

## Chapter 4: Coach Selection

### Locating Coaches

How are organizations finding external coaches in the first place? And how does that compare with what external coaches report? Such questions spark discussions surrounding selection processes in the field of executive coaching. The top three choices for locating coaches this year (*Source coaches from vendors, Referrals, and Coaches make contact with LD/HR*) remained the same from 2013. Organizations (94%) reported that locating coaches from vendors was their most commonly used method for selecting coaches (contrasted to 63% of coaches). The organizations response increased from 85% who selected this same choice in 2013. Figure 26 displays the breakdown of this year's responses.

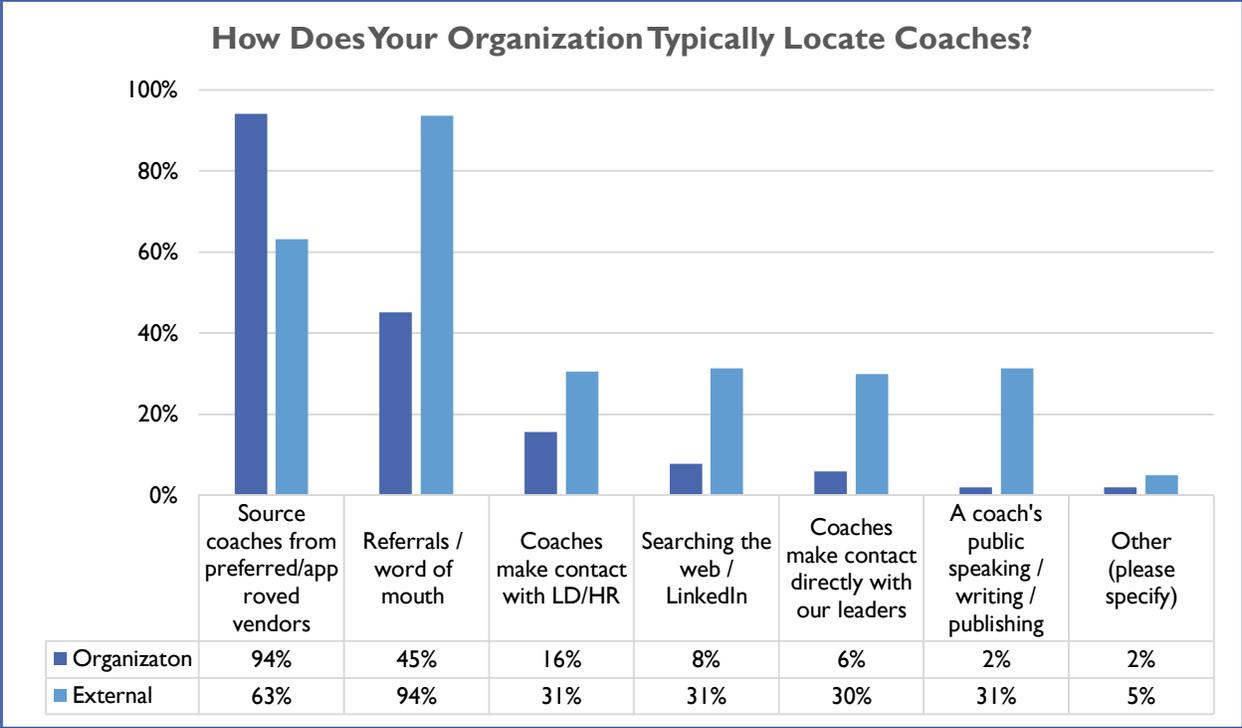
Regarding coaches, however, externals recorded that *Referrals* (94%) were their clients' preferred method for locating them. This was an increase from 74% of coaches who reported this in 2013. Across the board, significantly fewer external coaches reported being located by any other method than *Referrals* when compared to 2013 results. Such large drops might be designated by the reported increase that coaches are now most frequently sought out through word-of-mouth referrals.

