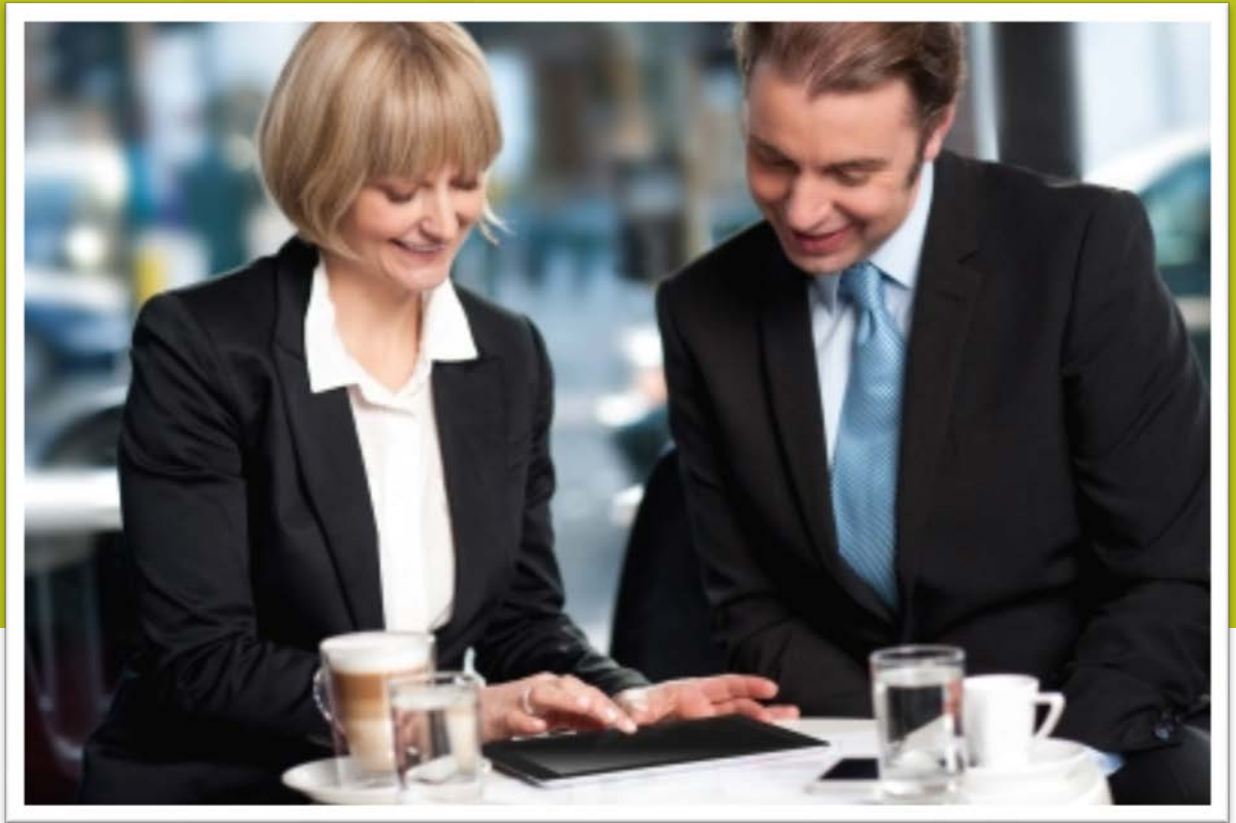


Barbara Stewart, PCC, CFP®

# What to Consider When Hiring a Coach

Your questions answered



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# Letter from the Author

**T**his book was created to help you better understand the things you need to consider when hiring a coach. What we call a “professional coach” or “coaching” in this book is an often misunderstood and misused word, as you will soon learn.

Understanding what a coach does and what coaching can and cannot do for you is key when hiring a coach. Working with a coach requires an investment of resources, namely time and money. While you can earn back the money, you cannot regain the time.

Our objective in providing this book is to arm you with the knowledge and resources, so you benefit from your engagement with a coach. Working with a professional coach can be an experience that yields positive results and **a return of and on your investment.**

Sit back, grab a highlighter (or the electronic version thereof) and prepare yourself for the life changing experience that can come from professional coaching.

*Barbara Stewart*

# Stuck...simply stuck

You've come to a point where you are just simply stuck. Things aren't working for you, and a vague sense of dissatisfaction creeps in during those few quiet moments when you have time to reflect. Too big and nebulous of an issue to deal with, you change the subject in your head and move on.

