

Internal coaches contracting conversation guidance

Purpose of this document

Various members of the EMCC have collaborated to develop guidance on the key ingredients of a good contracting conversation when internal coaches are engaging with their clients (either verbally or written).

The primary audience is heads of coaching in organisations who are setting up or leading internal coaching programmes. The guidance is not intended to be prescriptive, more to act as the basis for a conversation between the head of coaching and their coaches – to ensure that they are covering the ground – but we intend it to be of value for internal coaches themselves too, their clients and their clients' line managers.

Part One: Roles and responsibilities

If the coaching relationship is to be a success, there needs to be clarity and agreement about the overall purpose of the coaching, the obligations of the coach, the client and, often, the line manager or 'sponsor'. The following suggestions are not intended to be prescriptive but are the sorts of things that could be covered.

Coach's obligations

Helping the client to formulate coaching goals or intentions

Supporting and challenging the client appropriately

Managing the process e.g. time, number and duration of meetings

Helping the client to work things out for themselves and learn from this

Helping the client to explore what support they need and how/where to find it beyond the coaching relationship

Helping the client to explore options – the advantages/disadvantages of different courses of action

Inviting the client to reflect on past experiences with the intention of extracting learning from them and exploring how the learning occurred, so they can do it in other circumstances

Asking questions to help the client to explore issues more deeply

Active listening

Being honest and open in conversations

Giving constructive feedback as and when appropriate and agreed

Supporting the client in identifying specific actions and a way forward in order to meet their development needs

Holding the client to account for agreed actions – exploring when the client doesn't complete actions: what are the reasons?

Being alert to the multiparty nature of the coaching relationship and the need to balance the different interests of the client, the sponsor and the organisation – who will decide on this balance? Will there be discussion/agreement on this?

Being alert to the potential for a conflict of interests of either a professional (e.g. client and coach in competition for promotion) or emotional (e.g. coach being a friend of someone whom the client wants to talk about) nature arising through the coaching relationship – agreeing under what circumstances the coaching agreement will end (instigated by either party)

Coaching client's obligations

Thinking about what they would like to explore during the meetings and preparing for them

Being honest and open in the conversations

Taking responsibility for their learning and development

Capturing learning e.g. note-taking during the meetings

Reflecting between meetings

Carrying through actions that they have committed to – willingness to explore the reasons if not carried through

Providing feedback to the coach

Line manager/sponsor's obligations

Involvement in the goal setting

Being honest about any changes they are expecting to see (but avoiding references to the client's personality as opposed to their behaviours)

Being as clear as possible about what success/effectiveness would look like

Taking responsibility for giving the client regular, constructive feedback and being mindful of their role in supporting the client's development

Confidentiality

This is a prerequisite if honest and open dialogue is to take place. Explain to the client what is included in the confidentiality agreement e.g. what would the consequences be of a potential breach of the organisation's disciplinary code? Is there a form of words provided by the organisation that all its internal coaches are expected to abide by? Is the very fact that you are coaching that individual to be regarded as confidential information in itself?

As a rule of thumb, you should disclose information only where it has been explicitly agreed with the client and sponsor, unless you believe that there is convincing evidence of serious danger to the client, others or the organisation.

Explain how some issues raised in meetings may be taken to supervision and what the confidentiality implications of that will be (particularly if the supervisor is also internal or is the person responsible for the coaching scheme). If it is group supervision with other internal coaches from the same organisation, think about how client confidentiality will be maintained and explain that. Also, if in your organisation, coaches are periodically asked to feed back – unattributably – themes that have arisen in their coaching sessions that could contribute to organisational learning, explain that to the client too.

Explain whether you will be taking any notes and, if so, how and where they will be stored (and for how long they will be kept).

Establish if they are happy to be communicated with between sessions using the work email system e.g. if anyone else has access to their in-box.

Boundaries

As the coach, you are responsible for managing the boundaries between your professional role in the organisation and the assignments you take on as an internal coach. Explain that internal coaches can sometimes find themselves privy to information about their clients through their organisational role and work relationships and how you will be dealing with that.

Discuss the areas that the client wants to explore, how these relate to their development, and how they fit into the coaching brief. Identify, and decide how to approach, any issues that might be on the borderline of what the sponsor would consider appropriate e.g. exploration of childhood/family experiences; difficult personal relationships which may be having an impact on the client's performance; help with an application/interview for a role elsewhere in the organisation.

Explain how you will always be alert to your own competence as a coach and the circumstances in which you will refer your client to other sources of support. Ensure that you are familiar with the process within the organisation for doing this e.g. employee assistance programme or occupational health section. Or will you be expected to rely on your own network of professionals?

Global Code of Ethics/Complaints process

Provide the client with a copy of the EMCC (or other professional coaching body) Global Code of Ethics and ensure the client has read it and understands the complaints process. Ensure that they know whom they can contact within the organisation if they are unhappy about anything arising from the coaching relationship.

Is a coach related complaint aligned with or connected to your organisation's complaints procedure? Who will respond internally to a coachee's complaint? How will this be managed?

Part Two: The process

This part is about how the coach and client plan to work together and also provides an opportunity for the coach to explain their approach to coaching e.g. Is any particular model favoured? Is there a 360 degree feedback tool that the organisation commonly uses which will be deployed? Will any psychometrics be used?

Three-way meeting with coach, client and client's line manager/sponsor

This optional meeting should ensure a common understanding of the purpose of the coaching; the roles and responsibilities of the different parties, the coaching goals and what success will look like. There may be public and private goals e.g. some goals agreed with the line manager /sponsor and others that are agreed just between the coach and client. It is common, for example, for the client to want to do some work on their relationship with their line manager but may not want to be explicit about that. At this meeting, it should be agreed what, if any, feedback will be given by the coach to the line manager/sponsor.

Coaching approach

Describe your coaching approach and support the client in understanding the process. Explain and agree the value of a directive/non-directive coaching process. The intention is to help the client think and explore a topic for themselves rather than you give 'advice'. You may agree to challenge assumptions and any pre- conceptions or barriers, and create a safe place to explore/reflect. Explain that you will be offering both support and challenge.

Agree how you will co-manage goals and explore the impact of explicit and implicit goals. Discuss with whom, if anyone, do the goals get shared. Agree how you will measure progress against the goals. Establish what role, if any, the client's line manager or sponsor will have. How will these be connected, if at all, with performance development/appraisal process?

Explain how, and if, you will use appropriate and relevant psychometrics or a 360 feedback instrument.