Global Executive Coaching Survey 2018

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RESEARCH REPORT 1691

by Amy Lui Abel, PhD, and Rebecca L. Ray, PhD

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Executive Summary

Businesses today brace for the continuing chaos of digital disruption, regulatory changes, demographic and consumer demands, labor shortages and skill gaps, and more. Businesses need their leaders to evolve and learn how to manage within this chaos. They also need leaders to learn quickly, and coaching can provide the targeted, personalized, and focused development that is required.

This need for a "different" leader of the future is not new. With direction from the Coaching and Leadership Development Council, this report highlights executive coaching practices of organizations. The Global Executive Coaching Survey 2018 is the seventh edition of a biennial survey conducted by The Conference Board. The study focuses on how executive coaching is managed within organizations and examines the external and internal coaching practices of profit, nonprofit, and government organizations.

Building on previous coaching studies by The Conference Board, this current study focuses on how trends are shifting and slowly evolving. Over the years, we have seen coaching embraced by more and more organizations, and its value appears to be growing across industries and for different leader levels. The benefits of coaching match companies' desperate need for developing leaders into leaders of the future.

This year's results reveal the following trends.

Companies need leaders with emotional intelligence to guide teams through ambiguity

The main areas of focus for many coaching engagements involve supporting leaders in guiding teams and influencing others with well-developed emotional intelligence. The level of turbulence in the working environment demands that leaders understand their teams—their stress level, engagement intensity, and motivation. More importantly, when there are issues, leaders need to learn how to resolve these challenges from an engagement and productivity perspective. While automation is infiltrating the workplace, teams are still composed of people, and recognition of the "human touch" is needed more than ever.

Higher costs for coaching engagements, especially at the top of the house

A significant change in coaching rates highlighted in this study is the increase of hourly rates paid for the coaches to the highest levels of leadership (CEO and direct reports). Perhaps the demand for evolving leadership skills has become more critical in today's chaotic business environments. Companies need their top leaders to perform differently and at faster speeds.

Little innovation in the area of evaluation and assessment on the impact of coaching

When asked which evaluation methods they are using for external coaching, two-thirds of surveyed companies are leveraging informal and formal briefings. Monitoring of external coaching with submitted deliverables, along with assessments of manager and coachee satisfaction, are also widely used. These methods remain dominant in recent years and have not seen much evolution or innovation. Employee engagement scores and promotion rates remain stubbornly low on the list of evaluation methods.

Growing focus on developing leaders lower in the organization

Organizations want to expand the benefits of coaching to more leaders, though to scale that expansion with external coaches would likely be cost prohibitive. While continuing to work with external coaches, many organizations are also deploying internal coaches to reach more leaders further levels down into the organization.

For many organizations, the growing use of internal coaches also supports the building of a coaching culture. Within this culture, the behaviors and practices of coaching are encouraged, enhanced, and integrated into other processes. Organizations have been intentionally integrating coaching elements into various talent management processes (i.e., leadership development, promotions, performance review, succession planning, etc.). They have goals of helping every leader become a better coach, so that all employees have access to the benefits of coaching, not just the few.

Demands on leaders continue to change as businesses shift. Organizations need to seek out more approaches and methods that can help their leaders brace for the change, adapt to the change, and thrive with the change. The practice of coaching can help. Organizations continue to explore the possibilities and experiment with ways of coaching and developing leaders.

The management of coaching initiatives also continues to evolve with the need to make coaching an efficient process, cost effective, technology supported, measurable, and scalable to more leaders across the enterprise.

Key Themes and Trends Emerging in 2018

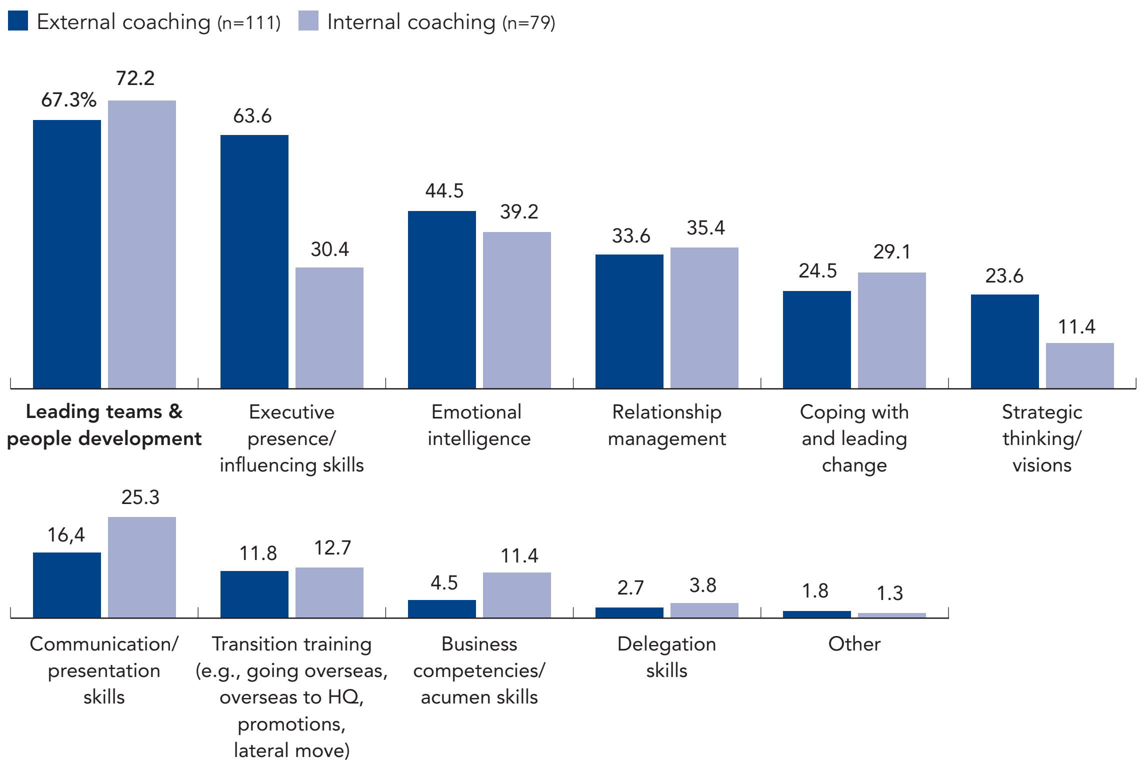
Companies need leaders with emotional intelligence to guide teams through ambiguity

The main areas of focus for many coaching engagements involve supporting leaders in guiding teams and influencing others with well-developed emotional intelligence (Chart 1).

Chart 1

Companies need leaders with emotional intelligence to guide teams through ambiguity

What are the top three most frequent topics covered across all external and internal coaching assignments?



Source: The Conference Board, 2019.

The level of turbulence in the working environment demands that leaders understand their teams—their stress level, engagement intensity, and motivation. More importantly, when there are issues, leaders need to learn how to resolve these challenges from an engagement and productivity perspective. While automation is infiltrating the workplace, teams are still composed of people, and recognition of the "human touch" is needed more than ever. Executive presence stands out as the second most-frequent topic covered by external coaches. In comparison, executive presence is ranked fourth among internal coaching engagements. Since external coaches are mainly reserved for the top of the house, this shows a want to enhance leaders in human touch skills.

Definitions of types of coaching

Development-focused coaching

Best used for:

- Broadening individual capabilities beyond current role for potential future roles
- Building on strengths and preparing for new experiences of leaders, and often part of succession planning processes

360-degree & assessment tools

Best used for:

- Providing feedback for individuals to better understand their own behaviors and the perceptions of those around them
- After assessment, creating action plans with 1–3 coaching sessions focused on implementation

Performance-focused coaching

Best used for:

- Changing individuals behaviors or building new skills to improve performance in current role
- Aligning leaders to their teams, peers and key stakeholders to improve performance in role

Transition coaching

Best used for:

- Accelerating individual's transition into a new internal role (i.e., changing geography, lines of business, function)
- Develop an action plan for transitioning employees that outlines the first few months of new role

Career coaching

Best used for:

- Helping employees plan effective career steps and milestones, often for the retention of employees
- Transitioning leaders to a new career laterally or horizontally that provides personal or professional growth

Onboarding coaching

Best used for:

- Accelerating individual's onboarding from the outside into a new organization (i.e., from different industry, firm size, nonprofit to profit, etc.
- Develop an action plan for identifying key stakeholders, organizational culture, and power networks for early success

Team coaching

Best used for:

- Coaching focused on improving productivity, communication, and level of functioning of an intact team, and not just a few individuals
- Accelerating the team-building and communication processes of newly-formed or intact groups

Group coaching

Best used for:

- Coaching focused on improving capabilities or skills of a peer group, and not an intact team
- Developing cohorts and network of peers across functions that can result in knowledge sharing and problem solving

Diversity and inclusion coaching

Best used for:

- Advancing and supporting individuals from under-represented and other at-risk groups
- Helping individuals explore and overcome personal biases to effectively manage and lead others toward organizational goals

