

Create a Coaching Strategy

A guide to getting the results you want from an investment in coaching.



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How Can I Create a Coaching Strategy?

Welcome back! After laying the foundation for our work together in [Chapter 1](#)—understanding the impact and importance of coaching—we’re happy you’re here to jump into *how* to create a coaching strategy.

Creating a strategy can feel difficult. In recent [Harvard Business Review Analytics Services research](#), 44% of people leaders reported that the greatest challenge they face is a lack of a clear leadership development strategy.

Why is creating a strategy so challenging? After talking to some of our customers (HR and L&D leaders), we learned about two main obstacles:

- Gaining support and buy-in from leaders at the top of the organization
- Having limited time and bandwidth as an L&D or people team



To gain support from leaders at the top of the organization, it's important to connect coaching programs to your organization's objectives. How to do that is the focus of this chapter.

As for limited bandwidth, we recognize that creating a strategy from scratch can feel difficult since there are so many factors to consider. We're here to help.

After interviewing our customers, we identified four key pillars of an effective coaching strategy. Keep reading, we'll walk you through each pillar, and share examples and best practices.



Four Key Pillars of a Coaching Strategy

We recommend developing your strategy based on four pillars that answer the following questions:

- *What* does coaching help your business achieve? (GOALS)
- *Who* will benefit most from coaching? (PARTICIPANTS)
- *When* is coaching most useful? (TIMING)
- *How* does coaching integrate with and support other parts of your business? (SYSTEMS)

Four Key Pillars of a Coaching Strategy



Note: The pillars are not sequential steps. They are components that work together.

FOUR KEY PILLARS OF A COACHING STRATEGY

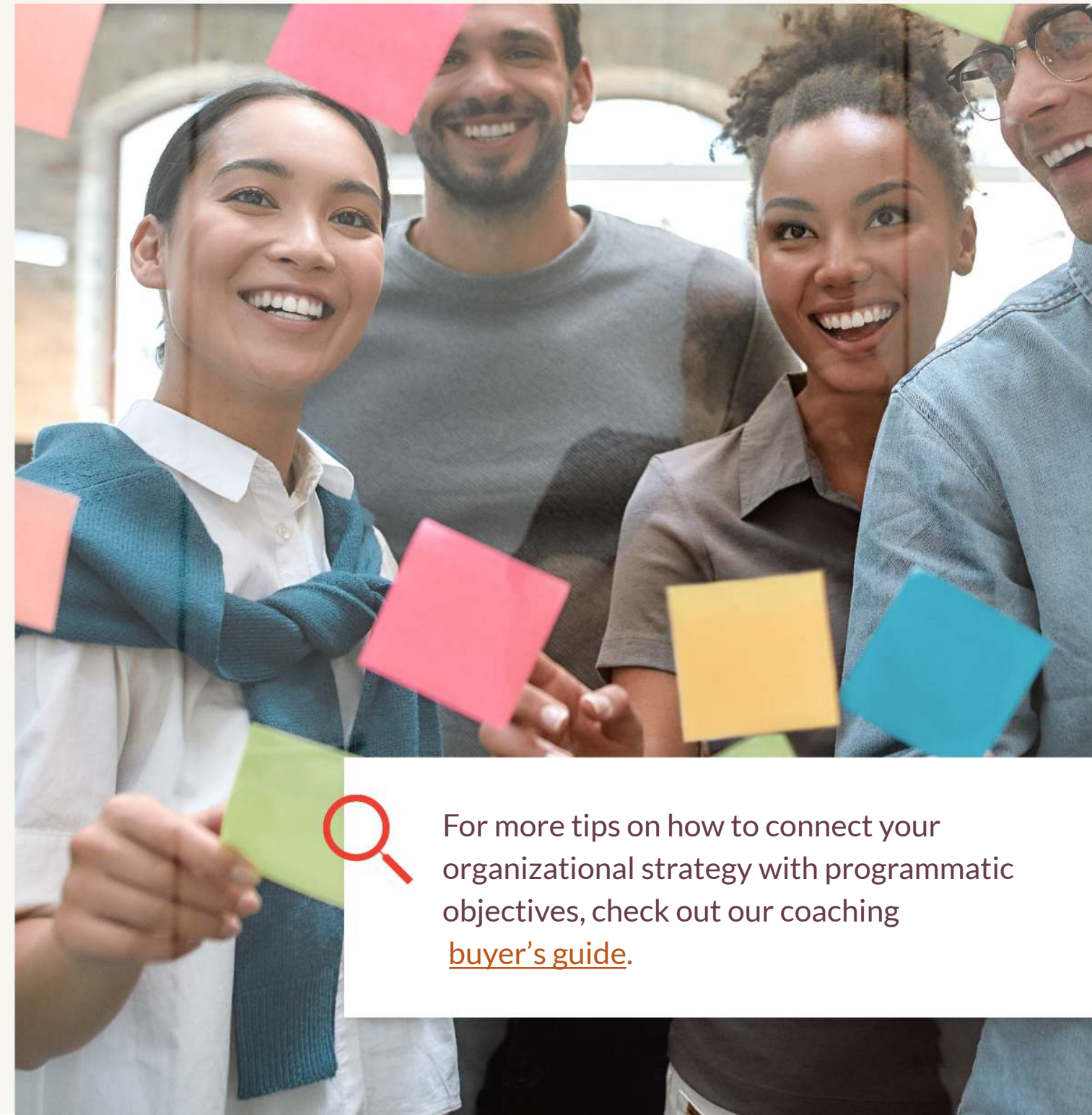
Goals: What does coaching help your business achieve?

