

Possibilities and Pitfalls of Internal Executive Coaching

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In today's difficult economic climate, companies need to use executive coaches to support managers and leaders adapting to change, leading transitions, and coping with unexpected challenges more than ever. At the same time, companies are also expected to provide coaching services in support of managerial training, 360-degree feedback interpretations, leadership development processes, and the individual development planning components that frequently accompany these interventions.

In responding to these demands within budgetary limitations, HR departments are identifying a growing number of important coaching services that can be provided by professionals already inside their ranks. Many professionals in Learning & Development, Human Resources, Organizational Development and other areas, already employ skills that are useful in coaching. However, when tapped to provide more formal coaching, new skills become important, such as effectively managing the engagement, dealing with the client's manager, goal setting, obtaining input from others, evolving a development plan, and maintaining confidentiality. As a result, organizations typically train professionals, who want to provide internal coaching, to develop their competencies and confidence to provide effective internal coaching.

The existence of a high-quality internal executive coaching capability benefits and complements external coaching and helps address cost containment pressures while benefiting the organization

and its talent. Although internal coaching is unlikely be applied to every coaching need, it is a robust offshoot of the coaching world and continues to grow. ¹

With its growth, internal coaching activities have expanded to cover engagements more traditionally covered by external coaches and may include on-boarding or transition coaching, individual development planning, and development through action learning projects. In organizations where internal coaching has established practitioners, those internal coaches also may take on longer coaching assignments formerly handled by exclusively by external coaches.

The more experience companies have with internal coaching, the more they find similarities between external and internal coaches:

- Effective internal coaches need to have the same sensibilities and competencies as external coaches.
- With some adjustments to contracting and coaching boundaries, well-conceived coaching methods and processes apply equally to external and internal engagements.
- All coaching, both internal and external, requires clear contracting so that all parties understand the parameters of the engagement, whether it is a two-hour feedback coaching session or a three-month coaching engagement.

¹ In this article we deliberately focus on the formal processes of internal executive coaching, as distinct from managerial coaching as with manager and direct report. While managerial coaching plays a critical part in organizations and many of the coaching skills and sensibilities do overlap, we are referring to a formally contracted coaching process that is outside of the organizational reporting structure. Managerial and executive coaching are distinct developmental opportunities that can occur in parallel.

- Policies and procedures that address confidentiality and record keeping need to be vetted and in place.
- Besides clarity of roles and boundaries there needs to be a resource with which to discuss any conflicts of interest that may emerge between coaching and other role functions.
- Just as with external coaching and presuming there are several internal coaches, it is helpful to have an awareness of the internal coach's approach to coaching to facilitate effective matching with clients.

While there may be similarities among external and internal coaching requirements, there are differences as well. External coaches work more frequently with senior executives but internal coaches are more likely to have a wider scope of coaching engagements in both type and organizational level. As a result, the clients of internal coaches are often earlier in their careers and often benefit from a coaching focus on managerial skill building. This requires that internal coaches be especially well versed in a wide range of managerial topics. Often internal coaches will draw from concepts and models used in the organization's management training programs. In fact, this type of engagement may be formalized when, for example, internal coaches are assigned to follow up with clients who have participated in a management or leadership training program.

Internal coaching engagements are often shorter and more targeted than those of external coaches. They may contain a specific number of sessions or a tangible deliverable, such as helping an employee interpret the results a 360-degree survey, drafting a vigorous individual development plan, or preparing for a presentation. Also, internal coaching often leverages

knowledge of the organization, its culture, and its key leaders for on-boarding and internal transition engagements.

In order to capitalize on the benefits of internal coaching, potential pitfalls are best addressed in advance. These include:

- Balancing multiple roles
- Attunement to conflicts of interest
- Managing multiple relationships
- Attending to confidentiality
- Listening objectively
- Abstaining from certain decisions
- Managing relationship boundaries

Internal coaches have to manage time carefully to be available for their clients as well as being accountable for other HR/OD/L&D functions. Finding the balance between coaching and other responsibilities can be daunting.

Also, the coach's multiple roles may intersect in many places and can be perceived as conflicts of interest. For example, an OD professional who is also a coach may know about a pending restructuring that may impact his client. While the information could be helpful to the client, the coach may be unable to broadcast the news. Then, when the news becomes public, it may have impact on the client's position, her functioning and the very nature of the coaching relationship.

