

CORPORATE LEADERSHIP COUNCIL

*May 2003*

# MAXIMIZING RETURNS ON PROFESSIONAL EXECUTIVE COACHING

- ❖ Identifying “Best Fit” Coaches
- ❖ Focusing Coaching on Business Needs
- ❖ Optimizing Executive–Coach Matching
- ❖ Leveraging Senior Manager Participation
- ❖ Managing Coaches to Performance Standards



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*A series of diagnostic questions helps HR professionals and senior executives assess the likelihood of high returns on their organizations’ current coaching strategy.*

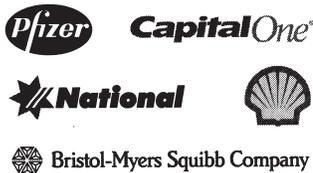
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*Five key strategies support the successful evaluation, recruitment, and deployment of a panel of professional coaches approved to serve the organization’s executives.*

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HILLENBRAND INDUSTRIES

*Senior executives’ coaching needs are prioritized based on an assessment of resources required to ensure the achievement of business-level strategic initiatives. Professional coaching is provided to key value creators identified through the business strategy and planning process. Coaching interactions are designed to achieve specific business-related goals and develop leadership capabilities.*

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*Embedded in an online tool, a set of decision rules provides the framework for effectively matching the company’s executives to professional (business) coaches. Executives complete an online questionnaire detailing the types of coaching that will support their business aims, and an algorithm matches requirements against key coach characteristics supplied by the coaches and stored on a database. The tool yields a list of three “recommended” individuals whom executives interview before making a final choice.*

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*An executive coach “broker” offers a three-fold, paid-for service package to executives requesting coaching and their businesses. Significantly, a coach broker appraises coaching requests with a view to individual and business needs, screens the coaching pool against rigorous criteria, and matches coaches to clients. Once this has been accomplished, a coach broker maintains close contact throughout the engagement to ensure that the match is successful and conducts a service satisfaction review at the end of each engagement.*

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*A structured process embeds managerial participation and reinforcement into every element of the coaching value chain. The manager signs off on coaching development goals and provides formal feedback at the coaching engagement’s mid- and end points. In addition, the manager, coach, and individual meet informally to discuss progress against coaching goals.*

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*A senior-level mentor provides the coached executive with broader organizational visibility and secures appropriate developmental opportunities across the organization.*

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*A three-part strategy optimizes the management of a diverse group of external coaches. First, a standardized coaching model governs all coaching engagements in the organization. Second, a lead coach manages the professional coaches as a team, assisting in staffing decisions, monitoring performance, and offering feedback to coaches. Finally, all coaches regularly convene as a group to debrief on coaching progress and development trends within the organization.*

### “EXECUTIVE COACHING” DEFINED

For the purpose of this research, the Council focused on external professional coaching.

Further, the Council’s investigation of best practices in this field has focused on coaching geared toward executive skills development and performance enhancement, as opposed to coaching aimed at corrective improvement of poor performance or improvement of technical skills.

Even with this focus, many members have reported that the practices and principles included herein are also very applicable to the management of internal coaches and coaching targeted at other distinct objectives.

## *Advisors to Our Work*

The Corporate Leadership Council expresses its appreciation to all of the individuals and organizations who have so generously contributed their time and expertise to our work. Their contributions have been invaluable, and we extend our sincere thanks to all of these advisors. A partial list of participants is included below.

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AmeriCredit Corp.	Grant Thornton International
Apple Computer, Inc.	Gulf States Paper Corporation
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AT&T Corporation	Hillenbrand Industries
Bayer AG	Ingram Micro Inc.
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# KEY FINDINGS

- ① **A Growing Trend**—Organizations around the world indicate a growing excitement about the potential positive impact of coaching as a leadership development intervention.
- ② **A Costly Preference**—Council research shows that executives have a strong preference for executive coaching but also that such coaching is very expensive compared to other leadership development activities.
- ③ **Inconsistent Implementation**—Despite executives' preferences and the high cost involved, organizations are rarely managing coaching investments in a coordinated or consistent manner.
- ④ **Inconsistent Returns**—Member organizations report significantly variable returns on coaching engagements, and Council research indicates that poorly implemented coaching is unreliable as a driver of improvements in employee or business performance.
- ⑤ **Council Response**—The Council has identified five challenges that inhibit the effective management and utilization of executives coaches within organizations. These challenges impede both the development of positive coaching engagements and the linkage of these engagements to business results. The strategic practices identified in this study address the following five problems.

**Difficulty Finding “Best Fit” Professional Coaches**—An abundance of coaching providers coupled with an absence of coordinated coach recruitment approaches prevents organizations from identifying suitable coaches.

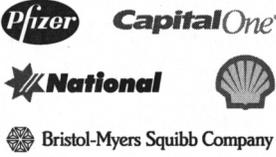
**Unfocused Coaching Engagements**—Organizations often do not appropriately prioritize coaching engagements, offering coaching based on the merits of an individual request rather than business needs and requirements.

**Poor Matching of Coaching Resources to Executive Requirements**—High-impact coaching depends on a positive relationship between executive and coach, yet few organizations are able to ensure accurate matching of coaches' experience and personalities with executives' needs and requirements.

**Disconnect from the Organization**—The “behind closed doors” nature of coaching engagements often means that coaching goals do not correspond with business or organizational requirements and coaching fails to generate an ongoing impact for the business.