## I was too...stuck!

This is exactly where I was in early 2008, happy and successful in my career until I said out loud "I don't think I can do this for another 20 years," which quickly became "I don't think I can do this another 5 years." Once voiced, I could no longer silence or ignore what my mind, body and soul were telling me. There was more for me to give, and I needed to figure out what that was. But how?

Having selected a career and charted a course to help people reach their goals through financial planning, what else could I do? Where could I go? After 20 years in a professional career, did this mean starting over? How? Could I get out of my own head and look at things objectively? Would I be able to ask myself the tough questions that would move me forward? I didn't have a clue.

Somehow I found myself attending the local Houston Coaches meeting. A coach for financial advisors was speaking, and that was a great place to start. It was a start but not the answer, and for the next six months, my quest went through fits and starts. I didn't know what I was looking for.

*Would I be able to ask myself the tough questions that would move me forward? I didn't have a clue.*



A conversation with the CEO of my organization provided the answer. Frustrated, yet confident enough in my relationship, I shared with him this feeling of restlessness and my desire to make more of my career. He was supportive and shared some ideas, but it wasn't until I asked about working with a coach that his eyes lit up. He knew just the person and thought it was a great way for me to explore what was at the heart of my unease and find some answers.

At the time, I did not know what coaching truly meant and what the outcome would be. I knew only that I needed help getting out of my head and out of my own way in order to move forward. Excited and nervous, I made that first call.

# What Is Your Challenge?



How I came to work with a coach is how it happens for many people, IF they feel comfortable asking. Sharing with a friend, colleague or perhaps a boss that you would like some support around life or business decisions requires trust in the other person and guts on your part.

Eight years after my initial search, coaching has continued to grow as a profession, and more and more people are at least familiar with the concept or have worked with a coach. Asking for a referral to a coach is easier, but will it get you to the person you need and who can truly help you? Quite possibly, no.

Much like the financial planning profession in its early years, a great deal of misinformation exists around coaching. For the individual or business considering coaching, there are plenty of people who claim to be a coach.

The professional coaching business is self-regulated, and as such, anyone can print a business card and say they are a coach. So how do you know if the “coach” you are considering will be the right fit? How do you find a professional coach? Where and what do you look for? How important is experience? How about training and credentials? Should they have experience in your field? This is quickly becoming more work than it is worth, because you know there is a fee to be paid. Surely you can just figure this out on your own.

There you are back at square one. Give me a bit of your time, and I will help answer these questions and provide you with resources to get the support you need. Let’s start with the most important question...what type of challenge are you trying to solve?

# What Is Your Challenge?

1. I need to fix problems in my systems and processes.
2. My staff needs to be better at \_\_\_\_\_ (sales, excel spreadsheets or industry developments).
3. A physical or emotional trauma prevents me from functioning.
4. My spouse and I are wrestling over how to best parent.
5. My team is \_\_\_\_\_ (becoming siloed, ineffective at communication, not supportive of each other or the organization).
6. I can't seem to \_\_\_\_\_ (exercise, eat right, be on time, be a supportive friend or spouse).
7. I am stuck and not sure how to move forward.

This is not an exhaustive list of challenges you might be facing, but it captures three different types of support you might need.

Challenge **1 and 2** represent issues that a **consultant or trainer** could address. Either will analyze the situation and recommend a specific course of action based on their expertise. As part of their role once hired, the trainer will deliver the training services. Many consultants provide recommendations, including action steps, but may or may not help the client implement what is recommended.

Challenge **3 and 4** are best suited for a **counselor or therapist**. When basic daily functions are limited by pain, trauma, or emotional or physical issues, an individual specifically trained in overcoming these issues is recommended. You might see a physical therapist, a licensed counselor, a psychologist or a marriage and family counselor. Issues like these must be resolved before you are able to move forward.

Challenges **5 through 7** can be addressed by a **professional coach**. The coach will help you define the objective for the work together, identify the current issues, and partner with you to develop a plan to reach the objective. The coach will also support you (and the team if applicable) in putting the plan into action. While a coach won't do the work for you, they will be your support system for getting what you decide done! Look for a coach with experience in moving clients forward in situations similar to yours.

The International Coaching Federation (ICF), the most globally recognized credentialing organization for coaches, provides additional resources on this topic in their [Coaching FAQ's](#).

# Who Can Help?

Since you have read this far, let's assume coaching is the answer to your challenge. Now, who is best positioned to help you? As you will see below, identifying that a coach is best positioned to help you is not the final answer to who can help.