While the individual coach's credibility may be at stake the circumstances can also impact the overall internal coaching program.

In addition to multiple roles, internal coaches have multiple relationships within the organization. Those connections can be sources of useful information for the coach, but also get in the way. For example, a 360-degree participant may have a close working relationship with the coach and that relationship might raise the question: Will the data gathered be biased by the relationship?

Internal coaches benefit from organization knowledge but they have to manage relationships carefully to guard client confidentiality. Additionally, an internal coach may, as part of his or her other duties, deliver a training program that a current or former client is attending or facilitate a team-building exercise that includes a past client. The coach in these situations needs to keep the coaching relationship separate from other activities and to reassure clients about maintaining confidentiality. These situations require a coach to have the important competency of self-management and be sensitive to even the subtlest threat to trust.

Organizational knowledge also has a downside. It can be a hindrance to listening objectively and fully to a client's story, a necessary step in engaging the client. If an internal coach has a pre-existing impression of a client, it is best to be aware of it and consciously put it aside. Open mindedness is essential to the discovery process early in coaching.

Other roles the internal coach performs may also require that boundaries be observed. For example, when a former client is up for a promotion and the internal coach is on the Talent

Management Review Committee, the coach needs to have organizational support to abstain from participating in the discussion. Making these kinds of choices can be particularly challenging part of the internal coach's role.

Another type of internal coaching boundary challenge is related to coworker relationships between coach and colleagues who know the client. A colleague may ask how the client is doing. Or, a participant in the client's informational interviews may be a past client. These overlapping relationships can provide challenges unique to internal coaches.

People, not yet identified as "clients" often seek internal coaches out for "coaching moments." These ad hoc conversations may draw on the coach's skills in listening and working through different perspectives, but strictly speaking they are not coaching engagements since there is no sponsor and no formal agreement about the process. While there are places for counseling conversations within the organization, the internal coach needs to judge if the situation has the potential to fit within the organization's internal coaching guidelines and then to take the appropriate steps to convert it to an actual coaching relationship or refer to another helping resource. If a former client seeks informal "coaching moments," the conversation might be best handled as a formal follow up to the coaching engagement. While it is always flattering to be sought out, coaching without clarity of purpose or role and boundary guidelines poses a significant risk to the overall efficacy of internal coaching.

Addressing the Possibilities and Pitfalls

To meet the challenges associated with the internal coaching role, companies that use internal coaches need to create policy guidelines. These guidelines should describe the accountabilities, goals and structure of the internal coach role in detail and be supported by senior executive sponsors. Among the issues these guidelines need to address are the following:

- Before an organization offers internal coaching, the levels and goals for the service should be defined. Coaching programs are likely to be most effective if they are clear and appropriately standardized. Who will the population served be? How will requests be made and to whom? What will the manager's role be? What will the deliverables for each type of engagement be? What about protocols regarding confidentiality and note taking/record keeping? How often and where will meetings take place? On whose budget is the service?
- Internal coach selection should be formalized. Casual selection or selection by "default," without defining core competencies, will be ineffective and potentially risky for client, coach and organization. Who will arrange the coach-client matching? How? Those typically identified to do internal coaching are most frequently in Human Resources, Organizational Development, and Learning and Development roles and have both interest and skills that can be applied to coaching. If properly trained, other business professionals may also become internal coaches.
- Creating and following clear confidentiality guidelines is critical for internal coaches. Once defined, guidelines need to be included in coach training and communicated to

managers and clients before and as part of every new coaching engagement. Just as with external coaching, not everything is confidential, but defining protected information needs to be clear and supported by the organization. Unless such guidelines are in place, clients may lightly participate in coaching but are likely to hold back from making significant revelations that might inhibit change due to uncertainty about where that information might end up.

- Create an ongoing developmental program for internal coaches to provide a common grounding and a forum to consider inevitable organizational and professional coaching challenges. Access to a cohort and or a case supervisor (internal or external,) who observe the same boundaries and confidentiality is important to the ongoing viability of the internal coaching function.
- Assessment tools, if used, should be selected, their uses taught, and their applications woven into the programs offered.
- Offering internal coaching often requires a dedicated person or function to manage internal coaching engagements and processes.

When an organization understands the possibilities and pitfalls of using internal coaches and takes action to maximize the former and minimize the latter, it then can provide more robust coaching services deeper in their organizations.



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