Coaching conducted in a vacuum, disconnected from the larger business context, is less likely to [drive success for the business](#). Coaching is a powerful tool, but like any learning program, it can [drive even greater results](#) when there is a clear target. Focus your efforts and evaluate your program success by articulating what success looks like from the start.

The first step in crafting your coaching goals is to consider your organizational priorities for the year. What does your organization want to achieve and how does coaching support those goals? Then draw clear links between these priorities, your L&D strategy, and your coaching program goals.

To do this, we see the most successful organizations asking the following questions:

1. What are our business objectives?
2. How does coaching fit into our L&D strategy?
3. What are our goals for coaching?



For more tips on how to connect your organizational strategy with programmatic objectives, check out our coaching [buyer's guide](#).

Let's take a look at an example.

We asked Sarah Pottieger, Head of People at Forum Brands, about how she and her team connect their priorities to their coaching programs and her responses were revealing. The links between their program goals, learning strategy, and organizational priorities are clear.

What are your goals for coaching?

“Coaching is a part of our larger learning and development goals. **Our goal is simply enablement and making sure that [our leaders and managers] feel empowered to uplevel their own teams.** We have a lot of young people leading for the first time, so [we want to make sure] that they feel enabled and empowered by someone that's not internal.”

What role do your business objectives play in creating the coaching programs?

“We have two company objectives for the entire year, and one of them is continuing to develop people, [specifically focused] on **developing and enabling excellent team members.** Some of the key results [that make up this objective] are a manager effectiveness score, a team inclusion score, and a collaboration and enablement score. Torch [coaching] plays a huge role in making sure those things are met. I know I've become a more effective manager with [coaching] so that directly ties it to a business goal. **Building effective managers is one way that coaching will play a role** in supporting our business objectives over the next year.”

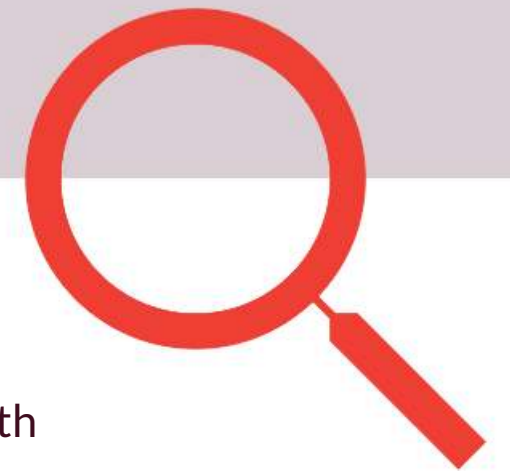
How does coaching fit into your L&D strategy?

