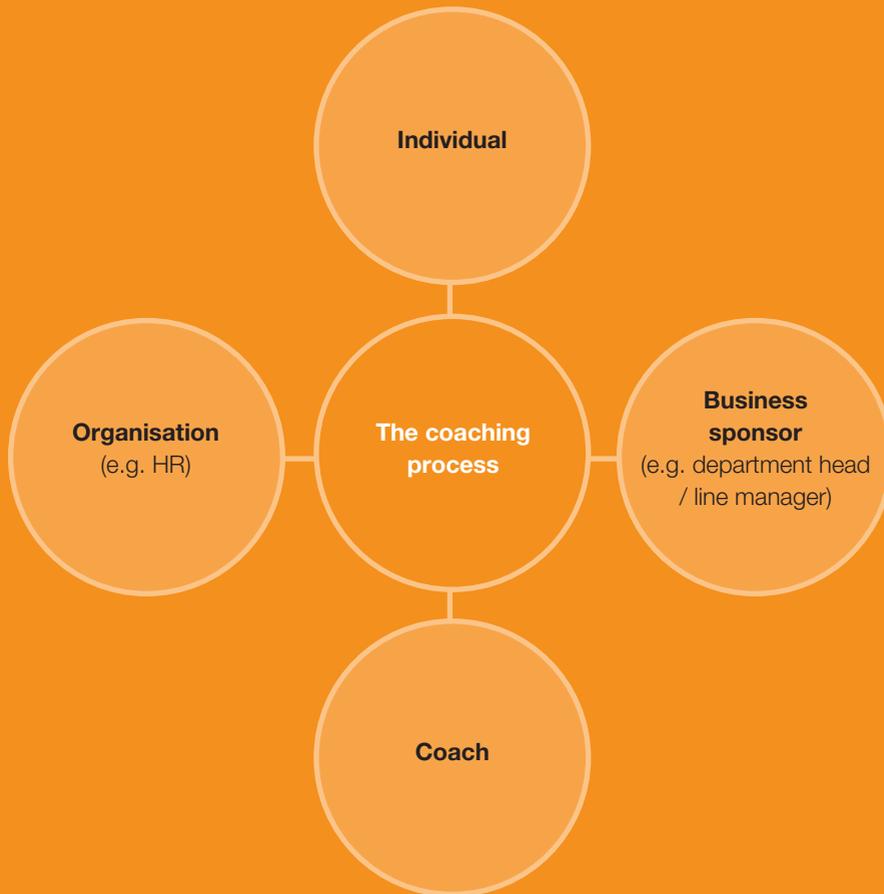
In fact some organisations are now investing in coaching training for their senior business services professionals and recognising that coaching is a key part of their role.

## Meyler Campbell’s ten tough questions to ask potential coaching providers

- 1 What style of coaching do you use and why?  
How do you distinguish between coaching, counselling and mentoring?
- 2 Where were you trained?  
How many of your associates have formal training in coaching and where were you / they accredited?  
Tell me about your breadth of experience  
What other relevant formal qualifications do you / your associates have?  
What professional memberships do you / your associates have?
- 3 What ongoing professional development do you / your associates undertake?
- 4 Tell me about a coaching “success story”  
When has your coaching failed?
- 5 How do you monitor the individual and organisational impact of your coaching performance?  
How do you evaluate your coaching?  
What reporting methods do you use?
- 6 What support and monitoring systems do you have for yourself?  
Who coaches you / your associates?  
Who supervises you / your associates?
- 7 Tell me in what situation you would not coach  
Are there any individuals you would not coach, and how do you identify them?
- 8 Tell me about your availability to a coaching client  
Where does your coaching occur?
- 9 Who can I speak to about your coaching?
- 10 May I ask what led you to choose to work as a coach?

(Reprinted courtesy of Meyler Campbell – leading providers of coaching training)  
See [www.meylercambell.com](http://www.meylercambell.com)

## The stakeholders in the coaching process



## The coaching process: getting the coaching contract right

It is important that both the individual and the sponsoring organisation invest sufficient time at the start of the coaching process to ask questions such as:

### 1 What exactly is the coaching for?

What is it intended to help the individual to do (differently) or to achieve?

We encourage sponsoring clients (where it is appropriate) to set performance objectives (within the control of the individual) rather than simply outcome objectives (which may be influenced by external factors). This distinction between input by the individual (e.g. keeping in contact with key clients between transactions) and outputs (e.g. getting two new transactions from a key client) is important and can help move the coaching towards practical action planning rather than creating unrealistic wish-lists. Sometimes it takes one or more coaching sessions to get clarity on this important question. Sometimes getting such clarity is the very purpose of the coaching.

### 2 How and by whom will success be assessed (and over what period)?

What evidence can and should be collected, when and by whom?

Answers range widely from – ‘the individual client will assess utility and progress for himself’, through to ‘we want a comprehensive before and after 360° feedback process’.

