



How to Select a Coaching Solution

A practical guide to evaluating and buying a coaching solution for your organization

Torch

Choose your solution partner

You've decided now is the time to invest in coaching. The next step is to select the right solution. Here is a guide to the selection process with the goal of helping you choose a solution that meets your program requirements, is easy to buy, own, and use, *and* can scale and adapt with your organization.

"We ultimately chose Torch because of its flexibility to adapt, support for our employees, and the high degree of partnership that is noticeable at every turn."

-TRAMEL DODD, Director, Learning & Development, Reddit

The good news is that you've already read about and maybe even done step one—the hard work of defining your goals. Now, let's understand the final steps, which include mapping your unique timeline, developing your requirements, doing research, navigating budget, legal, and procurement processes, evaluating solutions, getting stakeholder agreement to move forward, and finally preparing for program implementation.

What does a typical buying process look like?

Here's an example of a timeline of steps from evaluation to purchase and implementation. Of course, each organization is different, but it may be helpful to use this to create a plan and set expectations in your organization. Timelines can vary, so use what you know about your organization.

Step	To-Do's	Timeline
1 Know your goals + define your program	<ul style="list-style-type: none"> • What is the goal/s of your program? What business objective does it serve? • How does it support your people strategy? • What is your vision for launch? • Who will participate in this program? • Map who needs to buy-in to this decision/investment? 	Week 0
2 Map your timeline	<ul style="list-style-type: none"> • What steps will you need to take—from evaluation to purchase to implementation? 	Week 0-1
3 Research	<ul style="list-style-type: none"> • Develop your requirements. • ID solutions that you think meet your criteria. • Read the solution website, consume their content. • Understand your available budget • Define your internal buying team 	Week 1-2
4 Evaluate solutions	<ul style="list-style-type: none"> • Get in touch with a sales representative at the company. • Schedule a demo tailored to your use case. • Look at customer stories and recommendations 	Week 3-6

Step	To-Do's	Timeline
5	Budget Approval <ul style="list-style-type: none"> Understand how this investment will be funded Does the budget currently exist? Do you need approval? What is the process for approval 	Start Week 3
6	Legal/ Procurement Review <ul style="list-style-type: none"> What are the requirements for vendors at your organization? Do they need to clear any privacy or security requirements? Do they need a Master Service Agreement in place? These can take a while depending on the processes at your organization. The more you understand in advance and give notice to your vendor, the smoother/faster it will go. 	Start Week 3
7	Program Planning + Kickoff Considerations <ul style="list-style-type: none"> Who needs to be involved in kickoff? (IT/HRBPs?) What is your timing of the kickoff-around any major business cycles that may distract? 	Week 6-7
8	Make a decision/ Agreement <ul style="list-style-type: none"> Choose a solution based on their ability to help you achieve your near and long-term goals. It's important to choose a partner that you feel confident about, which may not be the one with the lowest price. 	Week 7-9
9	Kickoff <ul style="list-style-type: none"> You should have an idea of this process from your evaluation of solutions, but just in case, you'll need to select your program participants, and work with your solution provider to get them in the platform, matched, and started. Be sure to set up your program with enough data structure that you're able to measure the impact at the end of the engagement. 	Week 10-12

Develop your requirements

As you do your research and start your solution evaluations it will be helpful to have a common set of requirements defined. It's good to think about what is critical to your organization, and what is nice-to-have. Using a consistent rubric will help you understand which solutions can match your organization's needs. It's important to look across solutions and weigh the cost for each platform against your requirements. You'll want to ensure that you are getting the features, quality product, support, and scalability you're looking for. Here are a few suggestions for parameters that you'll want to use consistently as you evaluate all solutions:

Coaches

This is ultimately the most important piece of a coaching program. High-quality coaches will move the needle for your coachees and business. Are the coaches:

- Highly trained, with relevant certification, degrees, and experience?
- Bringing diverse perspectives and backgrounds?
- Able to coach participants at different experience/leadership levels?
- Leveraging a single methodology or drawing from multiple?
- Offered continued education?