**Inconsistent Delivery and Quality of Coaching**—A wide diversity of coaching approaches and styles prevents organizations from effectively implementing and managing a performance standard for coaches across the organization.

# SOLUTIONS IN BRIEF

Key Coaching Challenges	Critical Responses	Featured Practices
<p>Difficulty finding “best fit” professional coaches</p>	<p>Standardize recruitment efforts</p>	 <p>Practice #1: Strategic Coach Sourcing Protocol (Council Composite)</p>
<p>Unfocused coaching engagements</p>	<p>Prioritize by business requirements</p>	<p>HILLENBRAND INDUSTRIES</p> <p>Practice #2: Business-Driven Coaching Prioritization</p>
<p>Poor matching of coaching resources to executive requirements</p>	<p>Create and deploy matching protocols</p>	 <p>Practice #3: Coach Finder Tool</p> <p>Practice #4: Executive Coach Broker</p>
<p>Disconnect from the organization</p>	<p>Foster line manager involvement and senior manager advocacy</p>	 <p>Practice #5: Manager-Led Coaching Engagement</p> <p>Practice #6: Mentor-Assisted Coaching Program</p>
<p>Inconsistent delivery and quality of coaching</p>	<p>Create overarching model and knowledge networks</p>	 <p>Practice #7: Coaching Bench Management Strategy</p>



# CHAPTER II

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## *Focusing Coaching on Business Needs*

— PROFILED PRACTICE —

Practice #2: Business-Driven Coaching Prioritization

**HILLENBRAND INDUSTRIES**

## PRACTICE #2: BUSINESS-DRIVEN COACHING PRIORITIZATION

### HILLENBRAND INDUSTRIES

**Industry:** Health Care Services and Funeral Services  
**Employees:** 10,300 in 2002  
**Revenues:** Approximately \$2.2 billion in 2002  
**Professional Coaches:** Approximately 4 in 2002  
**Executives Receiving Professional Coaching:** 11 in 2002

### Description

Senior executives' coaching needs are prioritized based on an assessment of resources required to ensure the achievement of business-level strategic initiatives. Professional coaching is provided to key value creators identified through the business strategy and planning process. Coaching interactions are designed to achieve specific business-related goals and develop leadership capability.

### Goal

The goal of the practice is to focus scarce coaching resources on those individuals whose performance matters most to the current and future success of the business.

### Result

The number of professional executive coaching engagements drops by 50 percent between 1999 and 2002. However, where professional executive coaching does occur, it is deployed against a specific strategic context. Coached leaders consistently execute successfully against aggressive business goals, often shortening project timeframes or exceeding revenue targets.

### Key Differentiating Feature

The approach goes beyond standard practice in its unique implementation of "strategic coaching" that provides coaching based on a demonstrable business need. A second key-differentiating feature lies in the thorough business orientation of professional coaching engagements. Hillenbrand frames coaching targets explicitly in business terms, asking the coach to create a linkage for the executive between his or her business targets and behaviors that support the achievement of those targets.

### Practice Driver

Recognition that undifferentiated use of coaching resources reduces business returns on coaching/leadership development.

## **HILLENBRAND INDUSTRIES**

*Based in Batesville, Indiana, Hillenbrand Industries provides health-care services and funeral services. In 2002, the company employed 10,300 individuals and generated annual revenues of approximately \$2.2 billion.*

### **Situation**

- In 2000, the new VP of Executive Development at Hillenbrand conducts an audit of ongoing leadership development interventions and their cost. The audit shows a widespread use of professional executive coaches among executives in all parts of the business.
- A more detailed investigation of the costs and benefits of coaching reveals that a significant percentage of the executives who worked with a professional coach left the organization within two years.
- The VP of Executive Development concludes that an undifferentiated approach to providing professional executive coaches to the organization's leaders presents an unjustifiable expense with too little returns for the organization.

### **Action**

- Working with the Executive Management Teams (EMTs) of Hillenbrand's three operating companies and corporate headquarters, the VP of Executive Development develops a new strategy for deploying professional executive coaches in the organization and Hillenbrand implements a "top down" approach that identifies individuals with coaching requirements based on their role and contribution against the company's strategic plan.
- The VP of Executive Development also contracts with a preferred coaching provider to create a coaching model that integrates such development with the organization's overall strategy for leadership development.

### **Result**

- The number of professional executive coaching engagements occurring in the organization drops from 22 in 1999 to 11 in 2002. However, where professional executive coaching occurs, it is now deployed against a specific strategic context.
- Targeted business-driven coaching yields significant returns for the individual and the organization. Coached executives demonstrate increased potential to execute successfully against aggressive business goals, often shortening project timeframes or exceeding revenue targets.

*Practice in Context*

Hillenbrand Industries instills a business orientation into every coaching activity. This business focus is critical to prioritizing coaching requirements, developing coaching goals, conducting coaching sessions and assessing the effectiveness of professional coaching. Hillenbrand positions professional coaching as a differentiated investment in key talent.

## PROFESSIONAL COACHING AT HILLENBRAND

### Typical Stages in the Coaching Value Chain

### Typical Activities at Hillenbrand

*Who identifies a coaching need and how?*

#### Identifying Executive's Coaching Requirements

- Coaching requirements are identified based on the resource requirements of key business initiatives. Professional coaching is available to key value creators.
- The forum for identifying and prioritizing executives' coaching requirements is the business strategy and planning process. The leadership team of the company's three operating units and the corporate executive development group attend strategy and planning meetings.