### 3 Are there any parameters/limits to what the coaching can address?

For example, is it appropriate to spend time talking about alternative career paths with a manager or associate who is being groomed for internal promotion or to a senior executive or partner who is being asked to change to focus of his/her role to fit the firm’s new strategy?

### 4 What if any are the limits to the confidentiality obligation as between individual client and coach?

We start from the basis that it is absolute, but there may be some legitimate exceptions.

### 5 Who reports back to whom and on what?

We prefer limiting our role to reporting on number and duration of coaching sessions, with the individual client doing the rest.

### 6 What information/feedback will be given to the coach about the individual and/or the relevant business context and can all of it be shared?

We recommend complete transparency but again there may be a few legitimate exceptions to this.

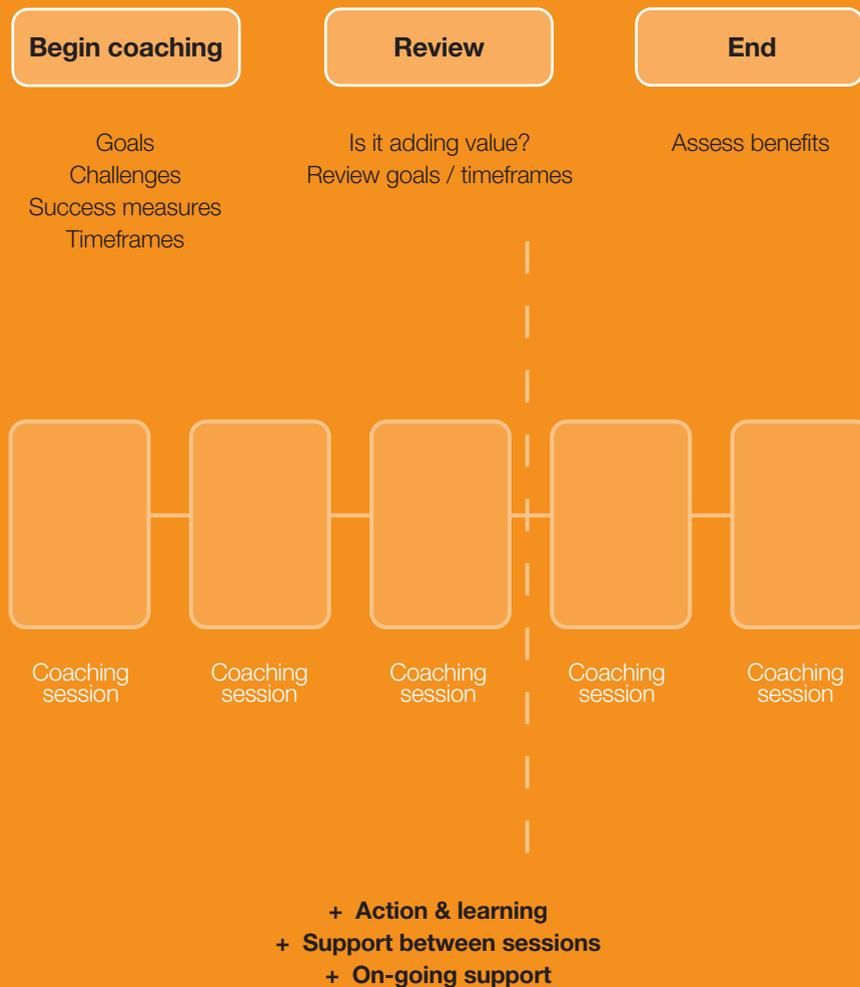
### 7 Can the coach talk to others within the firm or outside, such as clients?

For example, to gather feedback on perceptions of the individual client – if so, what can they say about the individual and the purpose of the coaching?

There are also the straightforward questions about how many sessions, payment and cancellation terms, the minimum/maximum budget available, timescale for an interim review, and other logistics to be clarified.

Getting the contract right from the outset is an essential element in getting value from coaching. This is addressed in more detail in the section on “How to get value from coaching”.

## An indicative coaching programme



## The coaching process: what does a coaching “programme” look like?

We are often asked this question. Coaching is meant to be a flexible tool so there will not be a “one-size fits” all way of describing a coaching programme. But both the individual and firm contemplating the use of coaching for the first time legitimately wants some guidelines or parameters.

Structure (of the sessions) follows purpose - or should do.

So coaching for:

- a one-off event (e.g. a pitch, promotion selection board, interview)
  - probably a one-off session
- transition into a new role
  - probably monthly sessions over a six month period
- change in behavioural style
  - probably four to six sessions with some “front-loading” and then longer gaps between later sessions
- ongoing support in a coaching and/or mentoring capacity
  - probably on an ad-hoc basis after two or three initial meetings

Except for the one-off event, it will often take a couple of meetings to establish the best structure for the individual. So if there was a rule of thumb for an organisation that wanted a predictable and consistent format it would be – chemistry meeting (for individual and coach to meet, discuss the concept and practicalities of the proposed coaching and see if there is the necessary rapport at an individual level then three sessions, then review, then two / three further sessions and final review. But above all, the structure of a coaching relationship needs to be flexible to meet the needs of the particular circumstances and people.

