



## **Clear Impact Executive Coaching Programs**

**Purpose:** *The Clear Impact Performance Development System* enhances capability and capacity in executive and other leaders' performance, thus strengthening organizational and individual effectiveness and fulfillment.

### **Plan A: Unlimited executive coaching on a retainer basis**

**This program is particularly suited to organizations desiring accountability for performance and/or development issues**

**Highlights:** Effective executive coaching involves a true partnership between Coach and Client. Over time trust builds and the coaching deepens in value. Several factors allow this option to be particularly powerful:

1. The Coach is on a monthly retainer for unlimited (reasonable) contact, inclusive of all collateral interviews. Without a focus on the "meter running," both Coach and Client are free to put all their attention on collaboratively moving towards Client's goals. The typical period of coaching is nine months to one year.
2. This plan is meant to model optimal performance management. The Sponsor (usually but not always the manager) works together with the Client to set and develop accountability for performance goals that are aligned with organizational goals. They also engage in monthly progress discussions.

**Step One: Selection of Sponsor.** It is important that the chosen Sponsor has appropriate power, authority, and responsibility to impact the Client's success, as well as sufficient knowledge of organizational goals to ensure alignment with coaching goals. ***The Sponsor stays actively involved in the coaching***, including monthly meetings between Coach, Client and Sponsor for progress reporting, feedback, removing roadblocks, and maintaining alignment.

**Step Two: Initial Consultation and Goal Setting.** The initial consultation is a meeting between Coach, Client and Sponsor (and perhaps other stakeholders) to clarify the overall purpose and goals for the coaching program. At this time, roles of all involved parties and reporting requirements will be mutually agreed upon, as well as the breadth and limits of confidentiality.

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**Step Three: Assessment.** The initial coaching sessions will focus on gathering and integrating assessment data in order to develop self-awareness. This phase usually takes 13 weeks.

- It typically begins with the Coach conducting individual in-depth interviews with the Client, Sponsor, Manager and other key stakeholders (including but not limited to peers, direct reports, and internal or external clients).
- A variety of assessment techniques may be drawn on to assist in determining the performance and developmental needs of the Client, including the DISC and PIAV. We have developed particular expertise with the *Enneagram*, and this often becomes a cornerstone of the self-awareness and development process.
- Often towards the end of this phase we include one or more 360° feedback instruments, including the *Leadership Versatility Index* and the *Emotional Competencies Inventory*. At times the organization already has an instrument of choice, or sufficient 360° data is already available.

**Step Four: Implementation.** During the implementation phase, usually six to nine months, various modalities will be used including face-to-face and telephone coaching sessions, email, shadowing and feedback, and action learning. Materials such as books, tapes and tools will be incorporated to increase insight.

- As mentioned, monthly *Sponsor Sessions* are an important part of this process.
- Some clients find significant benefit from one long session per month (often two to three hours) and shorter contact during the rest of the month. Others prefer 30-60 minute regularly scheduled meetings. We are also adept at conducting 10-15 minute, highly focused sessions. These short sessions may offer a better fit with the busy schedules of our clients, leading to less need to cancel and/or reschedule.

**Developmental Action Planning.** Incorporating the results of the assessment, a developmental action plan is formulated by the Client, in collaboration with the Coach and Sponsor. The plan generally includes goals, objectives, action steps, and metrics to measure progress. The Sponsor is responsible for ensuring that these are aligned with organizational goals.

**Selection of a Development Team.** Regular feedback on performance and development goals greatly assists the coaching process. The Client typically selects a small group (3-5) including the Sponsor, other leaders, peers and direct reports who can provide pertinent and honest feedback. The Client generally gathers the monthly feedback either through short five-minute discussions or email questionnaires.

**Evaluation.** Informal evaluation takes place on an ongoing basis between the Coach and Client, and monthly with the Sponsor. In addition, if appropriate formal evaluations will take place at regularly scheduled intervals, generally once a quarter in a meeting with Client, Coach and Sponsor and others if designated.

**Step Five: Closure.** At the conclusion of the coaching period, in a final meeting Client, Coach and Sponsor reviews progress and to discuss ways to ensure continuation of development.

**Plan A with a Contracted Rate.** We have found that most organizations see the value in the unlimited retainer model, both for coaching effectiveness and for ease in budgeting. Other

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organizations may prefer to define the amount of time the Coach will spend at an hourly rate. In such situations these parameters are clearly defined, along with who in the organization has the authority to change this agreement.

## **Plan B: All other executive/leadership coaching**

Many organizations prefer **Plan A** because it is designed to integrate coaching into the whole context. However, for any number of reasons the organization or its leaders may decide that this full program is not appropriate, while still retaining some aspects of **Plan A**. For example, a leader with available budget may choose to be coached, sometimes with the overt awareness of others in the organization and sometimes not. In other situations there may not be a perceived need for an accountability structure beyond that between Coach and Client.

***What sets us apart from many executive coaches is the way in which we integrate our expertise and experience as organizational consultants into our coaching.***

### ***The Coaches:***

As an organizational consultant and executive coach, **Sandra Hill, M.A.** has spent more than 30 years assisting thousands of leaders and their direct reports in enhancing organizational capabilities. For 11 years, as senior lead organizational consultant for a Fortune 50 telecommunications company with over sixty consultants and trainers reporting to her, she was responsible for developing and then providing a full range of organizational development consulting services including leadership development, executive coaching, team building, performance management, communication systems, strategic planning and merging of organizational cultures.

Her extensive experience with many U.S. and international companies has allowed her to develop a proven track record of success in enhancing productivity and performance. A master at organizational assessment, she's a catalyst for her clients developing powerful strategies and organizational cultures that optimize customer satisfaction, employee retention, and bottom line success. This has led to trusting, long-term client relationships.

An executive coach long before it was popular to be a coach, she is widely known for her pioneering work with leadership development and team development, including top executive, virtual and cross-functional teams. She is recognized for the innovation and creativity she brings to her work. Other areas of expertise include mergers and acquisitions, project management, and diversity. She masterfully incorporates assessments into her work, including the Myers Briggs and the Enneagram. Her clients have included Lucent Technologies, AT&T Bell Laboratories, Cisco Systems, IBM, the World Bank, Skidmore Owings & Merrill and StorageTek.

**Dr. Joel M. Rothaizer, MCC** is an executive coach and organizational consultant with extensive training and over 30 years experience in understanding the functioning of both organizations and the people within them. His focus is on leadership development, executive coaching and organizational/team development. He assists leaders in finding styles that are more successful,

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authentic, and energizing. He assists teams and organizations in creating results-oriented cultures vitalized by collaboration and partnership, with increased innovation, employee engagement and retention, customer service and productivity.

A Licensed Psychologist and Certified Business Coach with a strong systems orientation, he is also on the faculty of Corporate Coach University and a certified facilitator of The Coaching Clinic, a program that trains managers and leaders in using coaching technology to increase their effectiveness.

Joel assists his clients in focusing on root causes rather than on energy-sapping symptoms, and in discovering unique and elegant solutions to seemingly complex problems. His clients have included AT&T Bell Laboratories, General Electric, IBM, Skidmore Owings & Merrill, STV, Los Alamos National Labs, DoubleClick and StorageTek. An acknowledged expert in the use of the Enneagram, he has also published numerous articles, conducted systems trainings at a national level, and was featured in a publication on executive coaching.

Trained in both corporate crisis intervention and traumatic stress reduction, he worked with several New York City organizations severely impacted by the events of September 11th. The International Coach Federation has designated him as a Master Certified Coach.

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