Outside of the top choices for organizations and external coaches respectively, *Coaches make contact with LD/HR* was also a top choice. However, when compared to 2013 response rates, this choice decreased for organizations by 26% and for external coaches by 14%. Another response that also decreased in use was *Coaches make contact directly with leaders*.

Also, in 2013, we were interested to see if organizations located coaches using online recruiting methods (e.g., LinkedIn, web searches). Between both organizations and coaches, *Searching the web/LinkedIn* increased from roughly 14% in 2013 to about 20% in 2017. In a technologically advancing world, this rise in online methods for locating coaches may continue to be a rising trend for years to come.

The 2017 survey provided respondents with additional options to select *A coach's public speaking/writing/publishing* and *Other* as additional options. Only 2% of organization selected *public speaking/writing/publishing*, compared to 31% of coaches who believe this to be the case.

Under the *Other* answer choice, external coaches highlighted the importance of “networking” as contributing to the number of client referrals they received. Although organizations did not necessarily discuss networking as much as external coaches, this may be due to organizations choosing to use vendors as a form of “networking”. Instead of personally reaching out to a referred coach, organizations may be sending referrals to vendors for a pre-selection process. Thus, organizations might attribute locating a coach to a vendor although they were essentially networking by being given a prospective coach's name through a referral.



**Figure 26. Locating Coaches**

## Coach Selection Criteria

Often the most popular data from these studies have concerned the key criteria corporations and executives use in selecting coaches – and the comparisons between these responses and those of coaches. This year, 13 answer choices were offered to all four rater groups.

As was the case in 2013, *Ability to build rapport, trust, and comfort with the leader*, *Experience and skills as a coach*, and *Experience dealing with specific leadership challenges* were the top three criteria for all four groups. In fact, the *Ability to build rapport, trust, and comfort with the leader* has been the #1 criteria in coach selection since 2005. Though this response remained the top selection, percentages for this choice dropped slightly across all four rater groups. Interestingly, *Experience dealing with specific leadership challenges* also dropped (1-8%) across the four groups, but still remained a top choice. Figure 27 displays the breakdown for the important criteria when selecting coaches.

How Important Are The Following Criteria In Selecting Your Coaches / A Coach?				
(Sorted by average of all groups)	Organization	Leader	Internal	External
Ability to build rapport, trust, and comfort with the leader	95%	97%	99%	97%
Experience and skills as a coach	97%	93%	93%	94%
Experience dealing with specific leadership challenges (e.g., challenging interpersonal styles)	88%	84%	85%	86%
Business experience	88%	86%	80%	85%
Match with our culture	87%	77%	82%	79%
Area of specialty as a coach	82%	79%	72%	77%
Recommendation from colleague	67%	72%	75%	86%
Cost	79%	65%	67%	70%
Experience in our industry	71%	66%	67%	68%
Location/proximity to leader's location	78%	61%	66%	66%
Specific coaching certification	71%	60%	70%	61%
Advanced degree (Masters or Ph.D.)	68%	59%	61%	64%
Use of a specific instrument/tool	60%	55%	62%	55%

**Figure 27. Coach Selection Criteria**

*Note.* The criteria are listed in a ranked order from most important to least important as determined by the average across groups.

For organizations, *Recommendation from colleague* showed the largest drop (~15%) as a selection requirement when compared to 2013 results. Another large drop was about 11% for *Experience*

*dealing with a specific leadership challenge* as designated by executives. In contrast, the largest gain from 2013 results (+31%) as recorded by organizations was the *Use of a specific instrument/tool*.

Interestingly, organizations (78%) deemed *Location/proximity to leader's location* as more important than leaders (61%) and coaches (66%). Logistically, organizations might be more financially concerned when it comes to the selection process for coaches (79% of organizations selected *cost*, higher than the other groups). Since sourcing coaches that are farther away can be more expensive, a coach's location might be more important to organizations than the other groups.