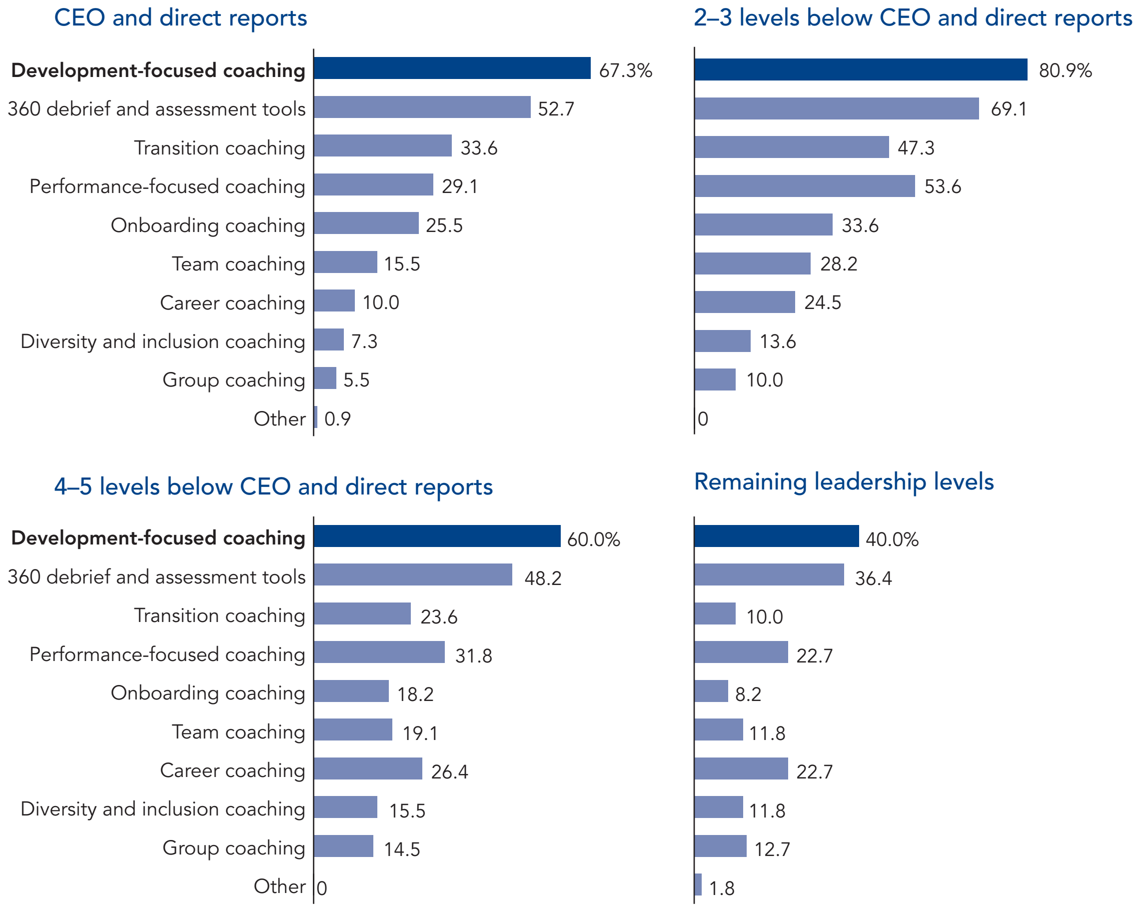
Source: Adapted from: Amy Lui Abel, *The 2014 Executive Coaching Survey*, The Conference Board, December 2014.

Coaching engagements are also development- and future-focused, especially for rising leaders, as companies understand they need to help their high-potential leaders be prepared for future roles (Chart 2).

Chart 2

Preparing leaders for future demands is critical

At what executive levels are the following types of external coaching targeted? Select all that apply. (n=110)



Source: The Conference Board, 2019.

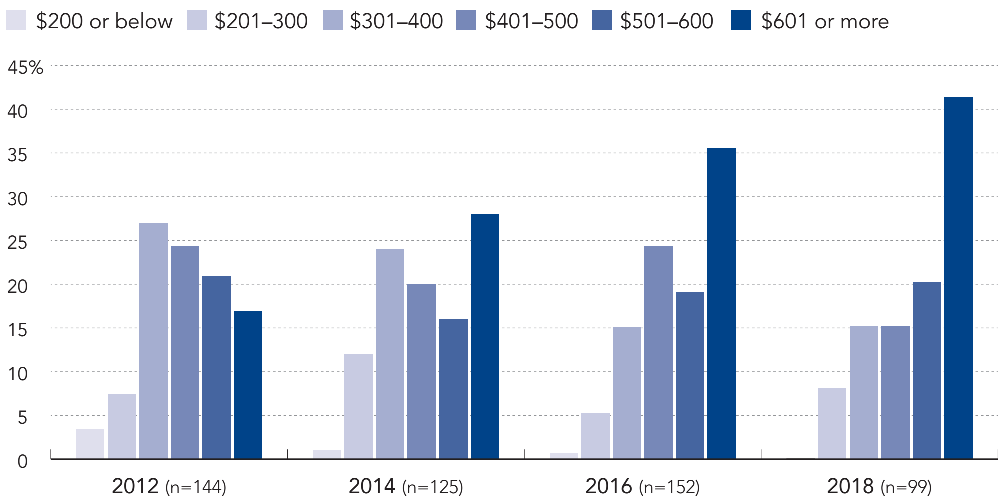
Higher costs for coaching engagements, especially at the top of the house

A significant change in coaching rates highlighted in this study is the increase of hourly rate paid to coaches of the highest levels of leadership (CEO and direct reports) (Chart 3). Perhaps the demand for evolving leadership skills has become more critical in today's turbulent business environments. Companies need their top leaders to perform differently and at faster speeds.

Chart 3

External coaching rates increased, especially at the top of the house

What are the average rates per hour for the CEO and their direct reports?



Source: The Conference Board, 2019.

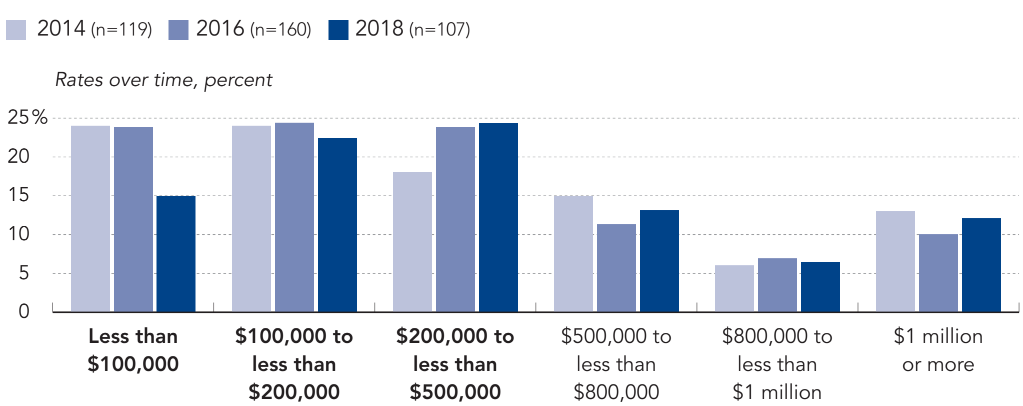
The total spending for overall coaching initiatives has shifted upward slightly over the last few years. Broadly speaking, while overall spending has not changed significantly, more companies were spending between $200,000 and $500,000 in 2018 compared to 2014 (Chart 4).

More than half of the surveyed organizations (62 percent) spend less than $500,000 annually on coaching. However, in 2018 (as in similar past years), we found that some companies (more than 10 percent) continue to spend $1 million or more per year on coaching.

Chart 4

More than half of organizations annually spend less than $500,000 on external coaching

Estimate the total annual dollar amount (USD) spent for all external coaching initiatives.



Source: The Conference Board, 2019.

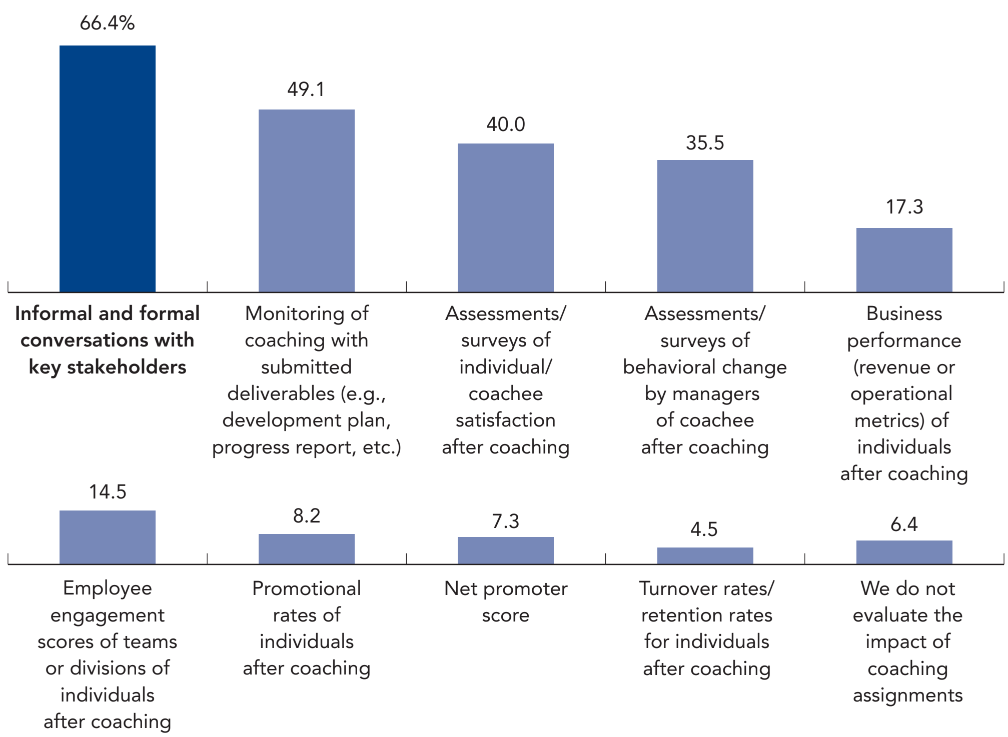
Little innovation in evaluation and assessment of the impact of coaching

When asked which evaluation methods they are using for external coaching, two-thirds of surveyed companies are leveraging informal and formal briefings. Monitoring of external coaching with submitted deliverables, along with assessments of manager and coachee satisfaction, are also widely used (Chart 5). These methods remain dominant in recent years and have not seen much evolution or innovation. Employee engagement scores and promotion rates remain stubbornly low of the list of evaluation methods.