“It's a big part. Coaching has improved the relationships people have with their managers. For someone who might want to talk about a promotion or something that's been bothering them with another team member, they feel like they get a first pass with their coach and then can bring it up [with their manager]. It's been good for **strengthening manager and report relationships.**”



SARAH POTTIEGER
Head of People
Forum Brands

Forum has established a direct link between their program goals, L&D strategy, and organizational objectives. They want to invest in managers to improve managerial relationships and boost team performance in the organization. Sarah shared that the team also tracks specific scores to evaluate the impact coaching has on key results like **manager effectiveness, collaboration, and engagement scores**. Those measures are often critical in achieving and sustaining buy-in and they demonstrate a **strong measurement strategy** (which we'll dive into more in Chapter 4.)



RESEARCH INSIGHT

A measurement strategy starts with identifying the outcomes you want to see from coaching so you know what to look for. Identifying goals is also a crucial step to gaining consensus on measurement among stakeholders.

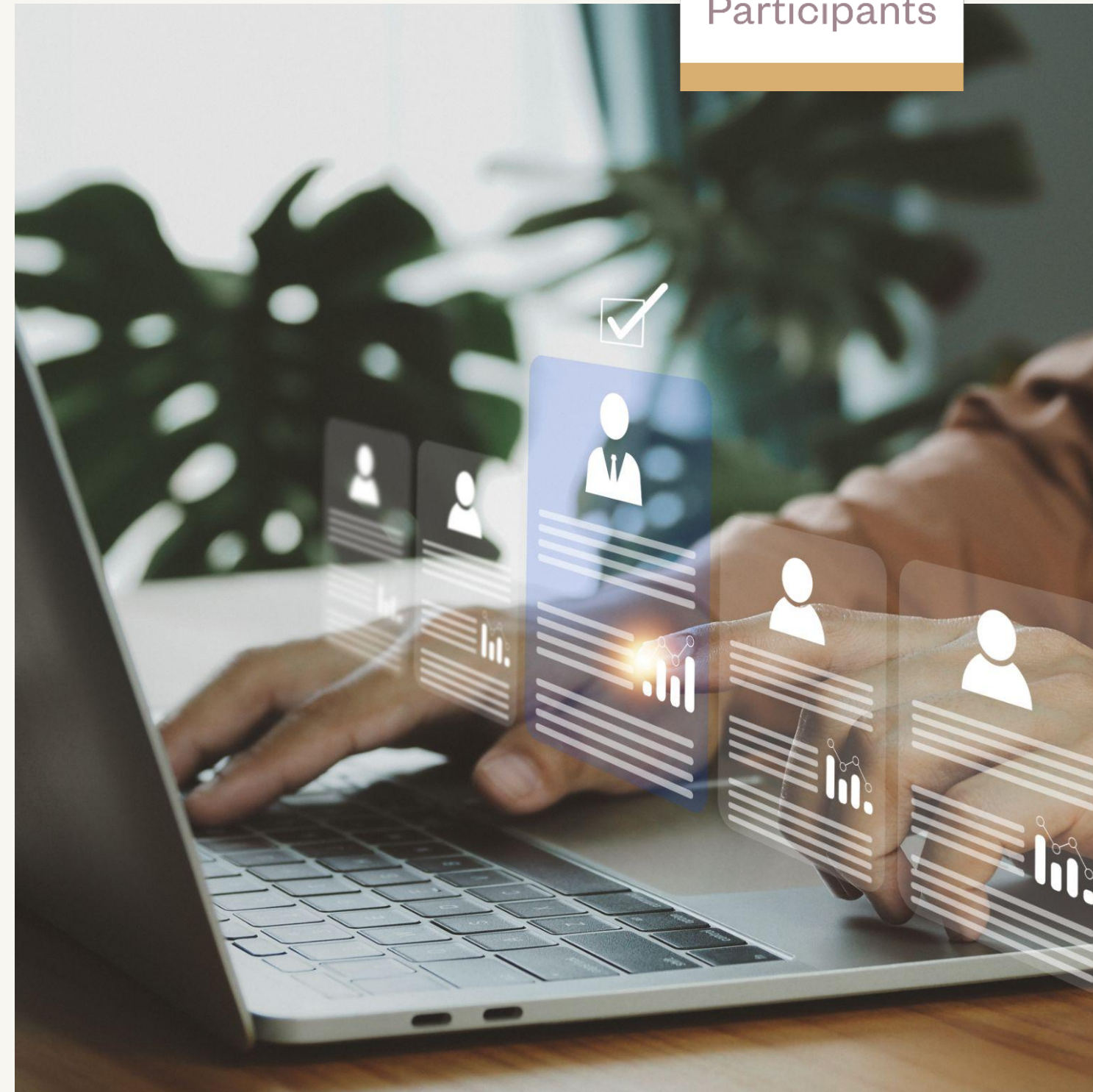


FOUR KEY PILLARS OF COACHING STRATEGY

Participants: Who will benefit most from coaching?