Although respondents still rated *Use of a specific instrument/tool* as the least important overall criteria, this year's rates increased by roughly 26-34% across the four groups from 2013. Additional criteria that increased in importance overall across the groups were having a *Specific coaching certification* and an *Advanced degree (Masters or Ph.D.)*. Particularly, internal coaches displayed the largest increase (up 25% from 2013) in importance for coaches to have an *Advanced degree*. Though having a degree may have increased statistically, it is still a less important factor this year. Similar to 2013, all four groups also agreed that having an *Advanced degree*, *Specific coaching certification*, and *Use of a specific instrument/tool* were the least important criteria. Though having a specific certification increased in importance for organizations, leaders, and external coaches, it actually decreased in weight by 8% for internal coaches. Additionally, whereas the 2013 results indicated that there was an outlier for *Specific coaching certification* (internal coaches rated it as high as 78% in importance), all four groups generally agreed within a 10% range concerning the bottom three criteria this time around.

Overall, there was a general increase in response percentages across all four groups for the 2017 study.

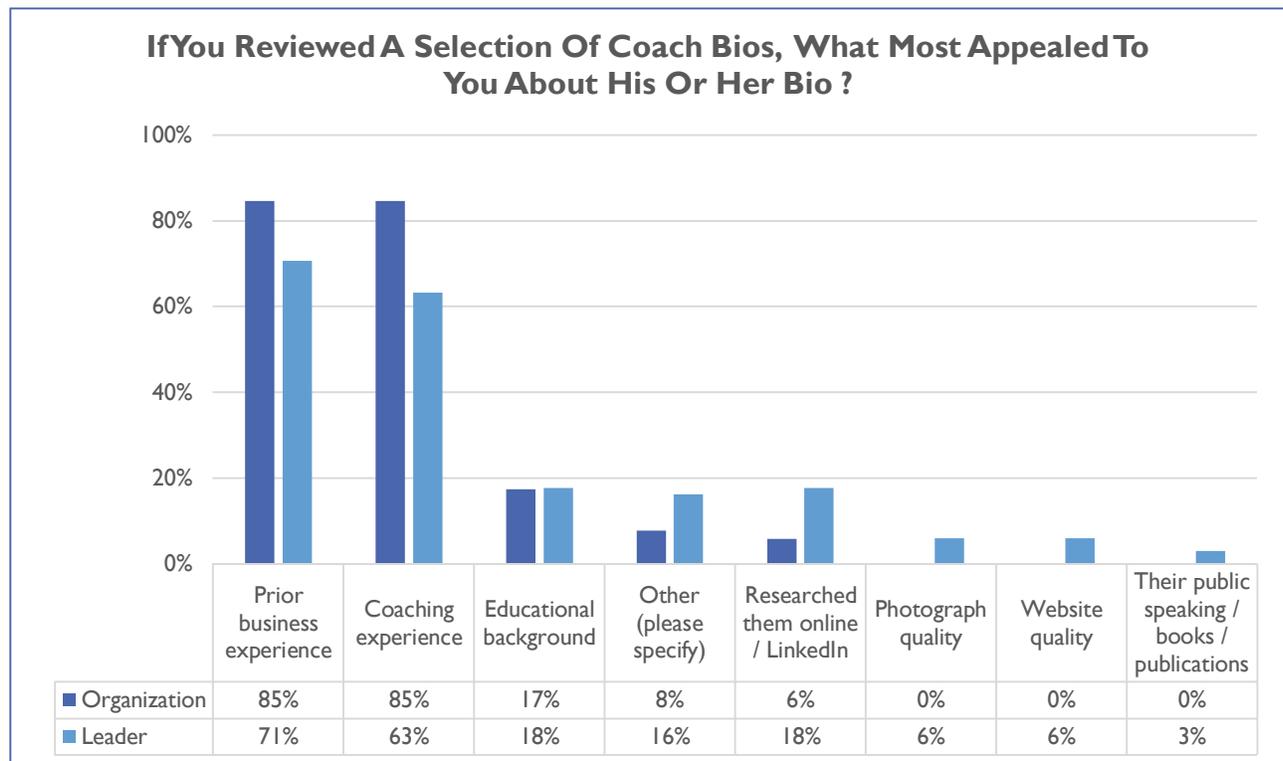
## Coach Biographies

A new question in 2017 attempted to explore what specifically about coach bios was most appealing to organizations and leaders. Organizations and leaders were asked “If you reviewed a selection of coach bios, what most appealed to you about their bios?” Figure 28 displays the overall breakdown of noteworthy coaching bio criteria.

The most frequent response from organizations was a tie between *Prior business experience* (85%) and *Coaching experience* (85%), with a stark drop to *Educational background* (17%). Little or no organizations selected *Researched them online / LinkedIn* (6%), *Quality of their photograph* (0%), *Quality of their website* (0%), *Their public speaking / books / publications* (0%).

There were some differences for leaders, who recorded that *Prior business experience* (71% - 14% lower than organizations) was the most appealing element of a coach’s bio. Leaders selected *Coaching experience* next (63%, 22% lower than organizations) and *Educational background* (18%). Leaders gave slight more credibility to researching the coach online / LinkedIn (18%), as well as photograph (+6%), website quality (+6%) and public speaking/books/publications (+3%).

These findings strengthen the notion that prior experience is the most alluring criteria when selecting coaches for assignments. Our advice to coaches is to highlight prior business experience and coaching experience within the first two paragraphs in their bios.



