

Welcome to this, the fourth of our Research Bulletins, our early Christmas present to you!

Christmas is of course a great opportunity to reflect on the events of the past year, and to get excited about the year ahead. It's certainly been an exciting year for Whyte & Coaches, and we are thrilled to announce the creation of the new 'Centre for Coaching' with Melbourne Business School/Mt Eliza. The formation of the new Centre will enable us to remain focussed on what we do best, and creates a platform for the next stage of our development, working closely with one of the world's top business schools to further develop coaching practices.

It's also been an exciting year for the coaching industry in general. As you probably know, a cross-disciplinary team, representing every stakeholder group, has been working hard all year to produce a draft set of Coaching Guidelines under the auspice of Standards Australia, a draft that is now ready to

distribute more widely for public consultation. We are very excited at the prospect of a common set of principles around which everyone in the industry can congregate to further develop the contribution of coaching to achieving success across our society.

Our Research Bulletins were a new initiative for 2010, and in the first Bulletin we reported the outcome of conversations with clients, their expectations of executive coaching, and hopes for coaching in the future. One theme emerging from that study was a desire for greater transparency in assessing the quality of coaches in what remains an unregulated industry. In this Bulletin we look at a related, but different subject, that of coach matching. How do we ensure we pick the right coach for the right assignment?

We hope you enjoy reading this Bulletin, and look forward to hearing your aspirations for 2011.

*Ann Whyte, Managing Director, & the Whyte & Co Guilds*

## Coach matching – art or science?

### Introduction

Coach matching is a challenge shared by coaching organisations and clients. We work closely with many of our clients to select the right coach for the right assignment. Some of the questions we get asked, which we ask of ourselves too, are questions like:

- How important is it that the coach has direct experience of the same industry and role as the coachee?
- Is it OK to just send coachees a list of potential coaches and ask them to pick their own?
- How can we be sure that a particular coach will be able to both build a good relationship, and challenge the coachee appropriately?
- Under what circumstances might you look for a coach with a psychology or counselling background?

In thinking about how to answer some of these questions, it struck us just how complex the process of coach matching really is. Is coach matching so complex that it is destined to always remain an art form? Or will we succeed in isolating what some of the key variables might be?

To begin our investigation we thought to stimulate a dialogue. We identified some seasoned practitioners, people who've been coach matching for years, and invited them to share experiences. Once we'd completed the discussion, we sent the transcript to two more practitioners for their comments and reflections. In turn we hope this Bulletin will stimulate further discussion among our community, yourselves included, that may advance thinking in this area.

We invited the following people to our initial discussion:

Ann Whyte, Managing Director,  
& the Whyte & Co Guilds

Peter Fitzgerald, Director,  
Executive Empowerment

Padraig O'Sullivan, Managing Director,  
Praesta Australia

Julie-Anne Tooth, Associate & Executive Coach,  
Institute of Executive Coaching

Kate Wisdom, Manager Partner Development,  
Blake Dawson

*Paul Lawrence, Executive Coach, Whyte & Co Guilds*

## Coach matching – art or science?

### The discussion

**Paul:** Welcome everyone. Let me start by asking what are some of the factors you take into account in selecting the right coaches?

**Kate:** I like to have a wide range of potential coaches in order to match well. I like to use psychologists for a lot of our people. They don't have to be practicing psychologists, but they need to have had some training, because most of our issues are people issues as opposed to technical issues. Sometimes we need people with an understanding of the legal environment, as it is a very strange environment. If I can't get the legal environment and the psychology, then I look for what's most relevant. A particular set of change skills for example, or, if my person was going to Asia, someone to take on more of a mentoring role. If a person needs a father figure, that is what I would seek out. I try to match the style of the person to the style of coach, and meet the underlying relationship need. It's pretty intuitive.

**Ann:** I used to pedantically offer a man and a woman, and still do sometimes. I might suggest senior women consider a senior man. My logic is that they often want a woman who they can relate to, but if you think of it – when you interview that person's CEO and their Chairman of the Board and their peers, they are nearly all men. If they have a man as a coach, the woman will receive further insight into how her male colleagues view her.

**Peter:** I find it's useful to share case studies with the client, examples of what different coaches have achieved and the approaches they use. The other word running around in my mind is chemistry. It's so important that the individual and the coach build a rapport very quickly. We usually have an introductory discussion where the participant can make the decision.