Chart 5

Informal and formal conversations continue to dominate evaluation methods

For your company, what are the top three evaluation methods that provide the greatest value in supporting the impact of external coaching? (n=110)



Source: The Conference Board, 2019.

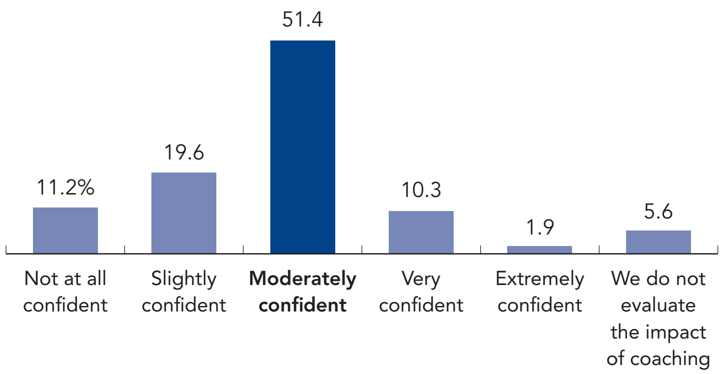
Slightly more than half (51 percent) of companies are moderately confident in their external coaching evaluation methods (Chart 6). Only 12 percent of companies surveyed are extremely or very confident in the methods they are using to evaluate coaching. We believe that these confidence levels are reflective of the fact that most companies are not using analytical evaluation methods. Confidence in evaluation methods remains a challenge for the practice.

Companies are most confident about the following two coaching evaluation methods: informal and formal conversations with key stakeholders (66 percent) and assessments/ surveys of individual/coachee satisfaction after coaching (49 percent).

Chart 6

The lack of analytical approaches continue to lead to lower confidence in coaching evaluation

How confident are you that the results of your company's evaluation method represent the impact of external coaching on your leaders? (n=107)



Source: The Conference Board, 2019.

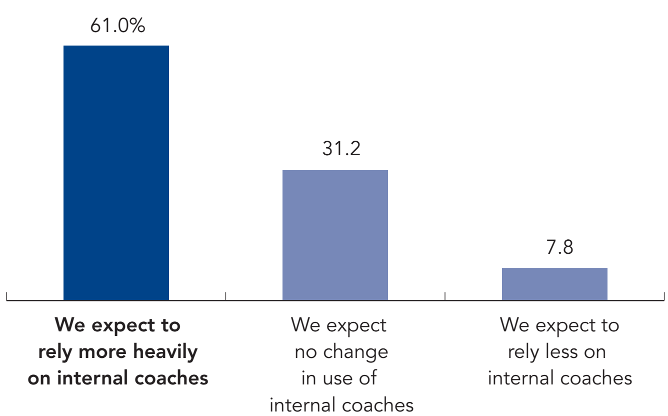
Growing focus on developing leaders lower in the organization

Organizations want to expand the benefits of coaching to more leaders, though to do it with external coaches would likely be cost-prohibitive. While continuing to work with external coaches, many organizations are also deploying internal coaches to reach more leaders, especially those growing their leadership capabilities (Chart 7).

Chart 7

Continued growth on the use of internal coaches to support more leaders

How do you expect the use of internal coaches to change over the next 1 to 3 years? (n=77)



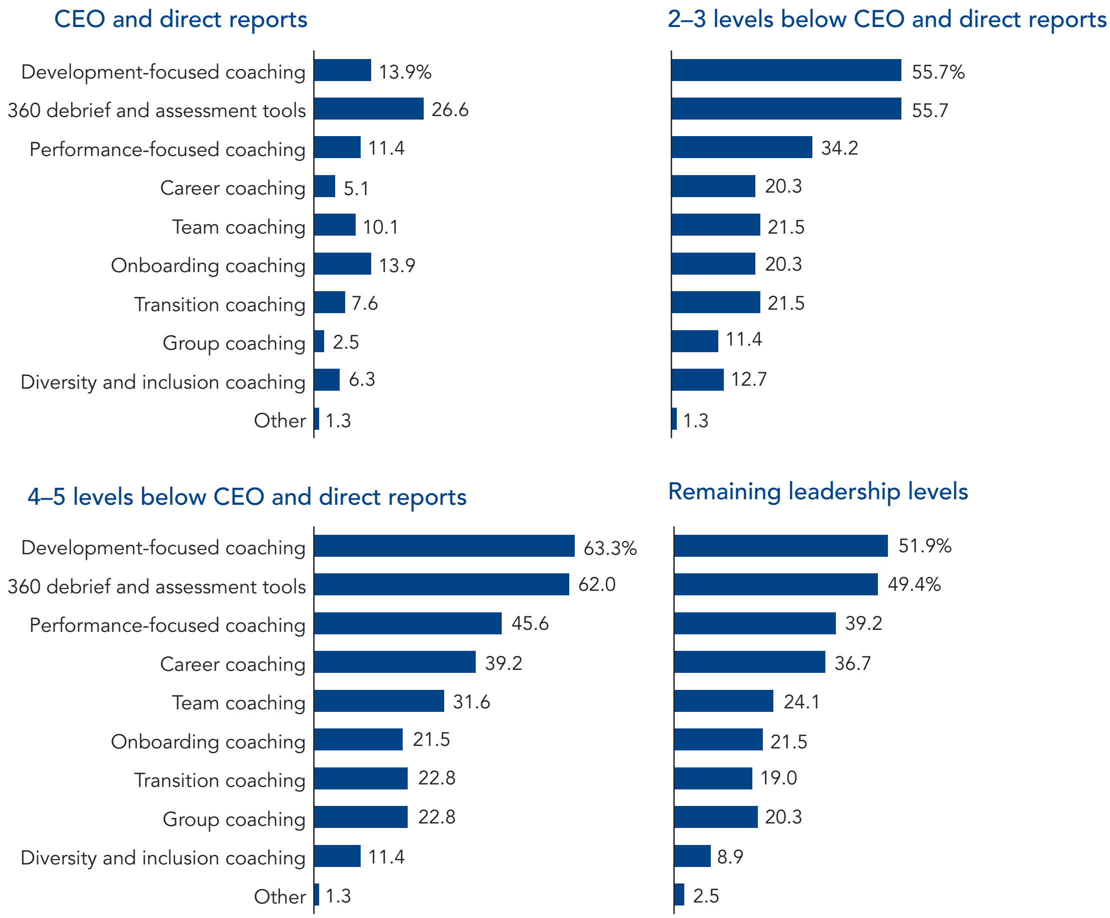
Source: The Conference Board, 2019.

Internal coaching is focused more toward lower levels of leaders than external coaching. Similar to external coaching, the top two types of internal coaching are 360 debrief and assessment tools and development-focused coaching. Likewise, the least coached types are diversity and inclusion and group coaching (Chart 8).