**Figure 28. Coach Bio Appeal**

Some “Other” write-in leader responses stated that it was important to experience prospective coaches prior to the selection process. For example, one leader stated, “I had to experience them [coaches] in another engagement. A conference, another intervention, a professional association, etc. I have to personally experience them.” This gives additional credence for the importance of a chemistry session prior to starting coaching, perhaps where the coach offers an actual coaching experience as part of the dialogue.

## Certification of Coaches

A hot topic in the world of coaching is to what extent a coach's certification may impact his or her ability to be selected for assignments. Since 2005, our study has aimed to measure the industry's view on certification.

This year, organization respondents were specifically asked, "Do most of your coaches hold a coaching certification (e.g., ICF 'Master Certified Coach'; Coaches Training Institute; Hudson Institute; Newfield Network 'Ontological Coach')?" Results indicated that roughly 71% of organizations stated Yes, 8% responded No, and 20% did not know. Thus, a majority of organizations contract or work with coaches who are certified. This statement may be strengthened further since less than 10% of respondents selected No.

Would organizations be more or less likely to hire a certified coach? The 2005 study indicated that only 29% of organizations would be *More likely to use a certified coach*, the 2013 study indicated that 59% of organizations would be more likely, and this year's results indicated that 71% of organizations would be *More likely to use a certified coach*. Thus, a coach's certification status has continued to increase in relevance.

Almost 50% of leaders determined that they would be more likely to select a coach with a certification. Though 32% of leaders recorded that they do not know enough about coaching certifications, only 20% of leaders deemed that a certification would not affect their willingness to use a coach. In 2005, 63% of leaders indicated that they did not know enough about certifications, which then decreased to 27% of leaders selecting this response in the 2013 study. Essentially, this signifies that leaders have become more familiar with coaching certifications and thus have a preference for a certified coach.

Though there was a smaller margin of difference this year, internal coaches (44%) still valued certifications more highly than external coaches (32%). Surprisingly, both 38% of internal and external coaches recorded that they *don't know enough about certification to answer this*. Figure 29 displays the results.