**Paul:** Chemistry is the most important thing?

**Padraig:** One of the biggest issues for me is that when it's coachees who make the call, it's the coaches who exhibit warmth in the first two minutes that get the gig. Organisations may ask us for three or four coaches, and we'll try and figure out who's got the appropriate skill set and experience. The problem is that coaches are selling a service and the coaches that are good at creating the initial chemistry are not necessarily the best coaches.

**Kate:** I agree. That is a real issue that I always keep an eye on.

**Peter:** Even when the chemistry is brilliant at the start, they may not be the best coach for the situation.

**Padraig:** The people with the best initial chemistry are most likely to get the jobs. The ones who do best are often those who engage very quickly in a warm manner and then challenge very quickly, leaving the coachee with a question to ponder. It's a sales skill, but some good coaches detest selling.

**Peter:** Some coaches have the skills to do the selling piece, but frankly many don't, and nor do we want them to.

**Ann:** There needs to be someone advocating the coaches who are the right match, not necessarily the obvious match. If we want to keep diversity in the market I think that's incredibly important.

**Kate:** Part of my role is to keep a watching eye on coaches who build relationships well, who try and build relationships through the partners. They are not necessarily good coaches. It's part of my role to run the quality control process, but it can be difficult.

**Paul:** Do you have to have been a CFO to coach a CFO? Do you have to have been a lawyer to coach someone in the legal profession?

**Padraig:** In my experience a CFO doesn't need a CFO to coach them. The biggest factor is whether the coach understands the context in which the coachee is working. Understanding the issues is imperative. Language is important too; one coachee chose a different coach because the one he really liked didn't understand the vernacular he used.

**Peter:** I agree with you – it enables the short circuiting of potential difficulties in communication.

**Ann:** Coaches who understand the nature of the role and the industry are able to go further faster, but further faster also brings risks. You can make mistakes based on dearly-held assumptions, be blinded to other possibilities. If you see only what you have experienced, then you may be subconsciously biased. I wonder if there are times when similar experience is necessary, and times when there is more value in talking to someone completely different?

**Kate:** Just because someone is a lawyer doesn't mean that they are going to be a good coach. It is a real balancing act. I don't have a hard and fast rule.

**Peter:** I think there is a balance. The skill of a really good coach is to challenge paradigms. Even if you have CFO experience, and are coaching a CFO, you must inform your approach to move outside the paradigm. A good coach can move across paradigms.

**Julie-Anne:** The industry in Australia has moved a long way. Chinese and Asian clients, particularly, still place a great emphasis on the coach's experience and technical knowledge, whereas in the Australian market, one doesn't have to be an expert in the legal profession to coach a lawyer, for example. Some of the literature says you need to be a CFO to coach a CFO but then you read the psychology literature which says to be a good coach you need to be a psychologist. Literature that says you need a CFO to coach a CFO is often written by someone coming from a business background, and literature that says you need a psychologist is often written by a psychologist.

**Paul:** How often do you get coach matching wrong? And when you get it 'right', how do you know if it couldn't have been 'more' right?

**Peter:** We know when we get it really wrong, but I don't think Paul's question about whether we could have made it better can really be answered. Where it has gone wrong it's usually because coaching wasn't the right intervention for the person.

**Kate:** It goes wrong when the person has been basically told they have to have coaching. Also, coaching can get off track if a psychological dependency starts to be formed. Then I will not renew the contract.

**Peter:** One of the key things is to know when it's time to quit. We as coaches may want to keep going, to make a difference.

**Ann:** We are very tough on that one. The research says it can be a problem. Coachees can have extensions, however they must go through the contracting process again.

**Kate:** Yes, your model and mine are similar.

**Julie-Anne:** The only other example I can think of coach matching going wrong is when there's a hidden agenda. We rely upon the coach to identify it.

**Ann:** If I see a coach going to an area of their own strength, which I know is a pattern, I'll quiz them about the assignment and make sure their approach is in the best interest of the coachee. When we started there wasn't peer review as there is now. Now all top coaches have peer review in place, such that coach matching becomes less important. We can step back a bit because the coaches have stepped up.