Now that you've laid out your program goals and how they link to business objectives, the next step is to select participants. How you select participants can play a significant role in their level of engagement in coaching, and ultimately, in the success of your program. That means developing a strong selection process is critically important, which includes using a consistent set of questions, criteria, and sources of data to identify participants.

Your program goals may automatically help you define your participants—for example, new managers or new parents. If it's not immediately clear who to include, you'll need to do some work to define the group. **It makes sense to start with how you define leadership, or potential, in your organization.**



FOUR KEY PILLARS OF COACHING STRATEGY: PARTICIPANTS

Here are four recommendations for defining and selecting coaching participants:

1. Start with your defined goals
2. Identify the right population
3. Develop criteria for selection
 - a. What sources of data do you want to leverage (e.g., engagement, performance scores, etc.)?
 - b. Make sure to consider who wants to be coached
4. Communicate selection strategy to the organization

THE MORE YOU KNOW

How a strong selection strategy relates to equity and inclusive leadership development

Establishing a consistent selection strategy makes offering coaching a more **objective, strategic, and equitable process**. When selection is informal or ad hoc, it often hinges on manager nominations which can be rife with bias; managers may choose participants they like over those who might benefit most from the opportunity. If you're interested in a deeper dive into building an equitable selection process, please check out [our research](#).



FOUR KEY PILLARS OF A COACHING STRATEGY: PARTICIPANTS

Start with defined goals

What does this look like in practice? Blueprint Test Prep started their selection process by considering three key organizational goals: Developing and improving executive leadership, investing in future leaders, and offering additional support and development.

Identify the right population

Based on these goals, Blueprint Test Prep identified the right populations to receive coaching - executives, high-potential employees, and select individuals identified through quarterly engagement survey results.

Develop criteria for selection

Next, Blueprint Test Prep needed to further determine who in those populations would be right for their programs. This meant setting selection criteria. Though they decided to offer the opportunity to all executives, they had more specific criteria for the other populations. To identify future leaders, they leveraged performance management/talent assessment data, and to identify employees who needed additional support and development, they leveraged engagement data.



Another criteria our customers consider when choosing coaching participants is simply, “who wants to be coached?” (step 3b).

Research suggests that those who are more open and show higher “readiness” for coaching are more likely to take advantage of coaching. They are also likely to demonstrate more positive outcomes from coaching, including improved job performance, professional and leadership growth, and greater achievement of goals.

Our customers prioritize coaching readiness, too, stressing the importance of the participant’s appetite for change:

“Out of all of our success criteria, **openness and willingness to learn** is the most important. No matter how hard we sell the coaching experience, if there’s not a genuine interest to learn and/or challenge their own thought processes and behavior, it’s going to be a failed experience.”

- IAN SANDER, Senior Manager of People Programs at Brex

Blueprint Test Prep Coaching

Blueprint Test Prep offers coaching to meet three different goals, serving three distinct employee populations. In the chart below, you can see that the program goals indicate and influence participant selection.

Goals	Talent Pool of Interest	Selection Criteria
Develop and coach executive leadership	Executives	All members of that population
Invest in future leaders	HiPos	High scores on bi-annual talent assessments
Offer additional support and development	Managers	Identified by scoring on engagement surveys

Torch can help you identify individuals that are open and eager to learn by crafting the right questions to ask in the selection process.



Communicate selection strategy to the organization

Finally, once you've created an intentional and equitable selection strategy, it's time to communicate it to the broader organization. Sharing why participants were chosen is essential to ensuring engagement and the highest utilization of coaching. Involving managers and leaders in communicating the selection strategy sends a message that the participant's leader 1) is investing in them specifically and uniquely, and 2) that coaching is an important way to spend their time.

Communicating your selection process to the broader organization makes it more equitable. [Transparency around these decisions](#) gives all employees an understanding of how and why leaders are offering these opportunities.

Choosing the right people for your programs and communicating why they've been chosen are important first steps to ensuring the highest engagement in coaching. In Chapter 3, we'll share even more tips to sustain engagement once your coaching programs begin.