Chart 8

Compared to external coaching, internal coaching is more focused on lower levels of leaders

At what executive levels are the following types of internal coaching targeted? (n=79)



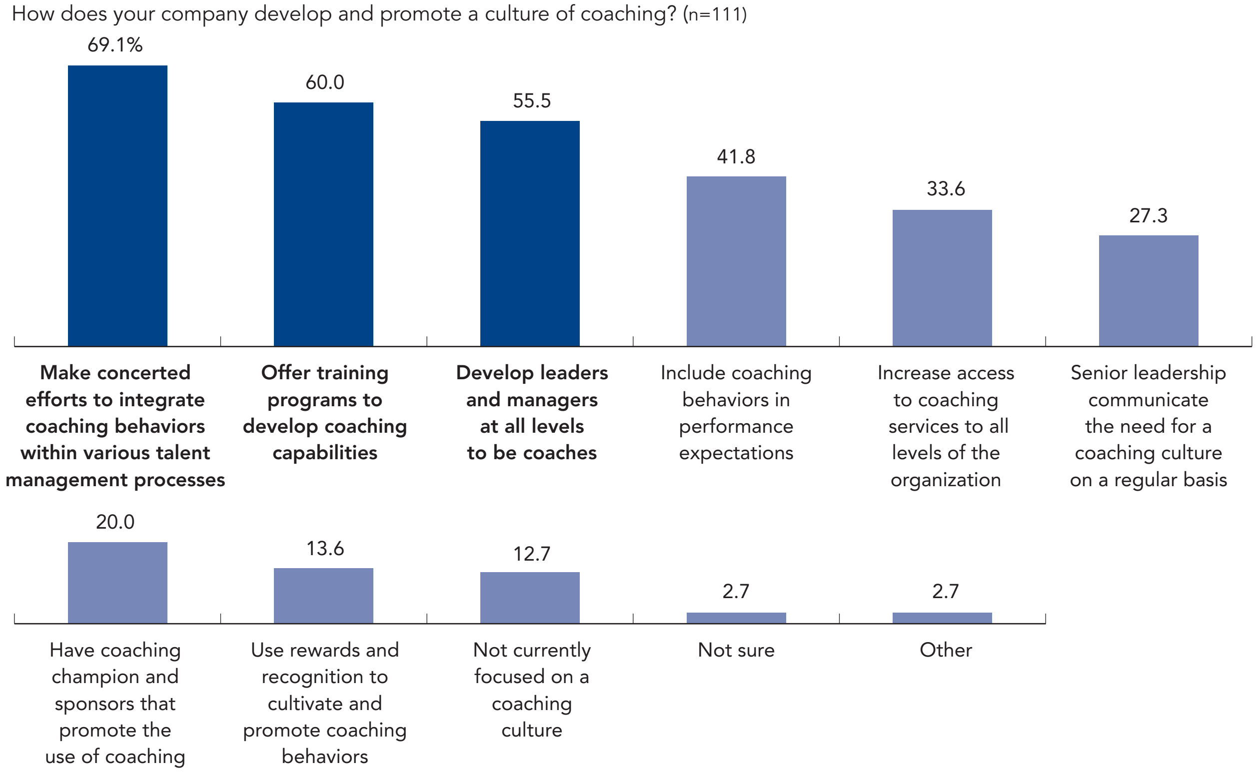
Source: The Conference Board, 2019.

For many organizations, the growing use of internal coaches also supports the building of a coaching culture. Within this culture, the behaviors and practices of coaching are encouraged, enhanced, and integrated into other processes. Organizations have been intentionally integrating coaching elements into various talent management processes (i.e., leadership development, promotions, performance review, succession planning, etc.) (Chart 9). They have goals of helping every leader become a better coach, so all employees have access to the benefits of coaching, not just the few.

Chart 9

Integrating coaching into talent management and developing leaders throughout the company are key strategies for developing a coaching culture

How does your company develop and promote a culture of coaching? (n=111)



Source: The Conference Board, 2019.

External Coaching

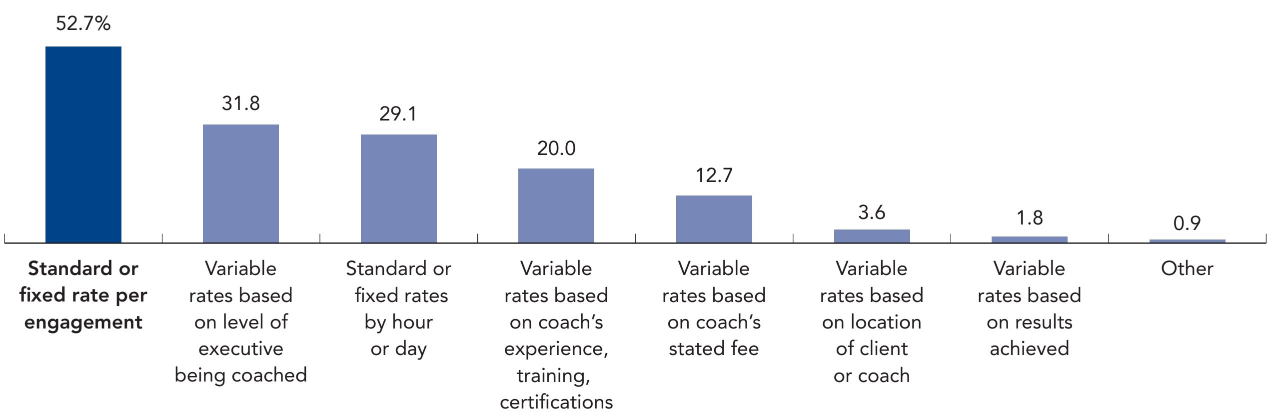
Rates and compensation

Other than increases in hourly rates, how coaches are paid have remained fairly consistent over the last several years. Companies also continue to pay coaching rates primarily in standard or fixed rates per engagement (Chart 10). Consistent with previous years, external coaches are rarely reimbursed for their travel expenses (less than 10 percent of the time). In addition, most external coaches are not reimbursed for external assessments of their coachees. Our assumption is that the prices of travel and external assessments are "baked in" to the cost of the external coach instead of itemized.

Chart 10

Standard and fixed rates remain dominant in how coaches are paid

How are your company's external coaching rates structured? (n=110)

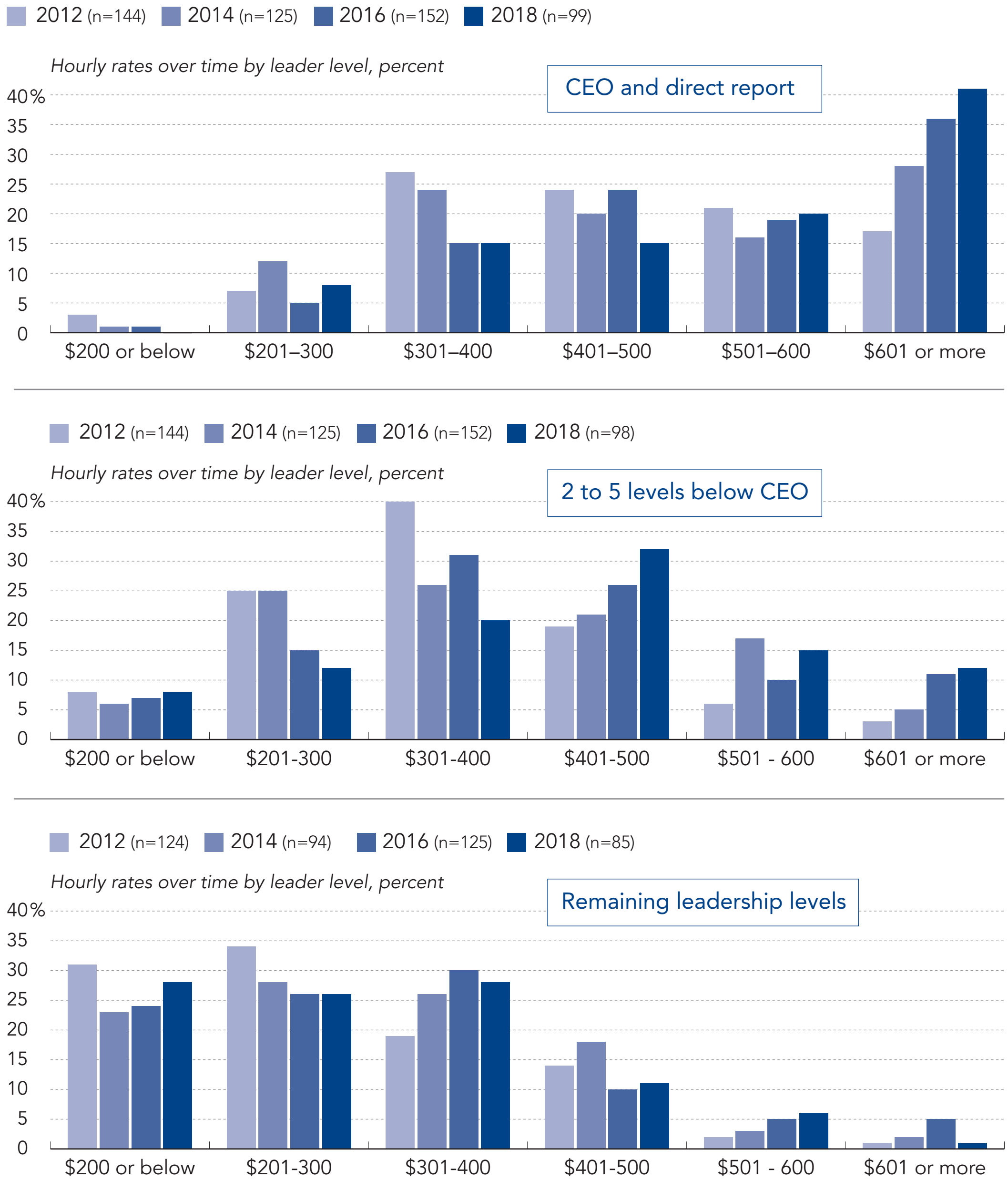


Source: The Conference Board, 2019.

Over time, what coaches are paid has shifted upward, though not dramatically. One exception is the rate paid to coach CEO and direct reports (Chart 11). The data continue to show an upward trend in this category. At 2 to 5 levels below CEO, there was a shift and increase of companies paying a higher hourly rate at the range of $401 to $500 per hour. For remaining levels of leadership, rates have not shifted much and remain consistent with prior years.