Would A Coach's Certification Influence Your Willingness To Use Them?				
	Organization	Leader	Internal	External
More likely to use a certified coach	71%	48%	44%	32%
Certification would not influence decision	27%	20%	18%	29%
Less likely to use a certified coach	2%	0%	0%	1%
I don't know enough about certification to answer this	-	32%	38%	38%

Figure 29. Influence of Certification

Other than a 2% increase for internal coaches, *Certification would not influence decision* decreased for the other three groups over time. Specifically, organizations recorded a 14% decrease and

executives recorded a 17% decrease in this response from 2013. This decrease might further strengthen the idea that certifications are beginning to become a more prominent factor when determining which coach to use for executive coaching. Similarly, CoachSource's own experience in the past two years has been that an increasing number of clients are asking for certified coaches.

## Educational/Training Backgrounds of Coaches

An oft-discussed topic in the coaching industry centers around the appropriate educational or training experiences coaches should obtain. This study has taken a deeper look at which trainings/certifications coaches had obtained, and which they feel are most credible in the marketplace. Figures 30 and 31 display the results.

Both internal and external coaches recorded possessing similar backgrounds for the most part. Similar to the 2013 study, a *Masters degree* was the most common education background for both internal (69%) and external coaches (62%). Although, as was the case in 2013, fewer internal coaches (13%) had a *Ph.D.* background than external coaches (21%). Though it may be suggested that educational prerequisites might be different for internal and external coaches, such a difference may be understood more as a difference in which certifications/experiences are more important for internal coaches.

In 2017, the most common certifications were ICF certifications (PCC: Internal Coaches – 19%, External Coaches – 31%; ACC: Internal Coaches – 25%, External Coaches – 12%). Though the specific ICF certifications were not parsed out in 2013, ICF certifications were the third most common certification for internal coaches (39%) and external coaches (25%). Additionally, the largest drop in popularity based off 2013 results the Hudson Institute certification. In 2013, 36% of internal coaches (6% in 2017) and 4% of external coaches (5% in 2017) reported having a Hudson Institute certification.

The vast plethora of training options in the industry is easily represented by this study's finding that the second most common educational/certification background among coaches was designated by the *Other* category (40% of internal coaches and 41% of external coaches). The following were some of the most commonly noted additional certifications:

- Center for Creative Leadership (CCL)
- iPEC Coaching
- EQ-I; EQ360
- College of Executive Coaching
- Gallup Strengths Certified Coach
- Paterson LifePlan Coach
- Impact Coaching Solutions (ICC)
- Certification – APECS
- iCoach NY Certification

In 2013, the second most-selected option was also *Other*, which hinted at the idea that more options were needed to accurately represent a coach's background.

<b>Which Educational Background And/Or Certifications Do You Have?</b>		
<i>(Sorted by average of all groups)</i>	<b>Internal</b>	<b>External</b>
Masters Degree	69%	62%
Other (please specify)	40%	41%
Certification - ICF PCC	19%	31%
Certification - ICF ACC	25%	12%
Doctorate Degree	13%	21%
Training - Coaches Training Institute	22%	11%
Training - Marshall Goldsmith SCC Certification	7%	13%
Training - New Ventures West	6%	6%
Licensed Psychologist	3%	8%
Training - Hudson Institute	6%	5%
Training - Neuroleadership Institute	7%	3%
Training - Coach U	0%	8%
Certification - ICF MCC	0%	7%
Certification - BCC	1%	5%
Training - Newfield Network	0%	6%
Training - Fielding	3%	2%
Training - Georgetown	3%	1%
Certification – Association for Coaching	1%	2%
Certification - EMCC EIA Practitioner	1%	1%
Training - Columbia	1%	1%
Training - Sherpa	1%	0%
Certification - EMCC EIA Senior Practitioner	0%	1%
Certification - EMCC EIA Master Practitioner	0%	1%

**Figure 30. Coach Educational Background**

Coaches were asked to rate which educational backgrounds and/or certifications held the most credibility in the marketplace – Whether or not they possessed these backgrounds. Figure 31 displays coaching perceptions regarding the most credible educational backgrounds and/or certifications of coaches in the marketplace.