*Who selects a specific coach for a specific need and how?*

#### Matching Executives and Coaches

- The Manager of Executive Development identifies suitable coaches, drawing on a pool of coaches with whom Hillenbrand executives have worked previously but also sourcing new expertise as necessary based on referrals from development professionals inside and outside of the organization.
- The Manager of Executive Development interviews the recommended coaches before proposing a coach to each coaching participant.

*What are the parameters of the professional coaching engagement?*

#### Conducting the Coaching Engagement

- Coaching typically involves two two-hour sessions per month for six to ten months.
- Professional coaches follow a very structured process with a heavy emphasis on assessment, job shadowing and performance feedback.
- In-depth qualitative 360 interviews/feedback support the identification of specific behaviors that, when strengthened, will underpin the achievement of aggressive business targets such as reduced project timelines or compliance targets.

*How is the impact of coaching assessed?*

#### Assessing Coaching Outcomes and Effectiveness

- Baseline for assessing coaching effectiveness is the executive's performance against his or her business targets.
- Coaches may also utilize additional 360 interviews/feedback processes during the coaching engagement to pinpoint the extent of behavior changes.

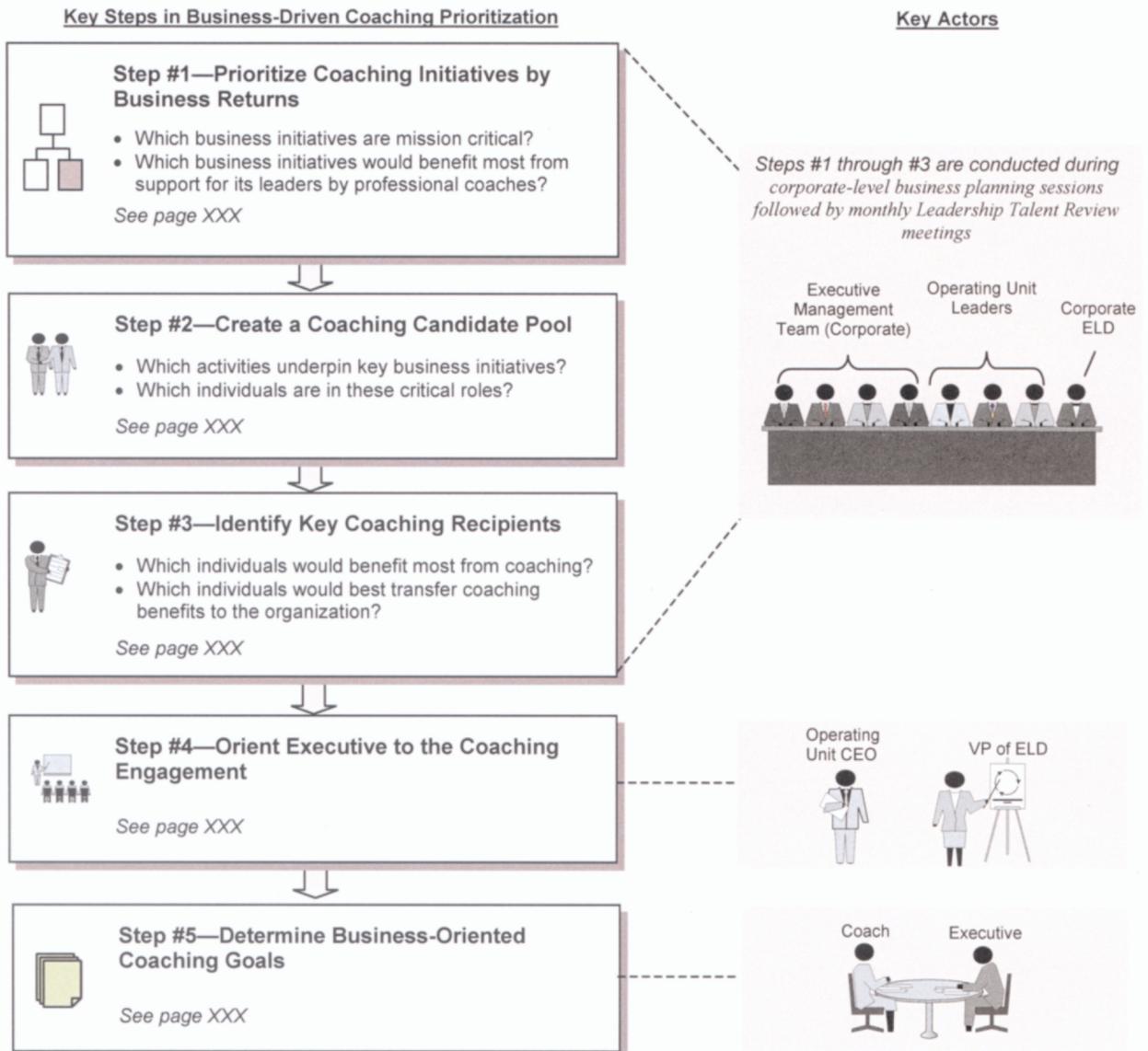
Source: CLC research; Hillenbrand Industries.