Chart 11

External coaching rates increased, especially at the top of the house



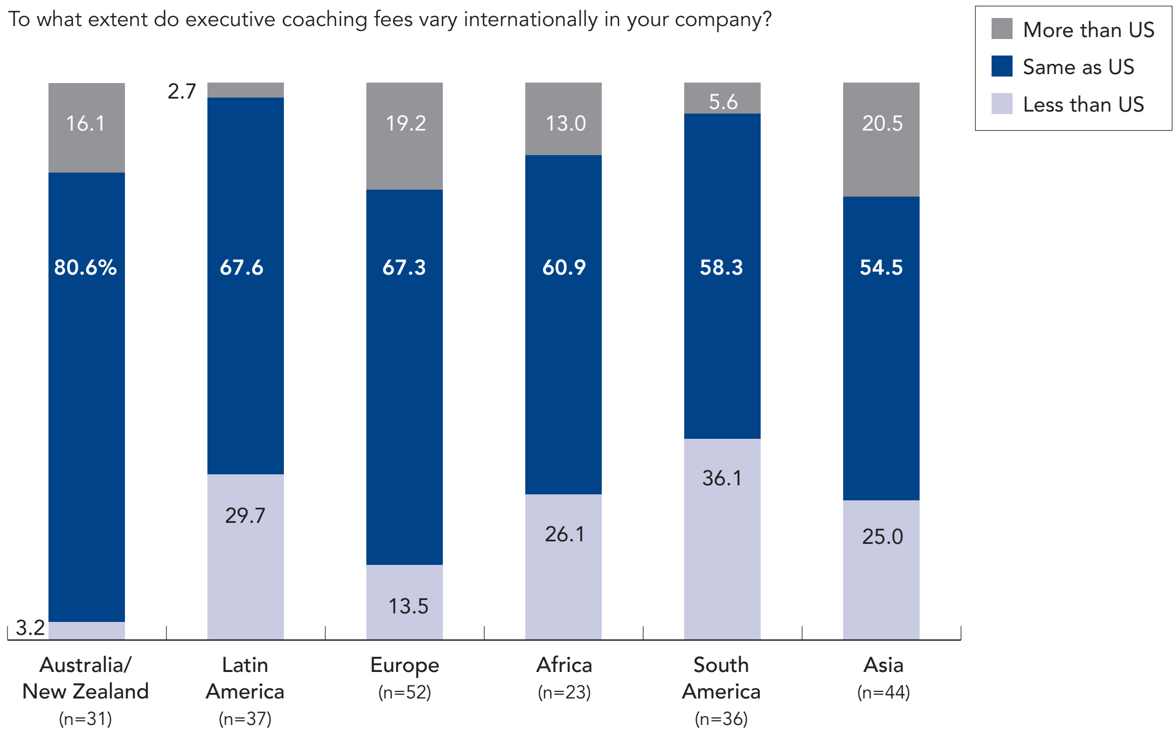
Source: The Conference Board, 2019.

As in previous years, in 2018, we found that the majority of regions around the world are paying coaching rates similar to those paid in the United States (Chart 12). Specifically, the alignment is greatest in Europe, Australia/New Zealand, and Latin America.

Chart 12

Globally, the majority of regions are paying similar coaching rates as the United States

To what extent do executive coaching fees vary internationally in your company?



Source: The Conference Board, 2019.

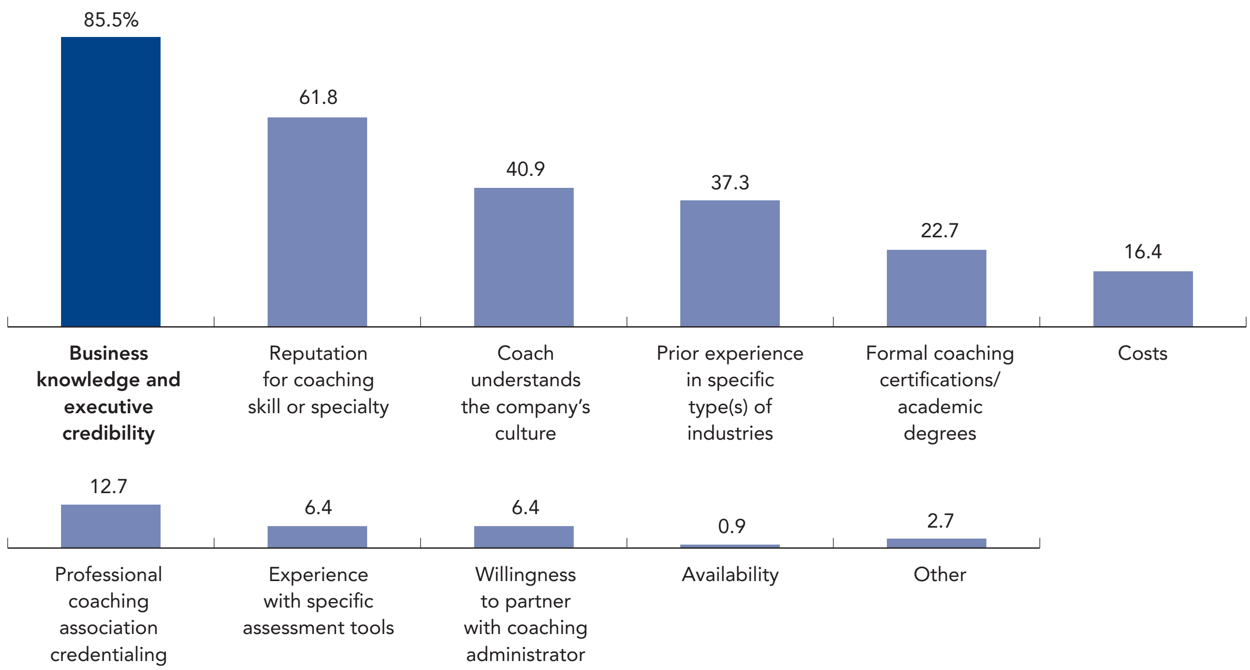
Selection and onboarding

Business knowledge and executive credibility and coaching skill reputation remain the top two choices for coach selection criteria; however, understanding the company's culture edged out prior industry experience for third (Chart 13).

Chart 13

The top selection criterion for external coaches is business knowledge and executive credibility

What are the top three most important criteria for selecting external coaches? (n=110)



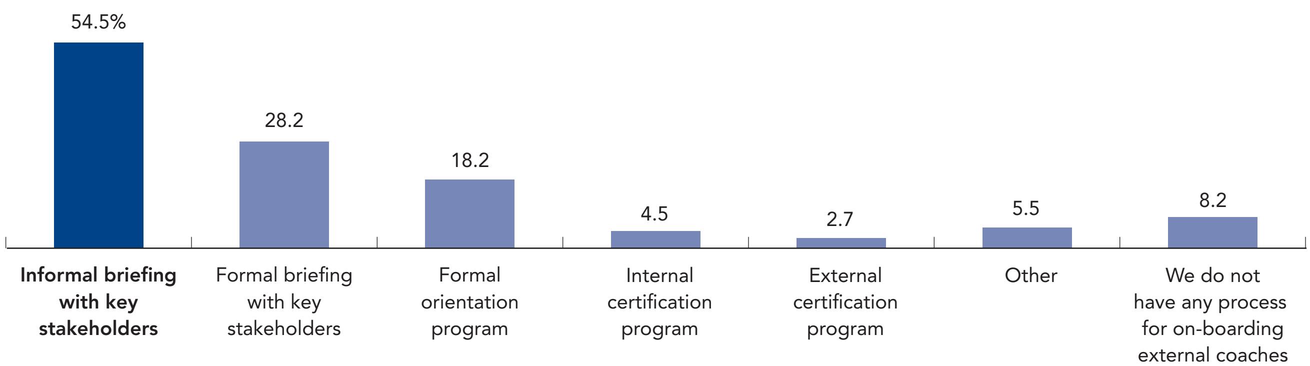
Source: The Conference Board, 2019.

To onboard external coaches, more than half of companies surveyed (55 percent) conduct an informal briefing with key stakeholders. Forty-six percent of companies have a formal orientation or a formal briefing for onboarding external coaches (Chart 14). Regardless of how external coaches are onboarded, organizations should provide a complete description of the organization culture, its processes, and key players to the coach to support targeted coaching conversations.

Chart 14

Organizations rely on informal and formal processes to onboard external coaches

How does your company onboard external coaches? (n=110)



Source: The Conference Board, 2019.