Other than selecting *Masters*, both internal and external coaches answered this question differently than in the previous section. Internal coaches number one choice was the ICF PCC certification (54%), whereas external coaches top selection was having a *Masters* degree (59%). Generally, internal coaches rated ICF certifications as being more credible than external coaches did. This may suggest either that coaches believe there are new educational or certification trends emerging in the field or that they believe future coaches may need further prerequisites. Interestingly, both internal coaches (38%) and external coaches (41%) rated having a *Doctorate (Ph.D. or PsyD)* as the third most credible credential for a coach to have. Although only 13% of internal coaches and 21% of external coaches stated having a *Doctorate* in the previous section, this perception of credibility may provide further insight as to what credentials matter now and which ones will matter in the future.

Regarding significant drops, both internal (12%) and external coaches (17%) selected the *Other* response less frequently than in 2013 (Internal – 63%; External – 49%). This drop might indicate that the additional response selections added to the 2017 survey may be providing a more thorough response set for participants to choose from now.

Also, since 2005, both the 2013 and 2017 studies have ranked having an *Advanced degree (Masters)* and *ICF Certification(s)* as the top two most credible credentials in the marketplace across both groups of coaches.

*"Where I received my training is less important than where I worked before I was a coach."  
- External Participant*

<b>Which Educational Background And/Or Certifications (Whether You Hold Them Or Not) Do You Feel Are The Most Credible In The Marketplace?</b>		
<i>(Sorted by average of all groups)</i>	<b>Internal</b>	<b>External</b>
Masters Degree	49%	59%
Certification - ICF PCC	54%	42%
Doctorate Degree	38%	41%
Certification - ICF MCC	42%	38%
Certification - ICF ACC	31%	19%
Licensed Psychologist	18%	16%
Other (please specify)	12%	17%
Training - Coaches Training Institute	15%	12%
Training - Marshall Goldsmith SCC Certification	9%	17%
Training - Hudson Institute	11%	13%
Training - Neuroleadership Institute	12%	6%
Training - Georgetown	6%	10%
Training - New Ventures West	8%	8%
Training - Columbia	8%	8%
Training - Newfield Network	6%	7%
Training - Fielding	5%	7%
Certification - EMCC EIA Senior Practitioner	5%	5%
Certification - AC	5%	2%
Certification - BCC	3%	3%
Certification - EMCC EIA Master Practitioner	2%	5%
Training - Coach U	0%	5%
Certification - EMCC EIA Practitioner	2%	3%
Training - Sherpa	0%	1%