Practice Overview

Hillenbrand prioritizes professional coaching engagements by drilling down from a business initiative to the individuals accountable for leading that initiative. Identification of key coaching recipients occurs in corporate level business planning sessions followed by monthly Leadership Talent Review meeting. This is a joint effort between corporate executive development (ELD), the corporate executive management team and the leaders of each operating unit. While there are consistent decision criteria to support executive designation, there is no prescribed process. Wary of “stamping out the formula”, Hillenbrand prefers to conduct each identification exercise individually.

## BUSINESS PRIORITIES DRIVE COACHING

*Hillenbrand identifies the key audience for professional coaching through a process of mapping business initiatives to roles to individuals*



Source: CLC research; Hillenbrand Industries.

*Step #1—Prioritize Coaching Initiatives by Business Returns*

In order to identify which (if any) strategic initiatives in an operating unit would benefit most from support through professional coaching, the operating unit’s leaders, the corporate executive management team and corporate Executive Development review each initiative against four key criteria. Initiatives whose leaders will be considered for coaching typically would be rated very important to overall business success, a high level of risk without intervention, and require outstanding leadership in order to succeed.

## SELECTING BUSINESS INITIATIVES FOR COACHING

*Operating unit and corporate leadership teams measure each business initiative across four criteria to uncover the potential for returns on professional coaching*

**Initiative Selection Matrix (Illustrative)\***

Initiative	Is this initiative "mission critical"?		Why and how would the initiative benefit from coaching for its leaders?	
	① Importance to Business Success	② Certainty of Achievement without Intervention	③ Level of Risk without Intervention	④ Leadership Required for Initiative
<b>Company A</b>				
Quality Process Redesign	High	High	High	Moderate
New Product Development	Moderate	High	High	High
Acquisitions	Low	Low	Moderate	Moderate
<b>ERP Initiative</b>	High	Moderate	High	High
Data Warehousing	Moderate	Low	Low	Low
Brand Management	Moderate	Moderate	Moderate	Moderate
<b>Company B</b>				

Professional coaching for leaders of the ERP initiative will likely yield high returns as the initiative has only a moderate certainty of achievement without intervention but carries a high risk.

**Key Discussion Inputs**

- Corporate business plan
- Assessment of current capabilities
- Assessment of capabilities required to execute against the initiative
- Risk management assessment (conducted by an internal or external consultant)
- Assessment of the strength and type of leadership required to execute against the initiative

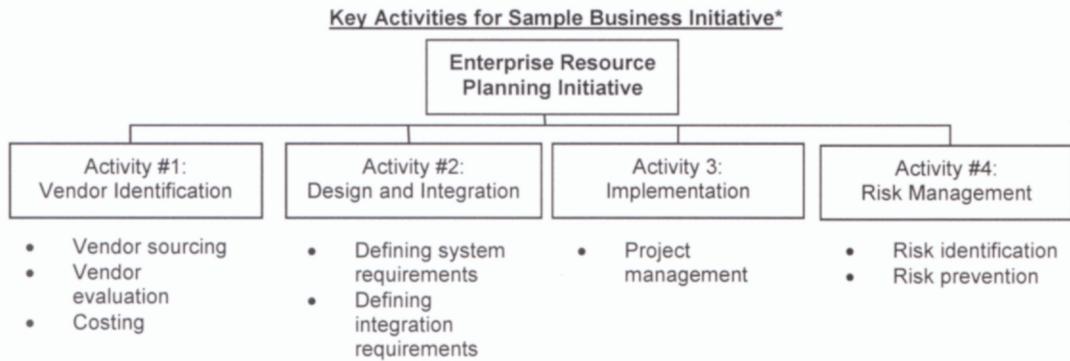
\*Source: CLC illustrative based on information provided by Hillenbrand Industries.

*Step #2—Create Coaching Candidate Pool*

Once Hillenbrand has established which business initiatives are “mission critical” and would likely benefit from coaching, the company maps key activities and roles against each initiative. Conducted jointly by the operating unit leaders, the corporate executive management team and corporate Executive Development, this activity generates a candidate pool of leaders eligible for professional coaching.

## DEFINING COACHING ELIGIBILITY

*The operating unit leaders and Executive Development break each business initiative into key activities...*



*...and map roles and leaders to each activity*

**Sample Activity/Owner Map (Illustrative)\***

ERP Initiative—Key Activities and Owners			HILLENBRAND INDUSTRIES
Activity	Role/Owner	Name	
<b>Activity #1: Vendor Identification</b>	Vendor sourcing	• Finance Director	• Person X
	Vendor evaluation	• Finance Director • HR Director • Sales Director	• Person X • Person Y • Person Z
	Costing	• CFO	• Person G
<b>Activity #2: Design and Integration</b>	Defining system Requirements	• CFO • HR VP • Sales VP	• Person G • Person H • Person I
	Defining integration requirements	• Finance Director • HR Director • Sales Director	• Person X • Person Y • Person Z

Mapping senior-level owners for each activity...

...yields a pool of senior executives eligible for professional coaching

**A By-Product of the Business Planning Process**

The exercise outlined on this page is conducted informally in the context of monthly Leadership Talent Review meetings. Hillenbrand does not dedicate special resources to identifying a pool of executives eligible for coaching; rather, the emergence of such a pool is a natural and uniquely leveraged by-product of the company's normal business planning process.