- **As I sat across the desk from a new acquaintance, he shared that he meets coaches all the time in his networking activities.**
- **As I sat across the table from a prospective client, she shared that their firm had worked with coaches for several years, and she appreciated the value they brought to the employees.**
- **As we sat in the coffee shop, he shared that he had a coach previously, a mentor that had helped him get where he is today.**

With all three of these conversations, what these individuals had in common was that none had ever worked with or known a professional coach. Yet all of them had known or met coaches. How could this be?

## Anyone can call themselves a coach

A life coach, a financial coach, a relationship coach and a business coach can all claim the moniker. Yet, which of these would be best positioned to help you get from where you are to where you want to be? Are you confused? Rightfully so.

Start with the basics: the definition of coaching.

*The International Coaching Federation (ICF) defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.*

Why choose that organization and their definition of coaching?

- The International Coaching Federation is the world's largest organization of professionally trained coaches.
- The ICF accredits programs that deliver coach training. They do not offer coach training.
- Membership in the ICF is restricted to those who have completed at least 60 hours of coach-specific training that meets ICF standards.
- The ICF Credential is the only globally recognized professional coaching certification.

What does this mean to you? By focusing your search on ICF credentialed coaches, you know that:



# Why an ICF Credentialed Coach?

	<u>Associate Certified Coach (ACC)</u>	<u>Professional Certified Coach (PCC)</u>	<u>Master Certified Coach (MCC)</u>
<b>Training Hours Completed</b>	60+	125+	200+
<b>Coaching Hours Required</b>	100+ hours following the start of training	500+ hours following the start of training	2,500+ hours
<b>Core Competency Knowledge</b>	Confirmed by: 10 hours of Mentor Coaching; performance evaluation; and written exam	Confirmed by: 10 hours of Mentor Coaching; performance evaluation; and written exam	Confirmed by: 10 hours of Mentor Coaching; performance evaluation; and written exam
<b>Code of Ethics</b>	Required	Required	Required
<b>Continuing education</b>	40 hours every 3 years to maintain credential plus 10 hours mentor coaching	40 hours every 3 years to maintain credential	40 hours every 3 years to maintain credential

What does this mean to you? By focusing your search on ICF credentialed coaches, you know that the coach has invested far more than a weekend in their development as a coach. Regardless of whether they call themselves a life coach, a financial coach, a relationship coach or a business coach, they have the training to help you achieve.

Should this be important to you? Is it the only criteria? No, it doesn't have to be. There are good coaches who coached many years prior to the development of the credentialing process. Are you likely to get good results from them? Quite possibly.

But since there are now standards and formal training, wouldn't you want to partner with someone who possesses the knowledge and experience to help you maximize your personal and professional potential?

[Find an ICF credentialed coach](#)



# What to Expect

A professional coach is more than just a description on a business card. For those who have invested in the process, it represents a reputation and a set of standards that clients can expect. Not everyone who claims the moniker of coach will go through the process to earn a credential. As a consumer, you should know what to expect. With or without the credential, here are the standards and where the bar has been set.

Expect a professional coach to demonstrate competency in the areas described below. The [International Coach Federation \(ICF\)](#) developed these eleven core coaching competencies to support greater understanding about the skills and approaches used within today's coaching profession. They are the foundation for the [ICF Coach Knowledge Assessment \(CKA\)](#) and are the backbone of any accredited coach-training program. Use these to help you understand the coaching relationship and to select your coaching partner, credentialed or not.

## Setting the Foundation

1. Meeting Ethical Guidelines and Professional Standards
2. Establishing the Coaching Agreement

## Co-Creating the Relationship

3. Establishing Trust and Intimacy with the Client
4. Coaching Presence

## Communicating Effectively

5. Active Listening
6. Powerful Questioning
7. Direct Communication

## Facilitating Learning and Results

8. Creating Awareness
9. Designing Actions
10. Planning and Goal Setting
11. Managing Progress and Accountability



I would encourage you to explore the meanings of each of these [in-depth on the ICF website](#). There is more to these abbreviated descriptions than meets the eye. How do these competencies impact you as a consumer of coaching services, either individually or as an organization?

# What To Expect?

## More than You Expect

One of the most powerful aspects of coach training under an ICF-accredited program is the mentor coaching requirement. It applies to every ICF credential, meaning a coach must be mentored and effectively demonstrate their coaching skills over the many years it takes to earn the credentials.