**Figure 31. Perception of Educational Background in Marketplace**

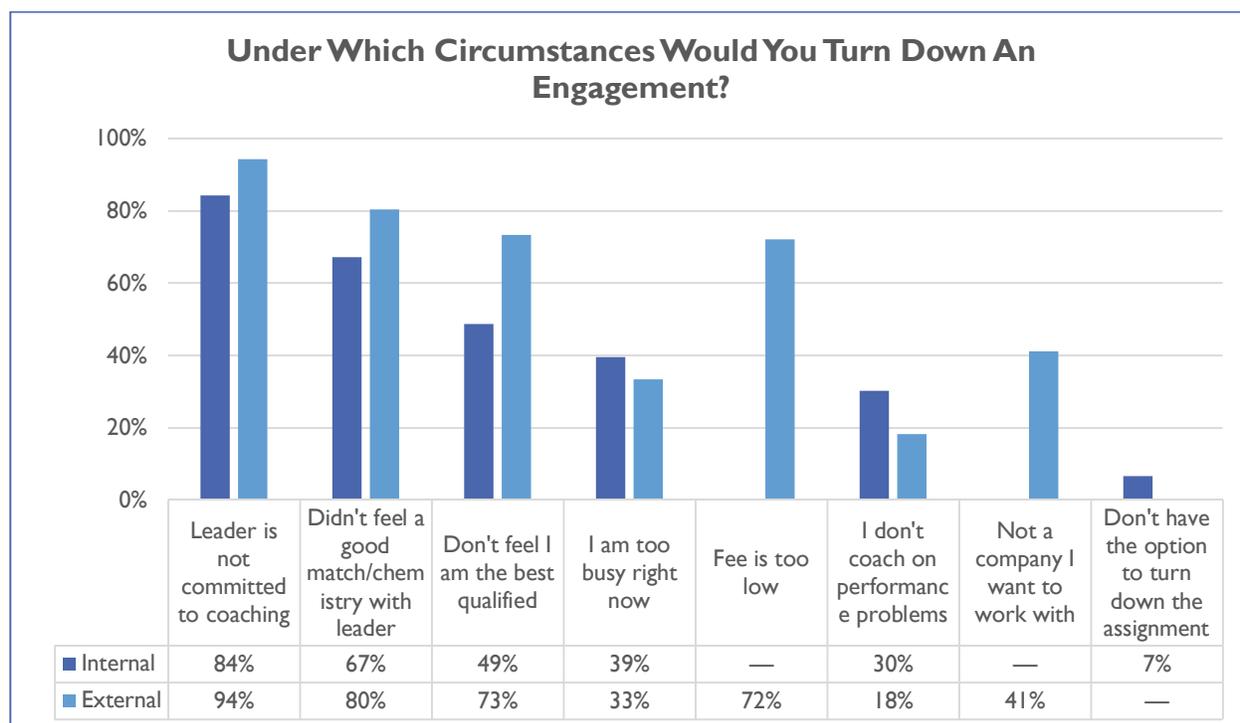
Note that many of the choices received fewer overall votes than the prior table (which educations/certifications coaches held). For example, 69% and 62% of internal and external coaches held a Masters degree (the top choice), but 49% and 59% selected it as having the most market credibility (still the top choice).

## Turning Down Assignments

Coaches, both internal and external, often have the right to turn down engagements with leaders. Whether internal or external in nature, various concerns may impact coaches to such a level that they either decline prospective engagements or terminate current interactions.

Figure 32 represents the most common circumstances under which coaches turn down assignments. First selection was (1) *Leader is not committed to coaching* (84% of internal coaches, 94% of external coaches), (2) *Didn't feel a good match/chemistry with leader* (67% internals, 80% externals), and (3) *Don't feel I am the best qualified (to work on the identified issue)* (49% of internal coaches, 73% of external coaches).

Externals were generally more likely to select various choices than internals. Externals were less willing to work with a leader not committed to coaching (-10% difference), where they didn't feel a chemistry (-13%) and when they didn't feel best qualified to do the work (a very large -24%). Along with that, 7% of internals indicated they don't have an option of turning down assignments.



**Figure 32. Turning Down Assignments**

A novel option, *I am too busy right now*, was added in response to trends we are seeing among coaches more regularly. Unsurprisingly, internal coaches reported this to be their 4<sup>th</sup> most likely situation whereas external coaches reported this choice as their 5<sup>th</sup> most likely situation. Given that 56% of internals reported *Time* as their greatest challenge to being an internal coach