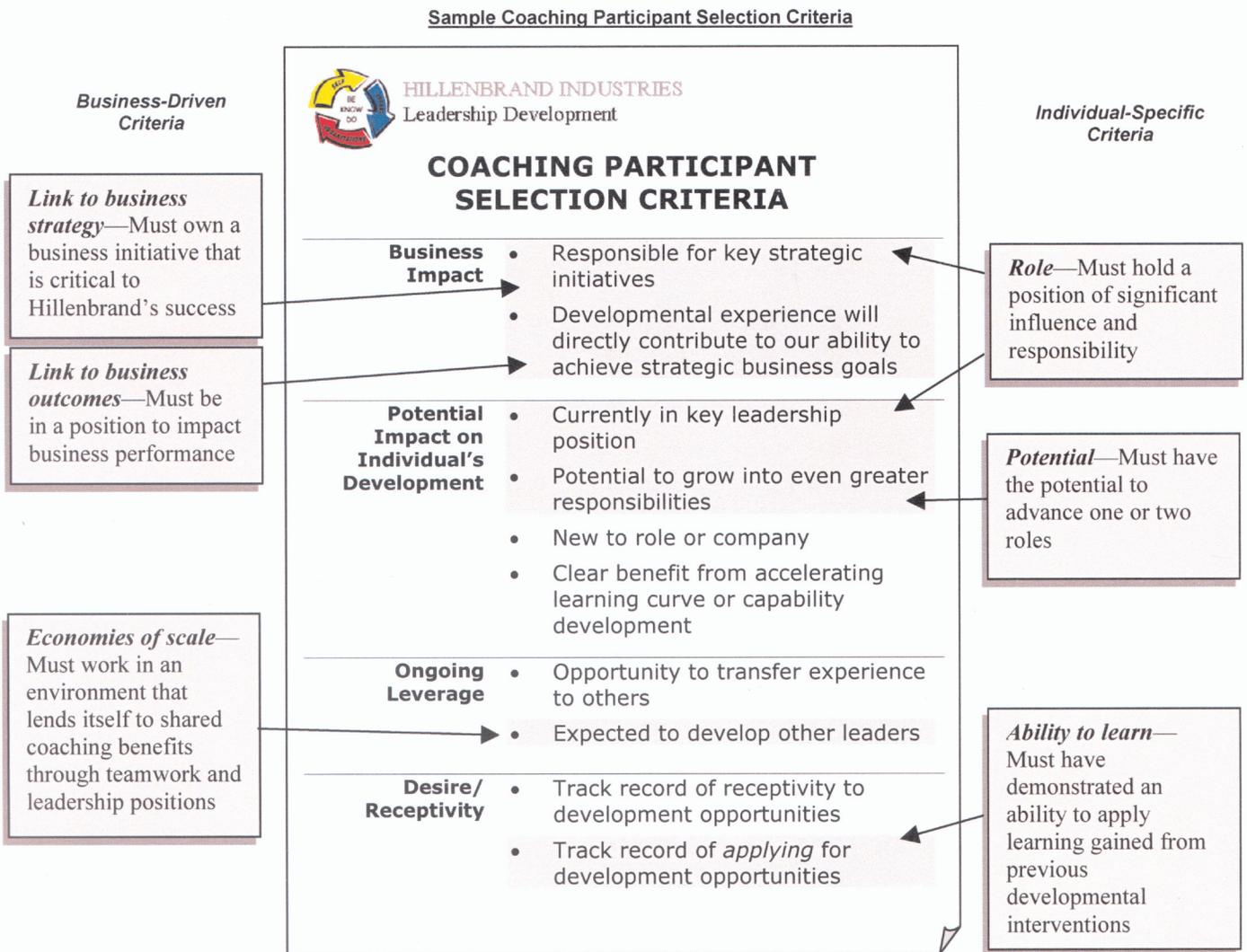
\*Source: CLC illustrative based on information provided by Hillenbrand Industries.

Step #3—Identify Key Coaching Recipients

Hillenbrand seeks to select business leaders for professional coaching who display the potential both to benefit from coaching and to transfer the experience gained from coaches to others in the organization. A further decision factor is the degree to which a coaching intervention will promote successful business outcomes.

## A DIFFERENT SELECTION OF CRITERIA

*Hillenbrand's coaching selection decisions focus on business outcomes, wider organizational benefits, and anticipated performance trajectory of the coachee*



Source: CLC research; Hillenbrand Industries.

*Step #3—Identify Key Coaching Recipients (continued)*

In two independent exercises, corporate Executive Development (ELD) and the operating unit leaders review each individual in the “eligible” pool against the selection criteria and the resulting recommendations are compared and amalgamated in a joint session. Key inputs to the decision are knowledge of current and past performance and development activities. Hillenbrand emphasizes that the criteria are not weighted and that the final decision is ultimately a call of best judgment. That said, the criteria facilitate a decision that is accurate enough to generate, on average, an 80 percent alignment between the recommendations of corporate Executive Development and the operating unit’s leaders.

## TARGETED IDENTIFICATION

*ELD and the leaders award each individual a “rating” against the four criteria and compare potential coachees’ profiles....*

Individual Selection Matrix (Illustrative)

Initiative	Candidate	<sup>1</sup> Business Impact	<sup>2</sup> Potential Impact on Individual’s Development	<sup>3</sup> Ongoing Leverage	<sup>4</sup> Desire/ Receptivity
<b>Company A</b>					
ERP Initiative	Person X	High	High	High	Moderate
	Person Y	High	High	High	High
	Person Z	Moderate	Moderate	Moderate	Low
Quality Process Redesign	Person A	Moderate	High	High	High
	Person B	High	High	High	Low
	Person C	Low	Low	Moderate	Moderate

*...before selecting executives for professional coaching*



NOT ROCKET SCIENCE

“This is not a formulaic exercise, nor is it rocket science. The matrix helps us clarify our thoughts and compare individuals—it serves as a discussion guide that offers directional guidance. Ultimately, the decision on who gets coaching is discretionary based on group consensus.”