Timing: When is coaching most useful?

There are two major considerations when it comes to timing:

1. when is the right time for the business
2. when is the right time for the individual

We call these “moments that matter”—moments of transition and change when coaching is most beneficial.

Timing for organizations

Moments of organizational change are ripe for coaching support. Here are some examples from our customers:

- **Upskill rapid growth.** Whether hiring externally or promoting internally, upskilling large groups in the organization is often a catalyst for coaching.

- **Support DEIB efforts.** With more organizations committing to diversity, equity, inclusion, and belonging (DEIB) efforts, group coaching helps organizations address topics like inclusive leadership.
- **Guide significant structural changes.** Significant changes to organizational structure, whether through re-orgs or mergers and acquisitions, can be difficult for existing and acquired employees. Offering coaching to employees navigating these changes can lead to positive outcomes, including meeting more of their goals, greater change readiness, and improved leadership resilience.

Timing for individuals

Sometimes, a group of employees may be navigating similar professional and personal changes, where coaching could provide them critical support. Examples of this include programs for new managers and programs to support employees before and after going on parental (or family) leave.

Case Study

Going on parental leave is a significant change for many employees, and research shows that [integrating back into work can be difficult](#). For this reason, a large tech firm offered coaching to new parents transitioning to parental leave and back to their return to work.

Before going through coaching, participants reported feeling concerned about how this transition would impact their careers. After the program, close to half (**46%**) reported feeling less anxious about the transition, with one participant sharing:

“This was a great experience that helped me reduce my anxiety about working and parenting together.”

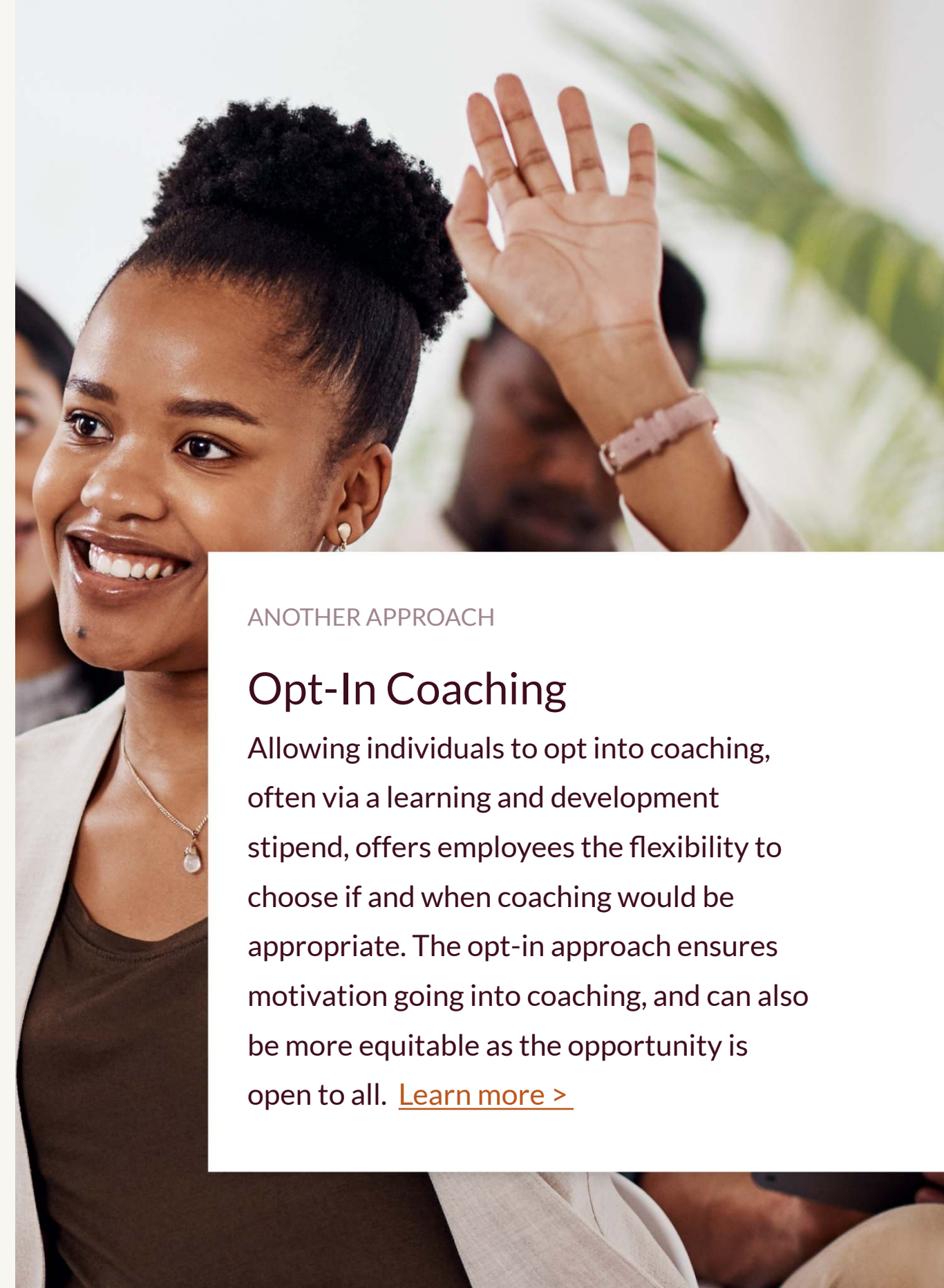
Participants also shared that they felt more confident in navigating this transition (**60%**), and that they felt more supported by their organization in making it (**56%**).