“The program helped me find myself again, and have fun. It helped me transition to be a better leader/senior in my team and act like one.”

-TORCH COACHEE

Technology

There are a few different things to consider as you think about the technology of a people development platform. Does it:

- Reduce burdensome administrative tasks? Software should automate processes, track employee progress, and measure value. This empowers the administrator to focus more on strategy, impact, and scaling successful programs.
- Integrate with key pieces of technology, collaboration software, emails and calendaring systems?
- Integrate with other learning systems like your learning management system (LMS), massive open online courses (MOOCs), and other content providers?

Measurability

To continue to get funding, program owners need to identify a way to measure their success and demonstrate its impact on the business. To that end, does the solution offer:

- A perspective on measuring the ROI of coaching and reporting program success?
- How to report success at different levels—individual versus programmatic?
- The ability for you to access performance data or insights on the platform?

Customization

Every organization is different. That's why it's important that technology and support teams are able to work with you to create programs that align with your business needs and goals. Does the solution:

- Allow you to customize parts of their leadership assessments?
- Tailor elements to your operating principles, culture, and values?
- Reflect your branding and logo in the platform experience?

Support and advice

Technology by itself can provide efficiencies and scale, but a solution is more than that—it's the company and people behind it that help drive your success.

Does the solution offer:

- Access to behavioral scientists who have built the platform on a strong foundation of proven leadership research and best practices and offer guidance and best practices on measurement and reporting?
- Best practices and advice on how to structure, shape, and optimize your program?
- Professional services to help alleviate some of the programmatic lift for your team?
- High-touch and engaged team members on the sales and customer success team?



Did I learn everything I needed to during my coaching solution demo?

Every coaching or people development platform demo will be a little different. Regardless of the path the salesperson takes, make sure you select a partner that makes you feel confident about these 10 critical areas of coaching.

QUESTION	YES	NO
I have the functionality I need to get started now, but still have room for growth	<input type="checkbox"/>	<input type="checkbox"/>
I feel confident in the qualifications and experience of the coaches	<input type="checkbox"/>	<input type="checkbox"/>
I'm able to customize the platform to meet the needs of our brand, values, and goals.	<input type="checkbox"/>	<input type="checkbox"/>
The platform offers key integrations to systems and content	<input type="checkbox"/>	<input type="checkbox"/>
Set up and implementation are not burdensome. I can access best practices, expert advice, and support.	<input type="checkbox"/>	<input type="checkbox"/>
My participants will be able to: <ul style="list-style-type: none"> ● Get started quickly ● Access resources to guide the coaching engagement ● Anchor to goals 	<input type="checkbox"/>	<input type="checkbox"/>
The pricing and packaging meets the needs of my organization today and in the future: flexible, no minimums, pilot options.	<input type="checkbox"/>	<input type="checkbox"/>
I am able to measure the success of my programs.	<input type="checkbox"/>	<input type="checkbox"/>
The platform meets the security requirements that my organization has.	<input type="checkbox"/>	<input type="checkbox"/>
The platform methodologies are sound and based in behavioral science principles.	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

Make a decision

Ideally, once you have moved through solution evaluations, you have a fairly clear understanding of your organization's needs and the tradeoffs you'd have to make if you choose different solution providers. Use the decision-making framework we reviewed earlier in this guide to help move you forward instead of getting stuck.

CONCLUSION

Coaching will transform your organization

Many pieces go into a thoughtful strategy to support the development of people at your organization. It's real work to find and buy a coaching solution that supports your vision for people development. Organizations are better for people like you, who invest their energy into building up their people and teams. We know you can effectively start, build, and transform coaching programs at your organization. **We're here to help.**

Looking for a thought partner?

We'd love to talk through it with you.