Vice President, Executive Learning and Development and Performance Improvement  
 Hillenbrand Industries

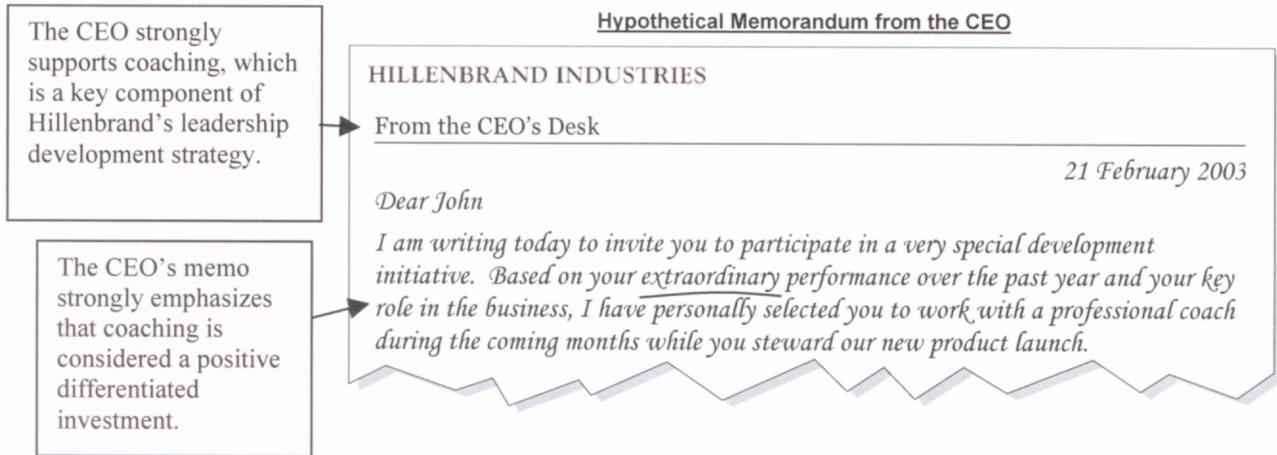
Source: CLC research; Hillenbrand Industries.

*Step #4—Onboard Executive to the Coaching Engagement*

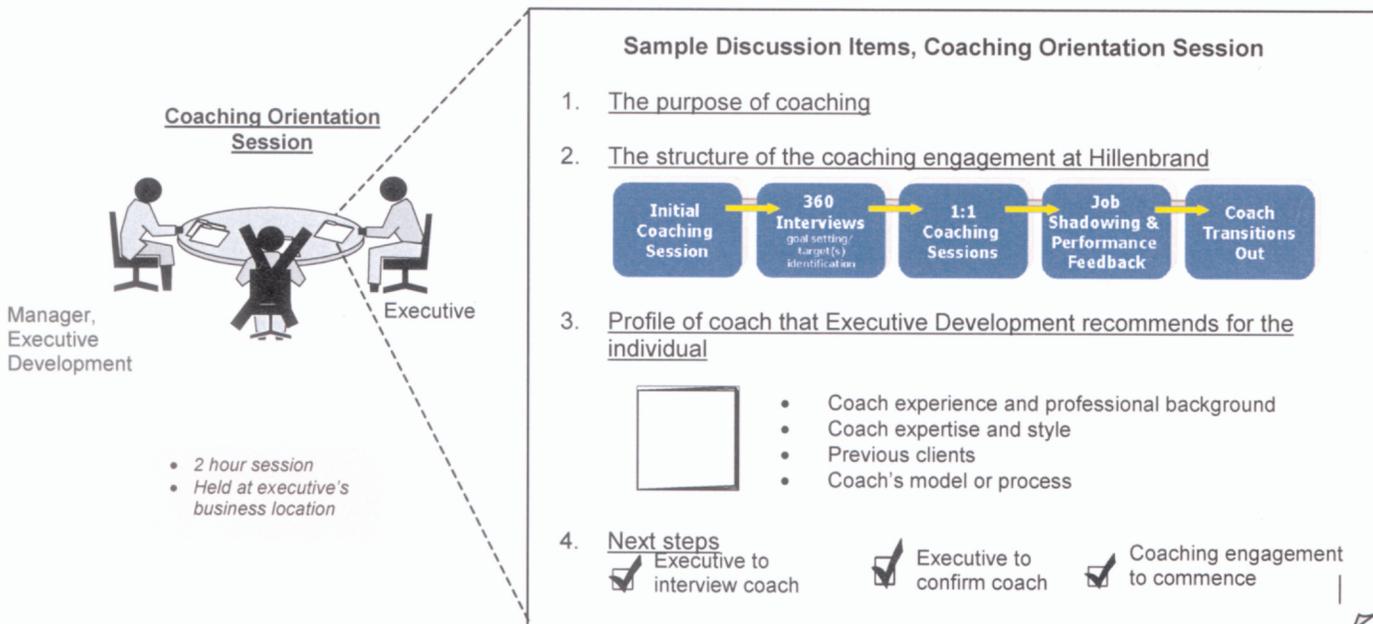
For Hillenbrand, a key coaching success factor is enfranchising the selected executive in the coaching initiative. As the executive is not the originator of the coaching request, it is critical to communicate clearly the purpose and scope of leadership coaching. Sending a strong signal that the executive has been selected to participate in a special and important development opportunity, the CEO of the operating unit sends a personal invitation to the executive to participate in coaching. Executive Development hosts an orientation session for the executive during which the executive reviews the profile of his or her recommended coach. After this point, the executive has full ownership of the coaching experience; significantly, the executive must interview the coach and either establish an ongoing engagement or request an alternative coach.