Mentoring requires that a mentor coach, at a credential level higher than yours, listens to and provides feedback on your coaching sessions with multiple clients. Willing clients must agree to have a coaching session recorded for the specific purpose of mentoring and feedback.

While daunting to ask of clients, each person I asked was more than willing to have the session recorded and was delighted to help in my professional development. These mentoring reviews and coaching sessions with my mentor coach were, in my humble view, the most valuable aspect of the coach training. Where else, and how else, do you get feedback on the effectiveness of your coaching skills? How many other professions provide such direct mentoring?

Both the book and classroom learning allowed me to know and understand the competencies. Mentor coaching let me apply and learn the competencies for the benefit of my client and me. Wouldn't you want this level of experience and training in your coach? Use the [Credentialed Coach Finder](#) on the ICF Global website to find your coach.

# The Search

Specialization is essential in our wired world today. We “google” to discover if something exists and to remember those facts that escape our memory. Searching for a coach can be accomplished in the same way. But googling leaves us at the mercy of search algorithms, paid advertising and word confusion. Did you want a sports coach, a financial coach, a coach for weight loss, a coach for personal and professional growth or a Coach handbag? A simple search won’t serve us; we need context and refinement to discover what we seek.

In order to be found and to effectively serve their clients, many coaches specialize in an area or type of coaching. They may be a relationship coach, a leadership coach, a coach to business owners, a coach for women executives, a coach for Moms returning to the workforce or a coach for those transitioning into retirement.

Other coaches bring a philosophy based on the teachings of a specific person or organization, such as the John C. Maxwell certification program or Brian Tracy’s FocalPoint Business Coach. These specializations can muddy the waters for you as a consumer. You see a certification and the word “coach” and think it means the person has trained as a coach. Maybe so, but more than likely, probably not.

“Coach”, as used above, differs significantly from being a **credentialed** coach by the International Coach Federation (ICF). The ICF coach training teaches the body of knowledge that gives a coach the know-how to build an effective co-creative partnership with clients. What is “coached” or worked on could be anything!

If I haven’t made the case enough already, begin your search with a focus on [coaches credentialed by the International Coach Federation](#). Thus, you know that any coaches you identify as a potential fit have the training, coaching, and mentoring to establish [an effective and productive coaching relationship](#) with you. From this list of potential coaches, you can then continue to narrow your focus to find just the right fit.

## When is a coach not a coach?

*I could be a perfect example of just this confusion, as I am a [Gallup-Certified Strengths Coach](#). There it is; that word “coach.” If Gallup’s certification program was all I had completed, you would be mistaken in thinking that I am a professional coach. Yes, I am trained and have a deep understanding of the research and study behind the Clifton StrengthsFinder® Assessment. Yes, I must maintain that certification with continuing education. All this should tell you is I am well-versed in the use of **strengths as a tool** to help clients grow professionally and personally.*

*With the knowledge of how to coach from the ICF, I can then use the tools that fit the client’s particular needs. The Clifton StrengthsFinder® Assessment or the Personal Coaching Styles Inventory are two tools in which I am certified. Or it could be the tools I’ve personally created for my clients, such as the [Ideal Client workbook](#), that are best suited for that particular client.*

# The Right Fit

How do you find the right coach for you?

Considering that you have:

1. Identified the type of challenge you are trying to solve.
2. Determined that you are ready for outside input, change, and forward movement.
3. Narrowed the field to professionally trained coaches – [Start here](#).

Now it is about fit. Here are some things you will want to consider.

## **Is it important that the coach have experience in your field or industry?**

There is not a right or wrong answer to this question, however, keep in mind why you are hiring a coach. It is to have a partner that can bring out the best in you. You are hiring a coach, not a consultant. Make sure you have correctly identified the challenge you are trying to solve (point 1 above) and the type of service best suited to support you. If you need help clarifying the challenge you are trying to solve, [head back to page 6](#) where the differences between consulting, therapy and coaching are outlined.

A coach with experience in your field or industry, whether coaching others in the same field or having actually worked in the area themselves, can bring an added depth of understanding to your circumstances and environment. They may also be able to share (without identifying information) stories and insights from other clients in similar situations.

My recommendation is to not limit yourself to just coaches with experience in your field or industry. Rather, consider that if a coach meets all other relevant criteria (see below), that field or industry experience is a bonus.

## **How do you want to be coached?**

You must decide if you want to be coached in-person, via telephone or video call. There is no right answer here; there is only your preference and geographical limitations.

Thousands of top executives are coached virtually and may never meet their coach face-to-face. What matters is the ability of the coach and client to connect.

