

Feature Focus

Screening Executive Coaches: Standard Bank Reports on Their Ongoing Journey

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Coaching in South Africa, while in its infancy, is a rapidly growing profession. In the absence of universally accepted standards, companies wanting to hire coaches face a bewildering landscape of diversified qualifications, styles and experiences. Faced with this challenge, Standard Bank South Africa consulted i-coach academy to help them embark on a project to establish a coaching and assessment centre as a process for screening coaching. In *Coaching Matters* Edition Three, we reported that i-coach academy had been contracted to work with the Standard Bank.

Eighteen months later, Dr Helena Dolny, Director of the Leadership Development, Coaching and Mentoring Unit at Standard Bank shares the outcome of this project with *Coaching Matters*.

Background

Standard Bank has approximately 30,000 employees and operates in more than 20 countries. Until 2005, business unit autonomy to make choices in the arena of coaching and mentoring resulted in a hit and miss approach. We decided to introduce a screening process to create a pool of "accredited" coaches that any business unit could have confidence in.

Further decisions included not to hire one coaching company; not to favour one coaching methodology; to require certain minimal criteria in terms of years of coaching experience at an executive level and with evidence of continued professional development and supervision; and to expect coaches to engage with the line manager.

The Assessment Process

Electronic Questionnaire

This provided us with quantitative criteria but told us nothing about the style or quality of coaching.

Telephone Interview

i-coach academy suggested telephone interviews as an intermediary step prior to the assessment day. The telephone interviews provided a second filter to discern the coach's process, relationship to the client, preference for certain coaching assignments and any ethical dilemmas.

The Assessment Day

Following the initial screening, a selection of coaches were invited to work as a triad for the day. They were asked to prepare a presentation and to bring a real issue that they were willing to be coached on. There were generally three Standard Bank assessors and the day consisted of:

1. A company briefing on context
2. Presentations
3. Demonstrations
4. Debriefing opportunity.

By interacting with the coaches and watching them at work, we were able to assess their performance against key criteria and indicators that i-coach academy had developed.

For each criterion, i-coach academy had drawn up positive and negative indicators. For example to measure the coaches ability to build rapport, confidence, trust and respect with a client the following indicators were considered:

Positive Indicators: a sample:

- + Coach and client look relaxed and at ease;
- + Coach sets up session by making explicit confidentiality, time boundaries, what they can support with and what they cannot, agrees a way of working with the client;

+ Coach makes an effort to assess where the client is in order to effectively join with them

Negative Indicators: a sample

- Coach talks frequently in the session, interrupts and finishes client's sentences
- Coach is using negative body language (arms crossed, looking at watch)
- Coach assumes they understand what the client is saying without checking out language, meaning, restating etc;
- Coach disregards client agenda for the session
- Coach terminates session abruptly

Certain criteria were considered "show stoppers" and when it came to allocating scores, values for these criterions were doubled. The final total was then divided by the number of the criteria.

The guideline for scoring was as follows:

- +2 Demonstrated only positive behavioural indicators during the session
- +1 Demonstrated some behaviours which were positive indicators and some behaviours which were negative indicators on this criterion. Overall, demonstrated mainly positive behavioural indicators on this criterion
- 0 No evidence demonstrated
- 1 Demonstrated some behaviours which were positive indicators and some behaviours which were negative indicators of this criterion. Overall demonstrated mainly negative behaviours

Reflection

Almost 300 coach data questionnaires were processed in the first eighteen months of using the assessment. As the screening practice evolved we concluded:

(a) Some of the criteria was generally not observable on the assessment day e.g. boundary management.

(b) We began to add in additional criteria as they occurred - i.e. one coach used his body in quite an intimidating manner so we added to the body language criteria.

(c) We ran regular screening days with a core group of screeners but experienced more divergence in our scoring than desirable.

(d) It's taxing to both observe and record. The intent is to record as much and as accurately as possible because the integrity of the process depends on the accuracy of the observation and its recording. One suggestion has been to hire a speed typist/stenographer.

(e) We had a problem scoring zero. We felt that on some criteria - the absence of positive behaviours could not be considered as "neutral" but merited a minus score. Furthermore we wanted more distinction on the minus score so we decided to introduce -2.

(f) We observed that coaches that had "wide" but "thin" coaching specific training didn't perform as well as those that had undertaken a specific course over a longer period of time. We settled on wanting to hire coaches with at least 15 days training over a several month period on one specific course. Secondly, coaches with several executive coaching assignments under their belts excelled more easily in the presence criteria. We decide not to assess coaches with less than ten executive assignments. Thirdly we noticed that coaches who had at least a full year of coaching post completing their coaching specific training, more easily satisfied the criteria.

Revised Assessment Criteria

After 18 months of practice the following revised criteria was established.

i-coach Screening Criteria 2005		Standard Bank Screening Criteria 2007	
A	Self Presentation (self insight, self awareness, self belief) (model)	1	Self Presentation - Presence and Being (in the presentation)
B	Self Presentation (self insight, self awareness, self belief) (demo)	2	Self Presentation- Presence and Being (in the demo)
C	Boundary Management	3	Professional Standards: Contracting and Boundary Management
D	Work Standards		
E	Building Rapport	4	Building and Maintaining Rapport
F	Interpersonal Sensitivity		
G	Managing Emotions and Ambiguity		
H	Identifying Issues	5	Eliciting a Shared Understanding of the Coachee's Outcome
I	Flexibility	6	Flexibly Holding to the Client's Agenda
J	Clarity of Communication	7	Listening
		8	Questioning/Probing
K	Organisational and Environmental Sensitivity	9	Exploring the Systemic Implications
		10	Generating Sustainability
L	Building Capacity of Client to Coach Others and Self Coach	11	Building the Capacity to Self-Coach
		12	Congruence Between the Model and Demonstrated Practice

Revised Assessment Criteria Cont.