## SELECTED BY THE CEO

*Executives selected for participation in a professional coaching engagement receive a personal message from the CEO...*



*...and are invited to a coaching orientation session hosted by HR*



Source: CLC research; Hillenbrand Industries.

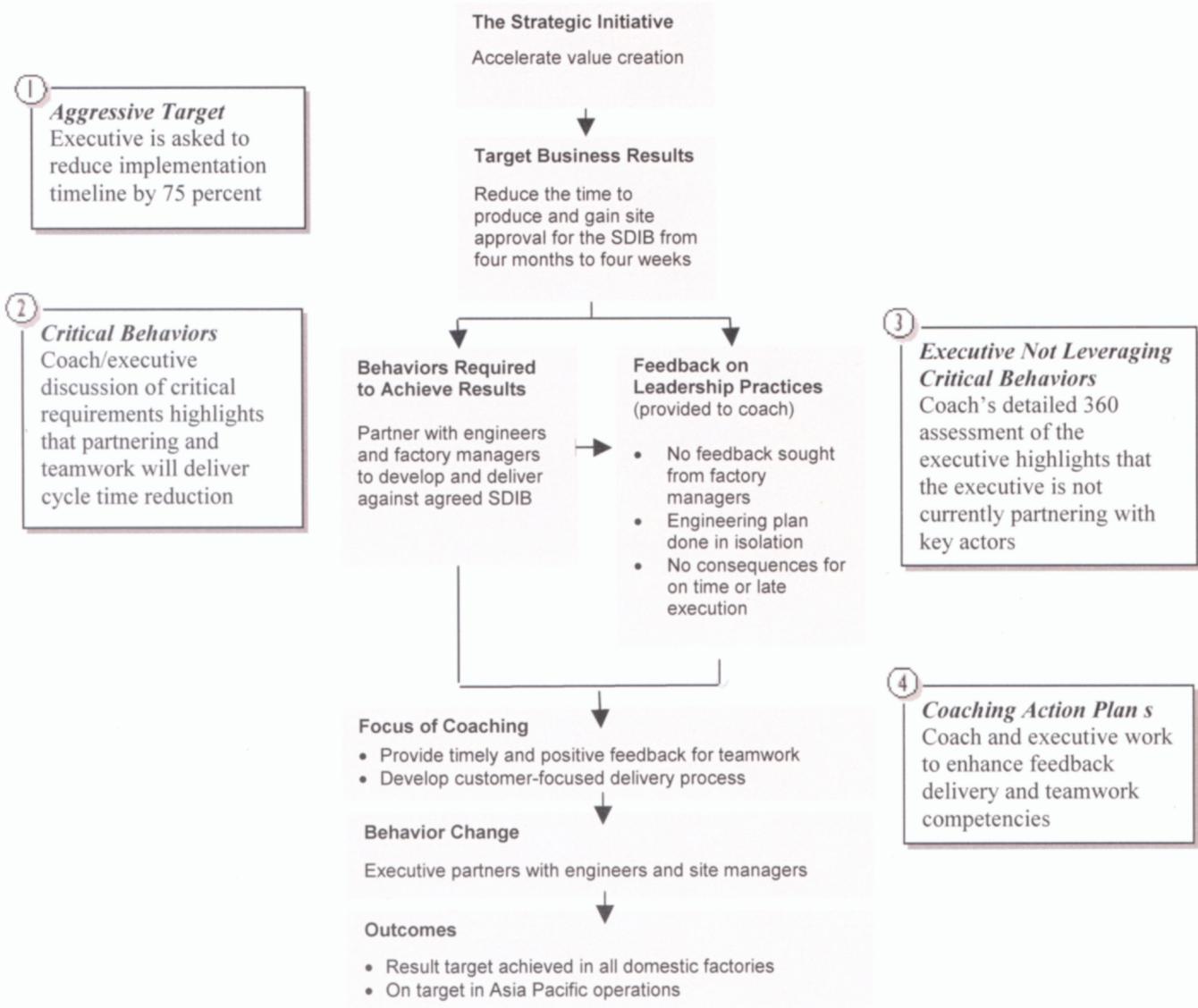
*Step #5—Determine Business-Oriented Coaching Goals*

Following a detailed “in take interview” and informal interviews with the coached executive’s manager, peers and subordinates, the coach guides the executive through an analysis of the types of behaviors that will generate the desired business results. The executive and coach examine the executive’s current performance in those behaviors based on the 360-feedback that the coach has gathered. Next, the coach leads the executive in prioritizing leadership behaviors for coaching which are embedded in a coaching action plan alongside observable targets for measuring behavior change.