## Checking progress and value

The individual might ask:

“Is this being helpful?”

“Am I getting more clarity on what needs to happen?”

“Do I feel more confident about taking this on?”

The business sponsor (e.g. department head) and organisation (e.g. HR) might ask:

“Are we seeing the individual wanting to take action?”

“Do they seem more confident?”

“Are we seeing a change in behaviour?”

The coach might usefully consider:

“Does the individual seem to be engaged?”

“Are they taking actions forward?”

“Am I the right person to be coaching this individual?”  
(i.e. “Do I know somebody better suited?”)

## How to get value from coaching

Given the confidential nature of the relationship between coach and individual, there can obviously be some issues for the budget-holder as to how to ensure that the organisation gets value for money from the investment. In some coaching relationships – perhaps those involving the most senior people - it will be a matter of trust that the coach and individual are doing useful and effective work and the sponsoring organisation will be happy to take a step back. In fact this may be very important (even imperative) to some individuals being coached. In other cases the business will want closer involvement in monitoring the outputs and results of the coaching and the individual being coached will readily welcome this. Bearing in mind the need for flexibility, here are some possible approaches if a more rigorous approach is appropriate:

### 1 Ensure the coaching is aligned to business needs.

A 3 or 4 - way discussion at the outset can ensure there is alignment between:

- Individual
- Coach
- Organisation / budget-holder (e.g. HR)
- Business sponsor (e.g. head of department or senior manager)

Although the individual and the coach will be the people physically at a coaching session, the interests of these three/four parties need to be taken into account. Areas that might be relevant for such briefings might include, for example:

- Strategic objectives of the business or the relevant part of it
- Culture and values to be reinforced
- Leadership behaviours expected (and currently being displayed)

Agree measurable objectives at the outset such as, write a business plan by [date], and establish a clear evaluation process.

Evaluation should start from the moment the coaching begins. Increasingly organisations are using three/four-way contracting as above for coaching interventions to clarify the organisation's desired outcomes and success measures.

Sometimes senior leaders want to use extended external coaching as a stimulus to deeper reflection about the firm or their role or as a catalyst to thinking “outside the box”. In such a case it might be difficult to identify specific outputs, although “generating more imaginative ideas about the future of the firm / how we should tackle X”, might fit the bill in such a case. In any event there needs to be some substantive answer to the question “why is this coaching happening?” so that it is not, in effect, just a perk or a status symbol.

- 3 **Set a budget** of, say, three meetings and have a review before proceeding with any further coaching
- 4 **Encourage all the stakeholders to consider continuously if progress is being made.**  
See earlier for useful questions to be asking
- 5 **HR (or L&D) and the business sponsor might provide on-going support to the individual between coaching sessions.** These meetings will encourage communication from the individual about how the coaching is going.
- 6 **The individual could provide updates on progress to the budget-holder or business sponsor.**  
We do not advocate that the coach provide this report, as it risks compromising the important boundary of trust between the individual and the coach.
- 7 **Harvest the learning from coaching.** Through the coaching process, coaches develop a deep understanding of the firm's leadership behaviour and culture. Panellists at a CIPD's Coaching at Work Conference agreed it is acceptable to harvest data from coaches on organisational themes. This needs to be done with due concern for the individual's confidentiality and it must be for constructive organisational feedback and never for punitive measures.

In our experience, it can be helpful for HR departments to bring external and internal coaches together to identify and document organisational themes that have emerged from their coaching. This is especially so if aspects of the organisation, its policies or practices, may be inhibiting the behaviour it wants leaders or others to demonstrate

## ...and finally

Yes, we would like you to consider Sherwood when you are choosing potential coaches or mentors or wanting to develop your own coaches.

We are very happy to talk to businesses well before there is any actual coaching to do. Organisations often feel they need help at the stage when the board or senior managers are asking "what exactly is coaching?", "what is mentoring?" and "how is it different from what we do already via training?" We can assist in the process of building credibility and confidence in the coaching process. We can also help businesses to develop an approach to identifying and working with internal and external coaches that will best suit their needs – eg by setting up a coaching faculty.

A vital first step in creating any specific successful individual coaching relationship is the chemistry meeting between individual and potential coach. We are always willing to invest time in these meetings.

The Sherwood coaches hold relevant, recognised coaching qualifications – and have extensive practical experience. That experience covers both the skills of coaching and the culture of a range of large and small businesses and organisations. We have worked in law firms, barristers' chambers, other professional service firms, the health sector, schools, colleges and universities, professional football clubs and voluntary organisations.

Please get in touch – and if you do, thank you.

## The Sherwood coaching team



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