Self-Presentation

We distinguished between how coaches conducted themselves in terms of presence, diction and overall impression of their presentation of their model and their coaching demonstration. Some coaches were great speakers and did well in presenting themselves and their model (a public speaking attribute) but did not have coaching presence and vice versa. We needed to see both.

Boundary Management

Boundary management was combined with work standards and modified to include a shared understanding about coaching and how it differed from other helping professions as well as the coach's ability to share the fundamentals of their personal approach to coaching.

Building and Maintaining Rapport

Building and maintaining rapport was expanded to amalgamate three i-coach criteria - building rapport, interpersonal sensitivity and managing emotion and ambiguity. Building and maintaining rapport is one of the skills that many coaches have been unable to demonstrate at a high level. We observe rapport from different aspects; whether it is the pacing, tone and/or pitch of the coaching conversation.

Eliciting a Shared Understanding of the Coachee's Outcomes

Eliciting a shared understanding of the coachee's outcomes, was created to ensure that coaches do not single mindedly pursue coaching on the first symptom that is presented by the client, but that they engage

in exploration and clarification to ensure shared understanding as well as supporting the coaching conversation in getting to the heart of the matter. Several coaches who came through our process failed to explore what the underlying issue was.

Flexibility Holding to the Coachee's Agenda

Flexibly holding to the coachee's agenda was added because we noticed that as the coaching conversation progresses and new outcomes emerged for the client, some coaches insisted on taking the coachee back to their originally stated goals for the session.

Listening

Listening was created as a benchmark to ascertain the quality of what we consider to be the most important skill of the coach. The coach's quality of listening will be reflected in the crafting and choice of words in the questions, which should indicate respect for the coachee's choice of language and the meaning the chosen words hold for the client. We notice rapport being broken when coaches rephrase the coachee's choice of words. Listening also includes the coach providing appreciative attention whilst noticing changes in physiology, tonality, pacing and breathing. We also tried to observe whether the coach is listening for what is not being said.

Question-Probing

Questioning-probing including the coach's ability to ask relevant questions in relation to the coachee's outcome and questions which enabled the coachee to deepen their own awareness and reach new insights was added as an observation.

Building Capacity to Self-Coach

Building the capacity to self-coach was initially suggested as a show stopper but was later amended. The concept of the coach sharing some of the thinking behind their questions, techniques and other coaching elements so to enable clients to self-coach in the future was valued but inevitably proved unobservable in most sessions.

Exploring Systemic Implications

Exploring systemic implications and generating sustainability replaced organisational and environmental sensitivity. We wanted to emphasise systemic implications more clearly. With regard to the coaching topic, we want to observe whether or not the coach pursues a line of questions that invites the coachee to reflect on the systemic implications (work, team, family, role players, environment etc) of any decisions they are reaching.

Congruence Between the Coaching Model and Demonstrated Practice

We identified that coaches who have masterfully integrated their model into their style have coaching conversations where there is no obvious model informing their questioning. Yet during the debrief they can link the stages of their coaching conversation to their model. We have had difficulty with coaches using the descriptor "dancing in the moment" and not being able to link their line of questioning to their coaching model.

Testing the Revised Criteria

In April 2007, two of the original core group spent four days in London. The objective was to equip the London team to do the same coach assessment process as was being practiced in Johannesburg. We spent one thorough briefing day going through the process and the criteria. The next three days were spent screening. The person who will govern the process was present throughout, five others participated in rotation. The second round of screening took place several weeks later and this time the process was run by the London team with one person from South Africa providing support. In South Africa there have been three screening days using the new criteria.

Our observations are that:

- The revised criteria seem to be more easy to observe and record, and the quality of our data is improving
- There appears to be less variance between assessors than previously experienced.
- We have been able to maintain the quality of developmental feedback to coaches

What have the coaches said?

Most coaches have said that they have felt apprehensive about the day but that the atmosphere created by the assessors had contributed to them feeling more at ease than expected. Many have said that they enjoyed being able to listen to the presentations and observe the practice of other coaches and that this was a valuable exercise for them.

What have the coachees said?

The coachees have shared the following feedback with us:

- Knowing that the coaches have been professionally screened gives them a sense of confidence of making their choice in an unregulated environment.
- The process of having to shortlist a choice of three coaches is thought provoking. They are impressed

by the consistent quality that makes choosing difficult.

- The decision not to have coaches from one school of coaching means that they have to engage with the different approaches of the coaches which in itself is thought provoking.

Looking to the Future

The process described above has been a comprehensive and elaborate process. However, when we consider whether it has all been worth it, the answer is a resounding yes. We've empowered ourselves as professionally as we know how, in order to provide a process that's clear and transparent. It's true that perhaps some coaches come to the screening and adapt their style on the day to the style they know we prefer and then they behave differently in a coaching assignment - but the nature of the confidentiality of coaching is that we are unlikely to know this and must accept that we did the best that we could do at the outset.

We now have confidence about our hiring in an unregulated market and we believe we've designed our process to minimise our mistakes. It has been exacting, time consuming and therefore expensive. However as a larger company we can justify the expense with the results. In the future we will continue to use the screening process so that our coachees have variety as well as quality in making their choices.

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Developing a Screening Criteria

i-coach academy has significant experience working with organisations to help them to maximise the benefits of coaching in organisational and individual development. This includes working with organisations to develop individual screening criteria to ensure that coaches hired deliver on organisational objectives. We would be happy to talk to you further about how a screening process might be implemented in your organisation and how i-coach academy can work with you to develop this. Please contact us on +44 (0)207 317 1882.