FOUR KEY PILLARS OF A COACHING STRATEGY

Other times, these “moments that matter” are very specific to the individual. Some examples:

- **Becoming a new manager.** One participant shared his experience with coaching as a first time manager, working through the transition of moving from executing on technical work to managing people.
- **Advancing into senior leadership.** Other coaching participants start coaching right as they're [advancing into new leadership roles](#). One participant leveraged coaching as a way to learn how to become a more effective leader of her new team, having been recently promoted to a director role.
- **Developing new leadership skills.** Some employees have had years of leadership experience but want to refine their leadership approach. One leader discussed how a transactional style of leadership was no longer working in his new industry, nor was it working with younger coworkers. He used coaching to discover new ways to lead, helping to strengthen relationships and build a more engaged team.



ANOTHER APPROACH

Opt-In Coaching

Allowing individuals to opt into coaching, often via a learning and development stipend, offers employees the flexibility to choose if and when coaching would be appropriate. The opt-in approach ensures motivation going into coaching, and can also be more equitable as the opportunity is open to all. [Learn more >](#)



FOUR KEY PILLARS OF A COACHING STRATEGY

Systems: How does coaching integrate with and support other parts of my business?

Integrating coaching with your HR and L&D systems and processes helps you maximize the efficacy of your programs and people development strategy.

Coaching can help:

1. Support skill-development
2. Select participants and measure program effectiveness
3. Attract key talent
4. Assess and bolster employee engagement



FOUR KEY PILLARS OF A COACHING STRATEGY: SYSTEMS

Learning ecosystem: Support skill-development

Coaching is a key player in the [larger learning ecosystem](#). It supports specific skill development and identifies additional learning and growth opportunities.

First, coaching can effectively and sustainably address the learning needs or skill gaps of each individual participant. Through one-on-one coaching or group coaching, participants can address **personal or organizational skills like leading inclusively or effectively giving feedback**.

Additionally, coaching can surface broader learning needs of the participants at a program level (aggregated and anonymized). People leaders can then leverage other learning mechanisms to address these broader learning needs.