You can expand your search by being open to telephone or video call coaching.

You can narrow your search by working only with a coach you have the opportunity to meet in person at least once.

## **What other resources does the coach offer?**

The hiring of a coach may be just the beginning of the process for you. As a business owner or manager, you may need a coach that can not only support you but also offers support to those around you. Team workshops, group coaching and online or virtual offerings enhance the value a coach can provide. The partnership can evolve from just one-on-one to helping your entire team or organization become greater.

# The Right Fit

## The Big Question

### How do I feel with this person?

While you may enter a coaching relationship with a focus on your business or career, you cannot separate who you are as a person from what you are working on or who you are working to become. You will need to trust your coach to create a safe space for you to share things you may have never thought you would share with another person. Growth and change occur when we can be vulnerable with ourselves and with another person sharing, among other things, what scares you most and what excites you beyond compare.

Many professional coaches offer a [complimentary coaching session](#) to those interested and who meet certain criteria. This is a great way to “try on” coaching as well as “trying on” a particular coach. Remember that coaching is a collaborative partnership, and it won’t work well if both parties, client and coach, aren’t comfortable in the relationship.

Much like dating or hiring any other professional, you need to feel a level of comfort and trust - a rapport. Yes, a coach can be the one to challenge you and kick you in the pants, yet they can only serve you effectively if there is a true partnership. The definition of coaching is a co-creative relationship between a client and a coach that serves to transition you - the client – from where you are to where you want to be. Let coaching be the catalyst for you to soar to greater heights!

# The Right Fit

## Are you “great client” material?

### The coach’s turn to evaluate

Just as there are questions to be asked of a coach in the hiring process, there are also questions a professional coach will consider when deciding to take on a client. Do you have the potential to be a great client? Here is what you need to know about how you will be evaluated.

#### 1. Why

Why do you seek the services of a coach? You may be crystal-clear that “in order to grow your business, you need to be able to communicate your vision and get the team all rowing in the same direction.” Awesome! Let’s get started...given that you successfully address the remaining questions!

It is also perfectly fine to be far less clear and unable to put your finger on the exact reason why. Stumbling, bumbling and looking for the right words are signs you are too close to the issue and need outside input. Professional coaches are trained to listen for “the why” and to ask questions to help you articulate it.

Before engaging, ask for a single session to gauge the coach’s ability to help you define “the why.” Most coaches offer a [complimentary or exploratory session](#). Remember, they are looking for a great client. Probing questions and great listening skills will be your clues. If specific advice is given, then run...unless you are looking for a consultant. [What Challenge are You Trying to Solve?](#) will help you distinguish the different types of professional services.

#### 2. What

What specifically do you want as an outcome from coaching? Are you wanting to advance your career, grow your business, develop stronger relationships with family, find time for you. Any, all and more of these are outcomes to work toward with a coach. A great coach will help you prioritize that laundry list and will likely deliver positive outcomes you couldn’t even begin to imagine.

#### 3. How

How have you attempted to accomplish “the what” in the past? What has been the outcome? Maybe you haven’t done “the what” before and you recognize that what got you where you are won’t get you where you want to be! A new skill set is needed and you are not even sure what it is. A professional coach will be able to share stories (no identifying information) of how they have helped others in similar situations.



# The Right Fit

## Are you “great client” material?

### The coach’s turn to evaluate

#### 4. Preparation

How have you prepared for the work involved? Have you budgeted for the monetary expense and the time? The services of a proven, experienced and credentialed coach will require that you commit money and time. One without the other is a recipe for a less-than ideal outcome. The coach will be crystal-clear about both and able to suggest alternatives if you can’t meet the terms.

#### 5. Mindset

Are you open to new ideas and differing viewpoints? Are you willing to set aside the excuses of the past and stop living in a “story”? Can you take “but...” out of your vocabulary? Are you willing to answer tough questions and can you be vulnerable with another person? Can you recognize and celebrate the many steps it will take to get you where you want to be?

Your initial conversation with a coach is not just about whether you will hire them. You are also being evaluated on your ability to be a great client. Coaching is creating a partnership and both parties need to be willing, able and eager to enter into that agreement.

Are you ready for coaching?

LET’S GET STARTED



# Begin with the End in Mind

## How to end a coaching relationship

“Begin with the end in mind” is a well-known Stephen Covey quote you want to keep in mind when hiring a coach. Not knowing how to end a coaching relationship can cause some to never enter one. I have yet to work with a coach with whom I didn’t share a personal connection. It often makes the “fit” in the relationship and a more powerful coaching experience. Yet it might not be one you want to continue indefinitely. How will you know when it is time to move forward from a coaching relationship? How long is a coaching relationship and does it have to end?