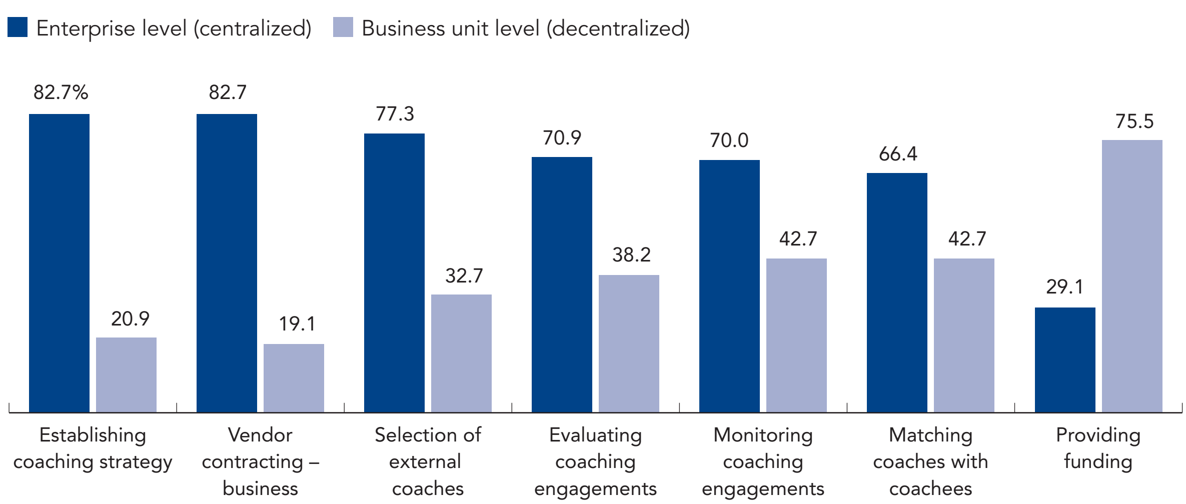
Accountability

With the exception of funding, most companies place the majority of accountability for external coaching at the enterprise level (Chart 15). This centralized approach has remained consistent over the last decade.

Chart 15

Most coaching functions remain centralized at the enterprise level

Where is accountability placed for the following coaching initiatives within your company? (n=110)



Source: The Conference Board, 2019.

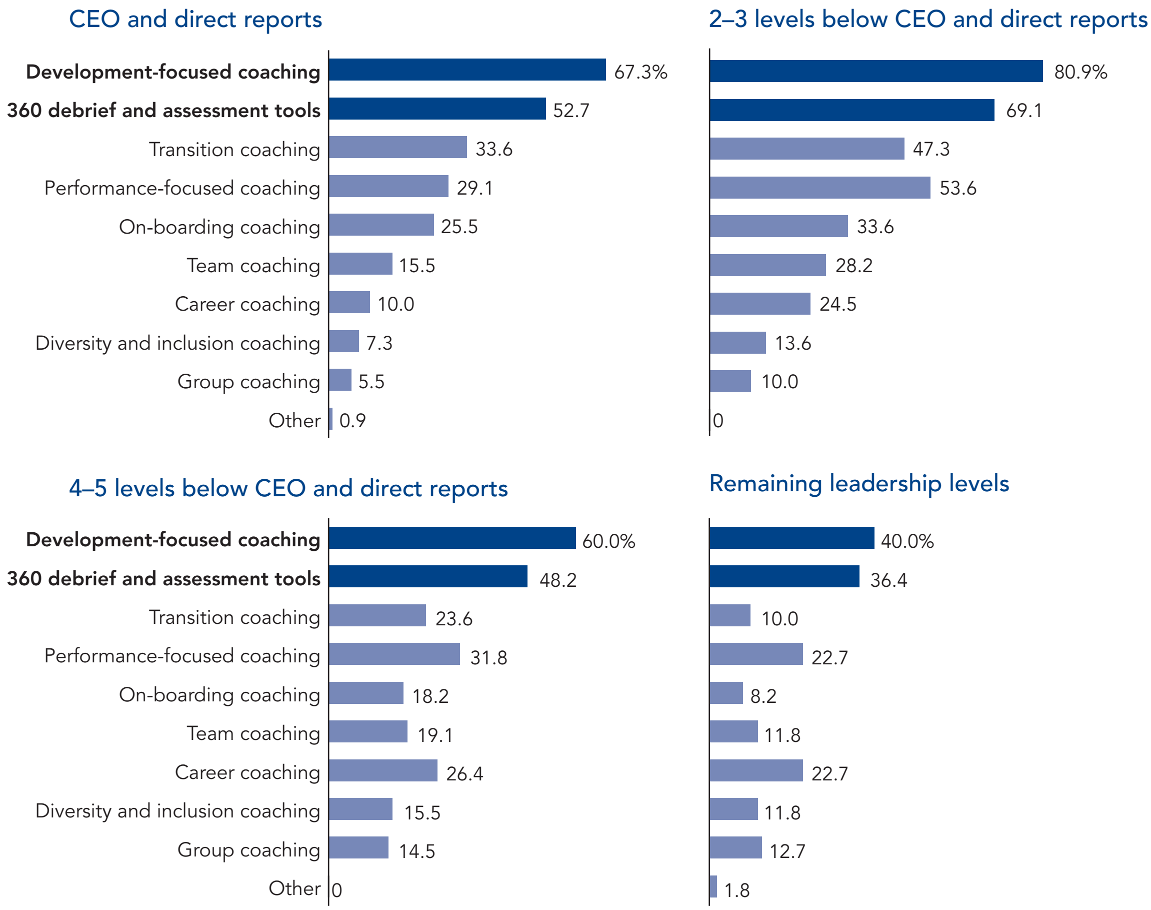
Types of coaching per leader level

Similar to our 2016 survey results, the top two coaching types in 2018 by all leader levels are development-focused and 360 debrief/assessment tools (Chart 16). Performance-focused coaching is the third most-common type for all levels except the CEO and direct reports, who are slightly more focused on transition coaching. Given the focus on inclusion and teams within businesses today, it is somewhat surprising to see that diversity and group coaching are the lowest-ranked coaching types.

Chart 16

Development focused and 360/debrief assessment are the top two types of coaching regardless of the level of leader

At what executive levels are the following types of external coaching targeted? (n=110)



Source: The Conference Board, 2019.

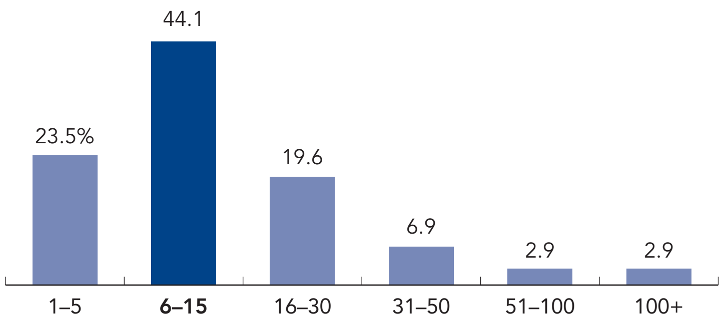
Coaching engagements

With limited resources for coaching, effective and efficient use of coaches is a goal for many organizations. More than two-thirds of organizations (68 percent) contract up to 15 external coaches per year (Chart 17). Larger companies with more than 50,000 employees are more likely to hire 16 or more external coaches. Almost two-thirds of organizations (63 percent) assign 30 or fewer leaders to an external coach for an engagement (Chart 18). The length of coaching engagements has been shortening over the past few years and appears to have settled commonly at the six-months mark (Chart 19). More than half of companies in this study selected this length of time for their coaching engagements. Of note, another 40 percent have coaching engagements that range from 7 months to 12 months. The length of engagements should correlate to the need and purpose of coaching and may vary according to coachee.

Chart 17

Most companies are hiring six to 15 coaches per year

Approximately how many external coaches do you contract with per year? (n=102)

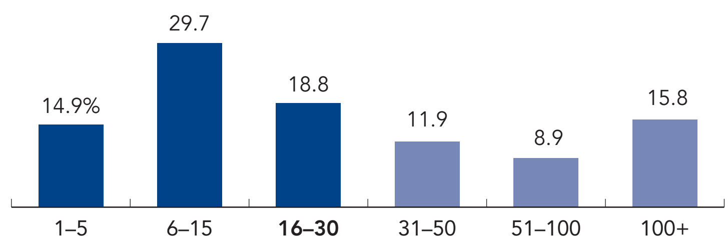


Source: The Conference Board, 2019.

Chart 18

Most organizations assign 30 or fewer coachees to external coaches

Anually how many coachees are assigned engagements with external coaches in your company? (n=101)

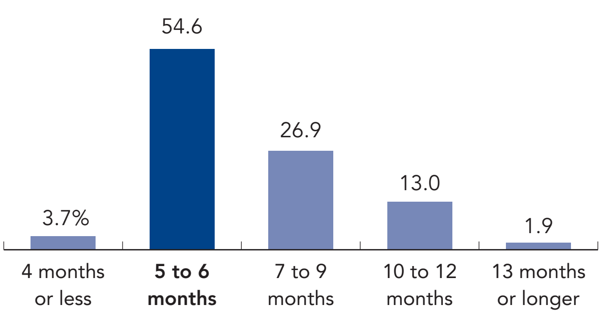


Source: The Conference Board, 2019.

Chart 19

Many companies focus coaching engagements to specific needs and for a set duration of time, mostly around 6 months

What is the average length of time for a typical external coaching engagement in your company? (n=108)



Source: The Conference Board, 2019.