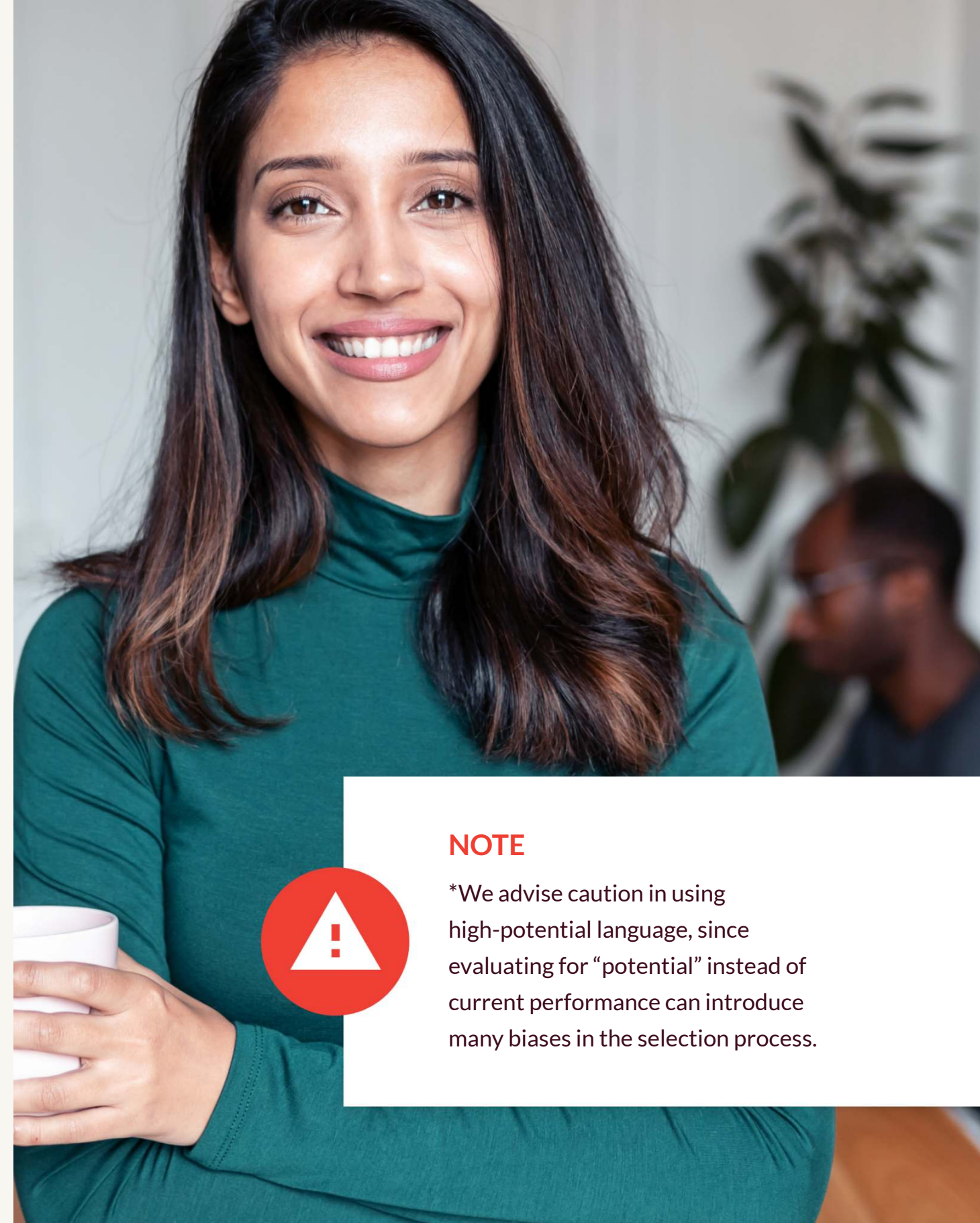
FOUR KEY PILLARS OF A COACHING STRATEGY

Performance management: Select participants and measure program effectiveness

For organizations with formal performance management systems, these processes support coaching programs with data that helps organizations identify participants and then later, measure coaching program effectiveness.

Many organizations turn to performance management data to identify high-impact* employees to invest in with coaching. In addition to performance ratings, managers can leverage ongoing development conversations to discuss if (and when) coaching is appropriate for their direct reports. This approach tailors coaching to an individual's "moments that matter," which typically results in higher engagement. Discussions between managers and employees can also help clarify participants' goals for coaching and connect them with organizational goals.

Organizations also turn to their performance management systems to look at the impact of coaching on a group of participants. We'll cover more on this in Chapter 4.



NOTE

*We advise caution in using high-potential language, since evaluating for "potential" instead of current performance can introduce many biases in the selection process.

Recruitment: Attract key talent

Coaching can play an important role in attracting key talent. Unlike other learning opportunities, coaching signals an investment in employees' careers from the start. In fact, between the years of April 2021 - April 2022, career development was one of the main reasons for why employees left companies.