As referenced in the section [“Are You Great Client Material?”](#) it is important that you are clear why you seek the services of a professional coach.

1. The coach needs to know why you seek their services, so they can help determine fit.
2. More importantly, you need to know the specific professional service you seek. Is it coaching, counseling, or consulting? Find an explanation of these differences [here](#).
3. Defining why you seek the services of a professional coach will determine the outcomes you are working to achieve. It provides a way to measure results. Did you get what you came for in the work with the coach?

Sometimes “the why” and the outcome you want to achieve are fuzzy at best in the beginning. A coach can help with clarity, identifying purpose and putting direction to your actions. This might be just why you need a coach. You may also be very clear about your outcome, yet know you need support and accountability to help you get there

So how do you know when to end it? How do you do so?

## Begin with the End in Mind

1. **Clearly defined outcomes will provide a measuring stick for results. If you've gotten what you came for and are confident in your next steps or maintaining the results, it could be time to end the engagement. Share this with the coach, and set the stage for maintenance sessions or resuming when needed.**
2. **Clearly defined outcomes will provide a measuring stick for results. If you HAVEN'T gotten what you came for (and you were an engaged and willing client) it could be time to end the relationship. Express your concern, consider the coach's response, and decide to stay or move on.**
3. **When progress stalls and you are not ready to address the reason, it could be time for a break. There are times to pause, digest and work on the progress made before you move forward again. Share this with the coach and set the stage for maintenance sessions or resuming when needed.**
4. **Any time the relationship with the coach is not working, it could be time for an end. Raise the issue with your coach, let them know what's not working and see if a change can be made. If not, move on.**

There can be other circumstances that bring an end to a coaching relationship. Yet I have found that clients are more challenged to end a relationship when things have gone well rather than not. And no, the relationship does not have to end. You can continue as friends, if the coaching need has been addressed. Or you may find that the coaching relationship continues to evolve as you evolve. Business owner clients often find that an ongoing coaching relationship supports them as they grow as leaders, allowing the coaching to ripple through their organization and their personal lives.

Begin with the end in mind. It provides a measuring point and a touchstone for your next step.

# What Is Your Next Step?

You are ready! You have addressed the top considerations and questions when hiring a coach.

Now what will be your next step?

1. Carefully file this away for future reference.
2. Share it with your spouse, significant other, son, daughter, or boss who could benefit from this.
3. Start the search for professionally trained coaches, or...
4. Click the “Let’s Get Started” link below

LET’S GET STARTED

Clicking the “Let’s Get Started” link will take you to a form where you will share some basic information with us about your challenge (see page 6) and what you would like to get out of coaching. We will then contact you to schedule a COMPLIMENTARY 30 minute coaching session.

Yes, you get to try on coaching, and see if it and we are a fit for you!

*(Clicking the Let’s Get Started button above will not cause this e-book to self-destruct or add your name to some obscure email list with no way to unsubscribe...aaargh!)*

*Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.*

**Resources:**

[Benefits of Coaching](#)

[Hiring Tips](#)

[Credentialed Coach Finder](#)



**Barbara Stewart**

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Barbara Stewart is the founder of Accelus Partners, LLC based in Houston, Texas. As a coach and speaker, Barbara works with the owners and leaders of small and mid-sized firms on business strategy and team development using a strengths-based approach. A focus on professional and personal development allows her to support business leaders as they take their companies, employees and themselves from good to great.



## *Real People Real Results*

Barbara and I closed every call with specific management tools and “to do’s” to achieve the short and long-term goals. We made our deadline, created work that made us all proud, strengthened our team, and accomplished more than we ever thought possible.

Linda Shirkey

Owner, The Advisor’s Resource, Inc.

I was having difficulty thinking strategically about my future due to a multitude of unresolved issues. I gave little thought to how I wanted my life to be both now and in the future. Barbara helped me begin to think and operate in a different manner and to develop a clearer vision of my future.

Mike Skowronek

Owner, Strata Business Consultants

Working with you exceeded my expectations. I hired you because I was unfulfilled professionally and wanted to do something about it. You provided a fresh perspective and a holistic approach to achieving happiness, both professionally and personally.

Vice President, Lending

[Read more here](#)

*Discover Coaching and Become Greater*  
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