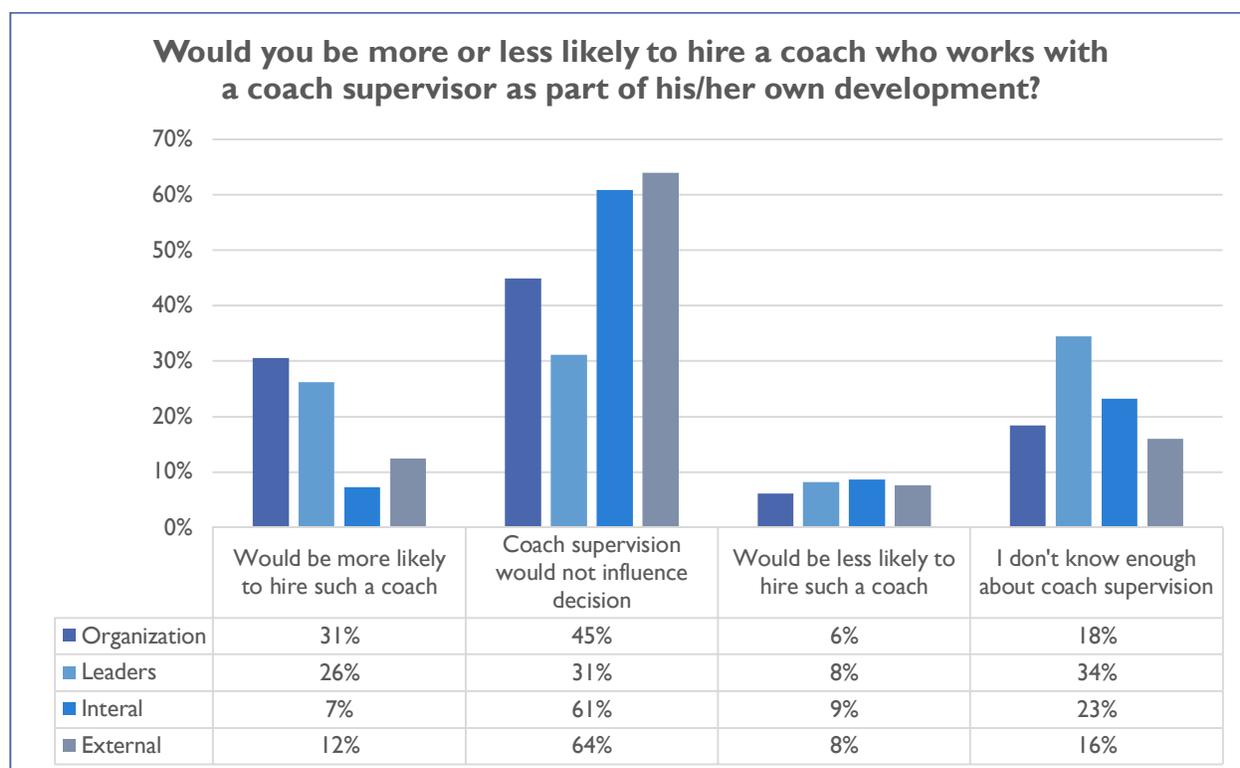
(#1 choice of internals), internals are still less likely to turn down assignments than would be expected due to time constraints.

Interesting, external coaches selected *Fee is too low* #4 out of the #7 choices, supporting our company's observation that coaches often take into account many more factors than just cost when evaluating taking on an assignment.

## Coaching Supervision

In relation to internal coaching, we asked all four rater groups, “Would you be more or less likely to hire a coach who works with a coach supervisor as part of his/her own development?” Essentially the responses aimed to determine whether corporate personnel and coaches wanted another individual to analyze a coach’s engagements. The top choice amongst organizations (45%), internal coaches (61%), and external coaches (64%) was *Coach supervision would not influence decision*. Other than internal coaches, organizations (6%), leaders (8%), and external coaches (8%) marked *We would be less likely to hire such a coach* as their bottom choice. Figure 33 displays this year’s breakdown of responses.

Though 34% of leaders chose that they did not know enough about the processes regarding coaching supervision, 31% of leaders said that coach supervision would not influence their decision to hire to a coach while 26% reported that they *Would be more likely to hire such a coach*. What is noticeable about these findings is that leaders seem to be divided almost equally; 1/3 would be more likely, 1/3 would not be influenced, and 1/3 simply do not know enough about coach supervisors.



**Figure 33. Likelihood to use a Coach Supervisor**