**Kate:** I worry about supervision, especially sole providers. You need to make sure the coach does not only do the nice bits or the bits that they want to do, but that they are meeting the client's needs

**Paul:** How does the matching process work in organisations where you have coaching panels?

**Padraig:** Some are fantastic, some are woeful. Some have two day assessment centres in which they are clear about what they're looking for, and they are brilliant. Everyone learns a huge amount, whether they are on the panel or not. At the other extreme it can be dreadful, when one part of the organisation is trying to make a stand so that they can control coaching within their organisation. Done poorly, panels can cut across the processes that we are talking about and affect how coaches are being matched with clients.

**Paul:** How have things changed over the years?

**Ann:** Some of our early clients were sophisticated organisations that had been buying coaching for a long time. My role was to help them clarify their thoughts, because often they didn't have a confidential sounding board to do that. Then I'd think carefully about the best fit.

**Paul:** So what's changed since then?

**Ann:** Two things. Firstly, some of our clients have got to know our coaches well and they make the choice. Sometimes both the coach and I are a bit like – oops! – I'm not sure that's the choice I would have made. In that scenario I may work backwards with the client, absolutely respectfully, and make sure that the right choice is made. We would rather spend time up front getting the match right, because it drives standards and the quality of coaching. So I'm sometimes troubled by hasty decision-making by clients who feel they know the coaches, when technically they may not. Also they may not know our new coaches, and so they will keep using the same favourites. Having said that, clients have become knowledgeable and they do get it right.

**Paul:** What's the second thing?

**Ann:** The other nice trend I've seen is a maturing of client's understandings of the values of different disciplines. Psychotherapy for example, and its enormous contribution to group coaching as well as individual coaching, and the maturing of psychologist coaches to be more articulate about what they can do.

**Paul:** Any final comments or stories to share?

**Julie-Anne:** For me this conversation has helped me to reflect on the complexity of coach matching and the importance of the reflective conversation around it. What's important is the dialogue and relationship between client and the coaches.

**Peter:** For me the matching process doesn't have to be absolutely perfect as long as the coach has the flexibility to move the assignment. As the industry matures I think that we are well placed to do that.

**Kate:** I think it's hard to guarantee the matching, but I'm also wondering – how much do I really care? If the coachee turns up to sessions and the coaching is beneficial – then I'm really happy.

**Padraig:** In my view the key risk that remains that the best salesman get the assignment rather than the best coach. As Ann said, there needs to be someone advocating the best match.

**Ann:** On one of our assignments, one of the coachees punched a supplier in a pub and was sacked. Both his coach and his company suggested the coaching had been a failure, but the coachee said "Mate, I would be in jail if I hadn't been coached. I was going to kill that man. If you had not taught me about anger and impulse control, he'd be dead."

**Paul:** And on that note – thank you all!

## Commentaries



**Robyn McKenzie**

General Manager  
National Sales  
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Perpetual

At Perpetual, we run two 12 month leadership development programs for Executive and Senior Leaders. Coaching is an important component of both programs, and has always been rated highly by both participants and their managers. The coach matching is a *scientific* process. We run a 2 day development centre, where participants complete a series of exercises, including a 360 review. We give them feedback based on a competency framework, which participants use to create their own development plan. The uncovered competency needs are then taken into consideration in choosing a coach. We have invested a lot of time in developing a very close working relationship with our coaching company. We invest considerable time discussing the merits of each coach and matching them with participants. Matching the right coach with the right coachee is critical in enabling best outcomes.



**Rilla Moore**

(until recently)  
Executive General Manager,  
Human Resources,  
Stockland

Coaching is both an art and a science, and coach matching is akin to matchmaking. Getting the right match is nigh on impossible if the development needs of the candidate have not been clearly articulated and agreed by the individual and their boss. HR will often be involved. All parties need to agree on desired outcomes and timeframes. The experience and wisdom of the coach are both important, but the coach doesn't have to have the same level of functional expertise as the coachee, unless the gap is technical. Sometimes an early judgment needs to be made as to whether a potential coach needs to be a psychologist or psychotherapist. The chemistry between coach and coachee is important, though not to the extent a friendship or dependency forms. The most effective coaches have a small ego and the ability to probe and listen. They are able to deliver tough messages, tempered with warmth and encouragement. It goes without saying that the most effective coaches plan for, and measure, specific outcomes, and have the courage to conclude an assignment early if it isn't going to be successful.