"[Coaching] is a professional program, so it's more of a big deal. When people get invited to be a part of it, [they] know that Blueprint is paying for the service for you. I think it's more of an honor, as corny as that may sound. It's a neat offering that I haven't seen at any other companies I've worked for, and as long as we continue to see the success and value of it, which so far has been almost a 100% across the board for users, then it'll continue to be part of our development strategy"

- TIFFANY PRICE,
Director of Human Resources at Blueprint Test Prep

Employee feedback: Assess and bolster employee engagement

Coaching directly supports employee engagement. Like other focused programs, we see some customers offer coaching to support a less engaged population. Employee feedback scores also can help program managers and leaders evaluate the impact of their coaching program by looking at changes in engagement. *More to come in Chapter 4.*

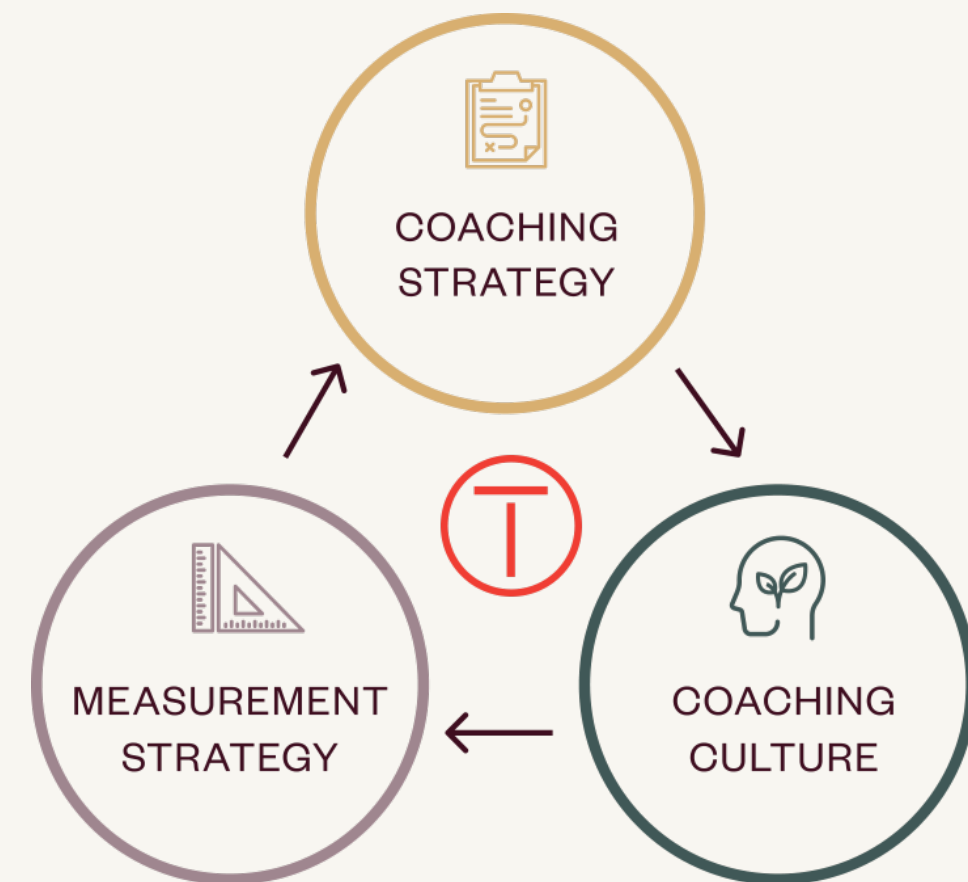


Up Next - Chapter 3

Now you're ready to write down your coaching strategy, complete with:

- ☑ **Defined program goals** that incorporate your organization's objectives and wider people development and learning strategy
- ☑ **A selection strategy** to identify participants consistently and equitably, while intentionally offering coaching to those who are more likely to take advantage of this offering
- ☑ **Intentional program timing** to make your programs the most impactful, taking into account both organizational and individual level changes
- ☑ **Integration and alignment** between your programs and your HR and learning systems and processes to ensure coaching has a compounded effect across your organization

After you create a coaching strategy, one of the biggest questions we get from our customers is often “how do I make sure that the benefits of coaching extend beyond the people in my programs? How do I create a coaching culture?” That’s the subject of our next chapter (Chapter 3).



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Torch

Torch is the People Development Platform that unlocks the potential of people, teams, and organizations.

By combining coaching and mentoring, Torch helps you design, manage, and measure programs that drive the success of your people—and your organization.

[Request a demo](#)