## “NEW RESULTS REQUIRE NEW BEHAVIORS”

*Coach and executive discuss the linkage between leadership behaviors and business results and identify key leadership behaviors for targeted coaching*

**Sample Results/Behaviors Linkage Analysis**

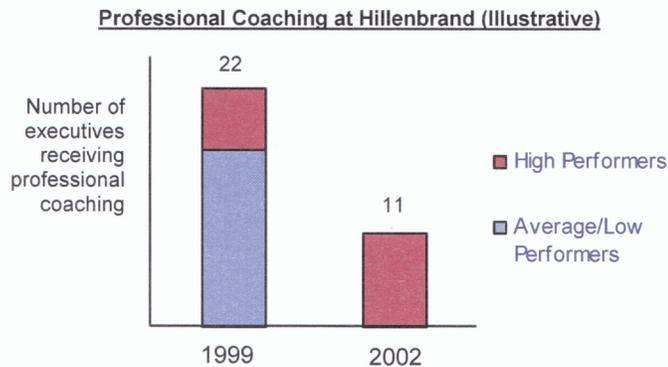


*Results*

Hillenbrand’s approach to prioritizing professional coaching has significantly reduced the number of coaching engagements while bringing such coaching to a more strategic target group of high-performing senior executives. Participating executives report an ability to outperform against aggressive targets while the organization observes a strong correlation between the occurrence of professional coaching engagements and business benefits such as cost savings through reduced cycle times.

## PRIORITIZED FOR IMPACT

*Rigorously targeted coaching reaches a high-impact talent segment....*



Hillenbrand’s approach to prioritizing professional coaching has reduced the number of coaching engagement by 50 percent by shifting the focus from the overall number of coaching engagements to their potential impact.

*...and generates benefits for the individual and the business*

### A CRITICAL INVESTMENT

“A benefit of coaching is having an objective, outsider perspective on business issues and people. I understand more clearly how people are variables to success...as well as how to be more effective at managing the performance of others through changing my behavior”

Coaching Participant, Vice-President Level

“The magnitude of the impact we have observed through professional coaching —administered strategically—is increasingly viewed as a critical investment in the organization and individuals.”

Vice President, Executive Learning and Development and Performance Improvement  
Hillenbrand Industries

*Council Assessment: Implementation Tips*

PRACTICE APPLICABILITY: BUSINESS-DRIVEN COACHING PRIORITIZATION

The only critical pre-requisite for implementing this practice is that HR must be familiar with the organization's business plan and strategic priorities. While ideally, HR should work with the management team and CEO of its organization as outlined in this practice, HR can undertake strategic prioritization of coaching engagements by simulating the context of business planning sessions using the considerations profiled on the preceding pages.

Specifically, HR should consider applying the following principles:

- Offer professional coaching to executives leading key business initiatives
- Enlist CEO or senior management support in positioning coaching as a central developmental initiative
- Focus the coaching engagement on business drivers by encouraging coaches to create linkage between business-targets and leadership behaviors

IMPLEMENTATION TIPS: BUSINESS-DRIVEN COACHING PRIORITIZATION

While targeting professional coaching exclusively at key business leaders helps position coaching as a strong, positive message of the company's commitment to the individual, a drawback is that the strategy may also create demand from other executives who would like to receive similar benefits and investments. A key challenge is managing such requests in an appropriate manner. The Council recommends the following activities:

- Provide transparency around the rationale and selection process for executive coaching
- Explain decisions around professional coaching to business leaders who may not be eligible for such coaching
- Offer requesting individuals alternative strategies for further development, such as working with an internal coach or participating in a different high-potential program

PRACTICE BENEFITS: BUSINESS-DRIVEN COACHING

Members implementing business-driven coaching prioritization in their own organizations may reap the following benefits:

- ***Prioritization increases the likelihood of business returns on coaching***—While this practice on its own can be no guarantee for a high return on executive coaching, prioritizing coaching by business need is a critical pre-requisite for generating business-level impacts of the professional coaching engagements that organizations pay for.
- ***Optimized resource utilization spreads benefits while reducing risks***—Offering coaching to executives leading critical business initiative and who have a high likelihood of taking and sharing benefit from professional coaching optimizes the utilization of expensive coaching resources. Significantly, this approach reduces risk of failed or derailed coaching assignments as executives are evaluated for their (likely) receptivity to development through coaching.
- ***Selective coaching evolves into a powerful incentive for high-potential employees***—Coaching prioritized by business need and awarded to high-profile leaders in the organization quickly becomes a recognized investment in talent development. When coaching sends a strong message that the organization is investing in key talent, it can be leveraged as an incentive or even a non-cash benefit and retention tool for high-potential employees at the highest levels in the organization.
- ***Broaden the value of coaching*** -- Consider coupling executive coaching with a more scalable version of coaching for teams of middle managers within an executive's organization and/or strategic initiative. This helps to align coaching strategy, and drive value from coaching, at a deeper level in the organization

NOTE TO MEMBERS

The Continuous Learning Group works with processes for tying coaching to strategic business priorities and has worked closely with Hillenbrand to develop the foundation for much of the analysis profiled in this practice. Though not specifically endorsing The Continuous Learning Group or The Continuous Learning Group's work, members interested in additional information regarding The Continuous Learning Group are invited to contact:

The Continuous Learning Group, Inc. (CLG)  
500 Cherrington Corporate Center  
Pittsburgh, PA 15108  
412.269.7240 phone  
412.269.7247 fax  
sjacobs@clg.com  
[www.clg.com](http://www.clg.com)