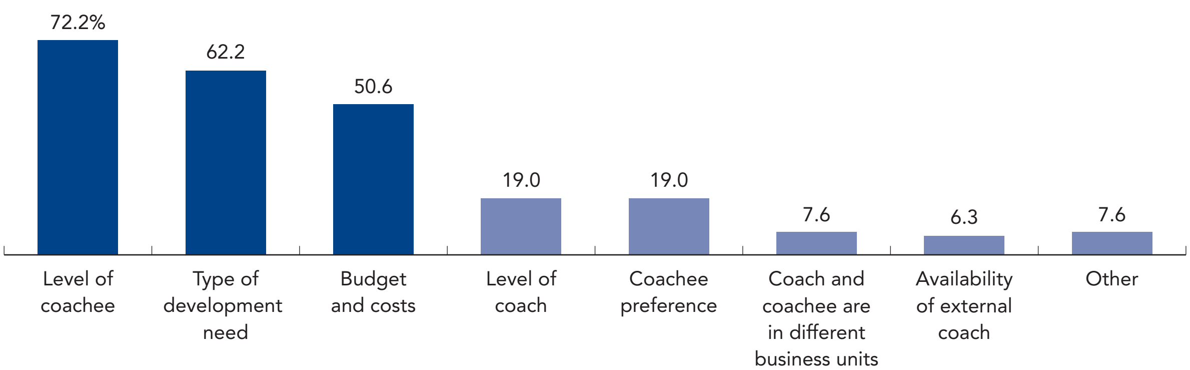
Internal Coaching

Internal coaching continues to become more prevalent as organizations realize that coaching also benefits employees at lower levels, not just senior executives. An internal coaching practice requires leadership support, careful planning, rigorous training, and dedicated coaches. The choice of an internal coach or an external coach is primarily determined by three criteria: (1) the level of coachee (72 percent), (2) the type of development need (62 percent), and (3) the budget/costs (51 percent) (Chart 20).

Chart 20

Organizations choose an internal coach versus an external coach after weighing multiple criteria

How does your organization decide when to use an internal coach versus an external coach? (n=79)



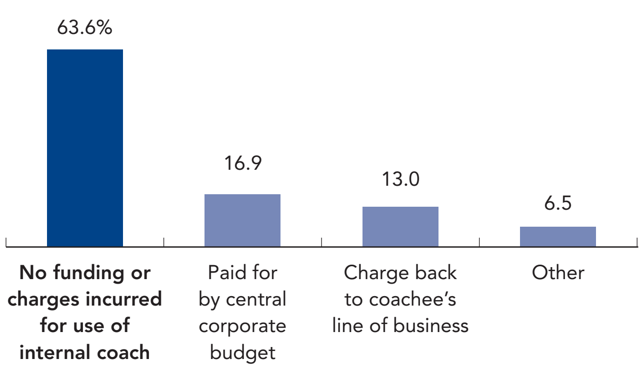
Source: The Conference Board, 2019.

Almost two-thirds of organizations (64 percent) do not incur charges for the use of internal coaches, making internal coaching extremely attractive to companies that can't afford the costs of external coaching or to those that want to extend coaching practices to lower levels (Chart 21).

Chart 21

Most organizations do not charge for the use of internal coaches

How are the funding and charges handled at your company for use of an internal coach? (n=77)



Source: The Conference Board, 2019.

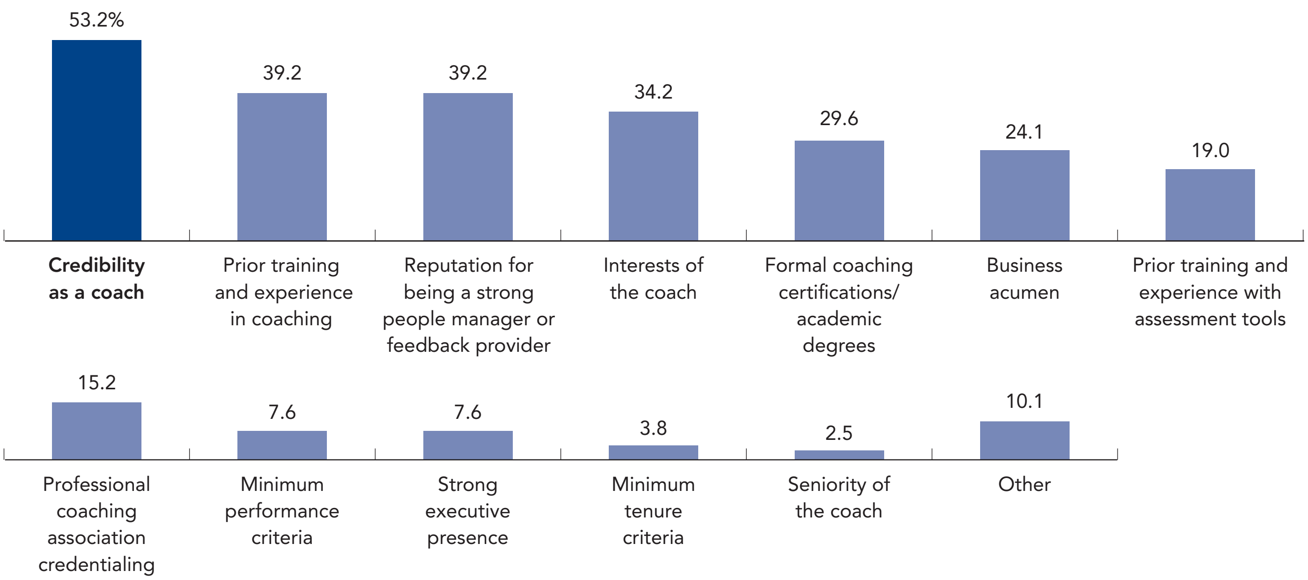
Selection and preparation

The top three selection criteria for internal coaches are (1) the credibility as a coach, (2) prior training and experience in coaching, and (3) reputation for being a strong people manager or feedback provider. We found it interesting that over a third of organizations (34 percent) also consider the interests of the internal coaches (Chart 22).

Chart 22

The credibility as a coach is the top selection criteria for half of the companies surveyed

What are the top three most important criteria for selecting your company's internal coaches? (n=79)



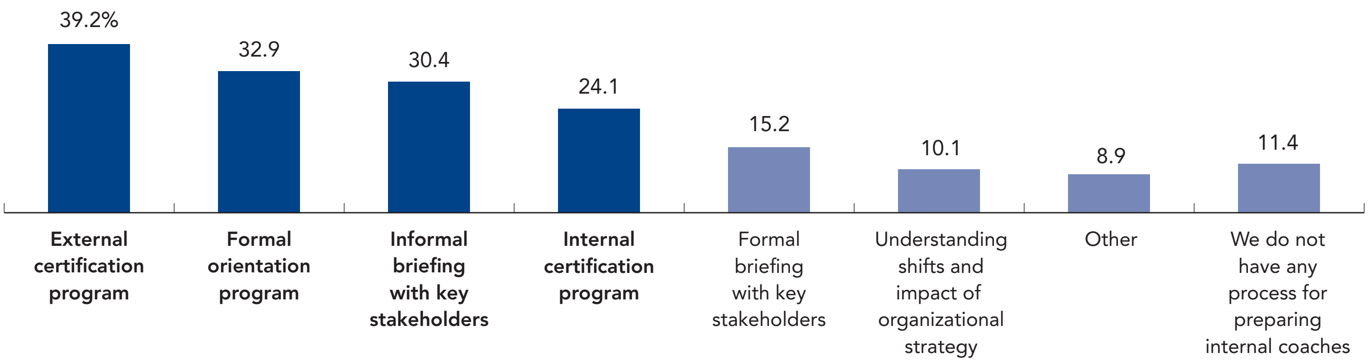
Source: The Conference Board, 2019.

The vast majority of organizations seem to take internal coaching seriously, as most are doing at least two things to prepare internal coaches. In terms of formal preparation, 39 percent require internal coaches to have an external certification, and 33 percent hold formal orientation programs. In terms of more informal preparation, 30 percent hold informal briefings with key stakeholders, and 24 percent require an internal certification program (Chart 23).

Chart 23

Organizations spend time and resources to prepare their internal coaches

How does your company prepare internal coaches? (n=79)



Source: The Conference Board, 2019.

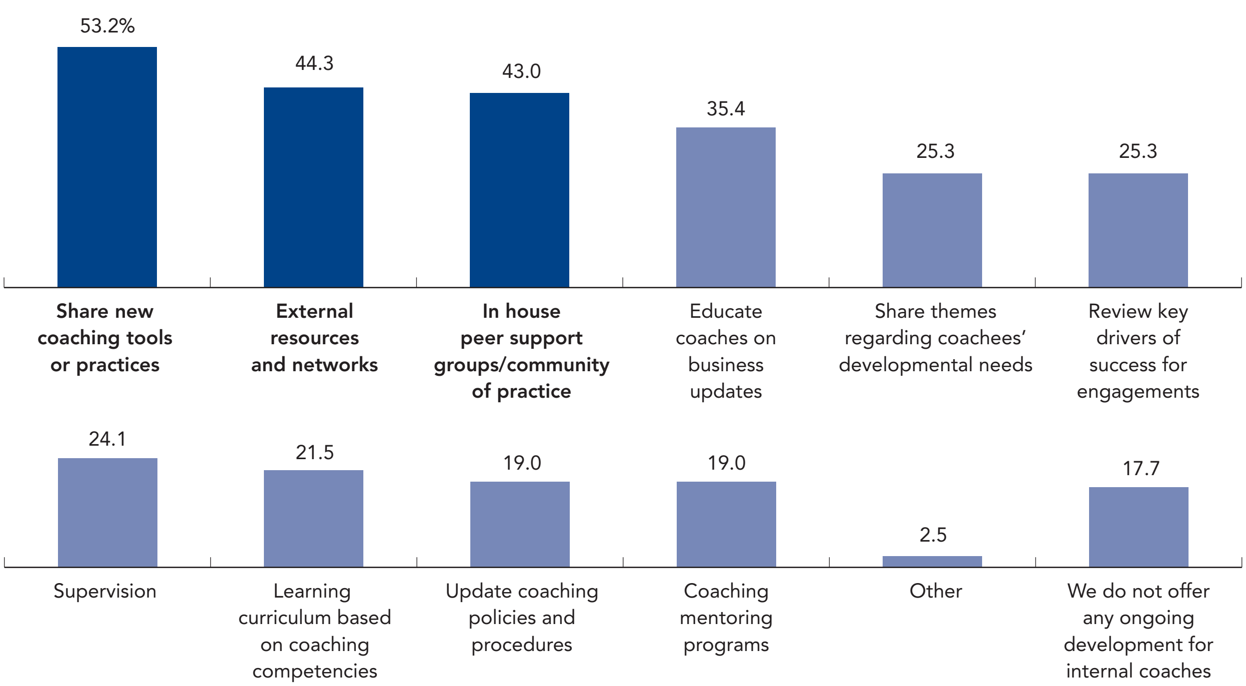
Development of coaches

The majority of organizations use a wide variety of methods to develop coaches. The top three development methods are (1) sharing new coaching tools or practices, (2) external resources and networks, and (3) in-house peer support groups/community of practices (Chart 24).

Chart 24

Organizations understand all coaches need ongoing development to keep their skills and practices current

How does your company provide ongoing development opportunities to its internal coaches? (n=79)



Source: The Conference Board, 2019.

Approximately two-thirds (65 percent) of surveyed organizations provide supervision for internal coaches (Chart 25). The majority of organizations use at least two different supervision methods, with providing feedback and reflection and developing coaching skills and knowledge tied for first place.

Chart 25

Coaching supervision may support coaches regarding needs across the organization

Our company provides coaching supervision to our internal coaches in order to…
(n=79)

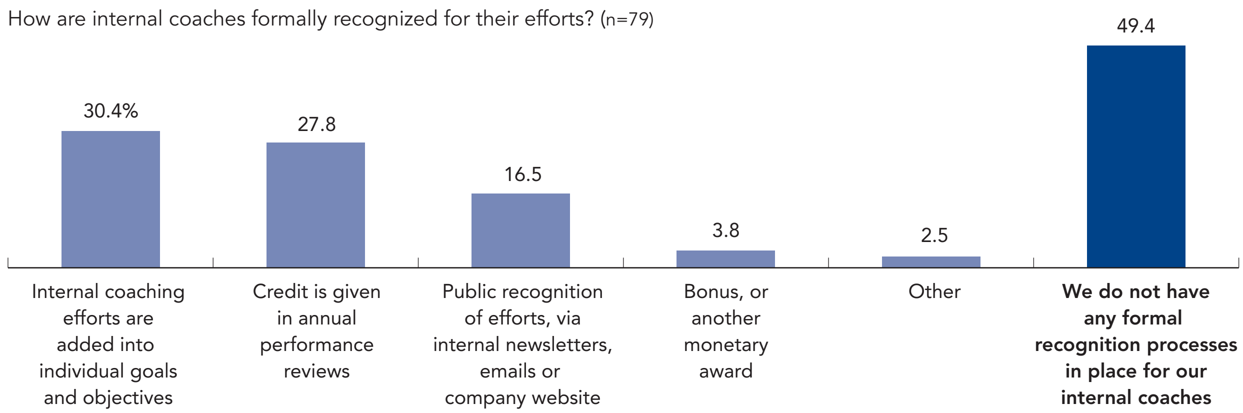
Source: The Conference Board, 2019.

While internal coaching is rising in importance, unfortunately, almost half of surveyed organizations do not have formal recognition processes for internal coaches (Chart 26). Those that do typically use a combination of recognition types with internal coaching efforts added into individual goals and objectives and/or giving credit in annual performance reviews.

Chart 26

Almost half of surveyed organizations do not have formal recognition processes for internal coaches

How are internal coaches formally recognized for their efforts? (n=79)



Source: The Conference Board, 2019.

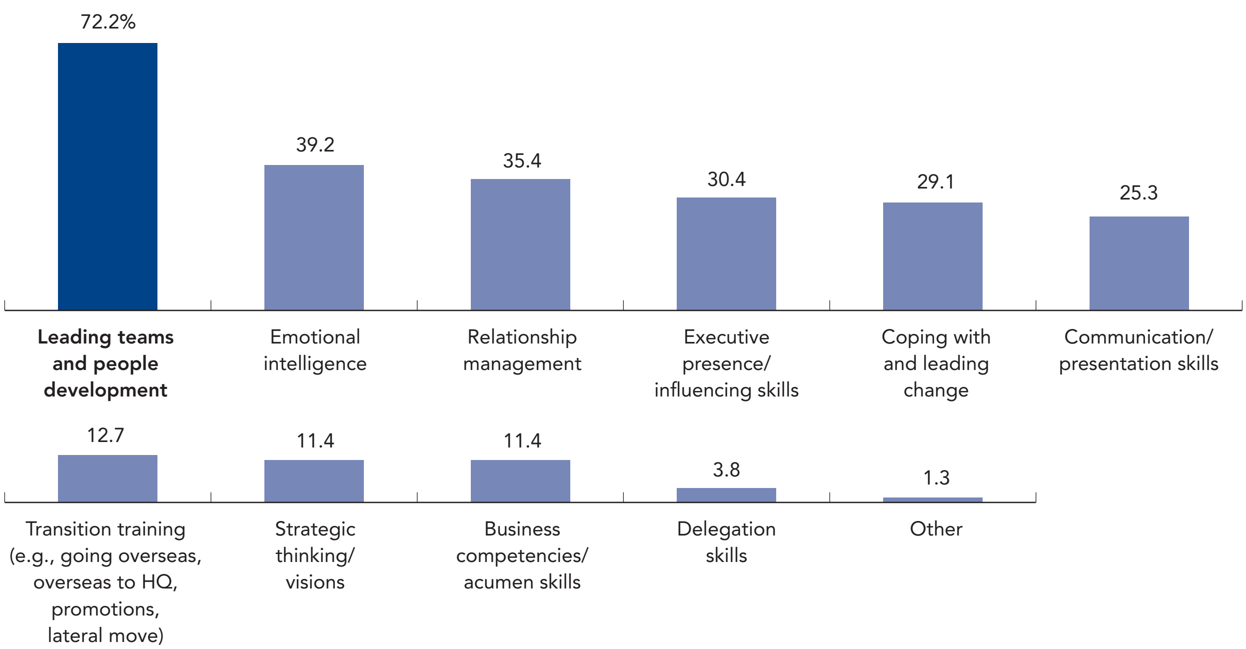
Coaching engagements

Similar to external coaching, leading teams and people is by far the most frequent internal coaching topic—covered by 72 percent of organizations (Chart 27). Emotional intelligence and relationship management round out the top three topics (39 percent and 34 percent, respectively). The management of internal coaching has not shifted much in how the coaching work is delivered and implemented. Almost two-thirds of organizations (64 percent) have one to 15 internal coaches (Chart 28).

Chart 27

Leading teams and people development is by far the most frequently covered internal coaching topic

What are the top three most frequent topics covered across all internal coaching assignments? (n=79)

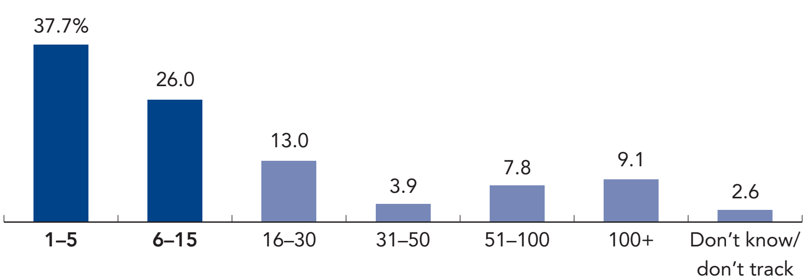


Source: The Conference Board, 2019.

Chart 28

Almost two-thirds of organizations have between one and 15 internal coaches

Approximately how many internal coaches are there in your company? (n=77)



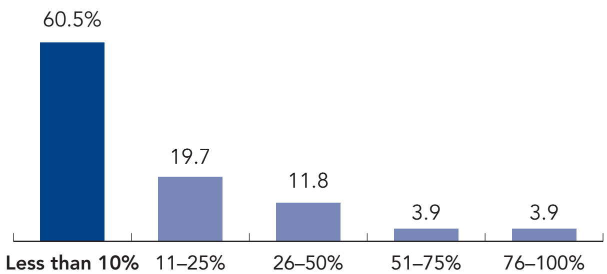
Source: The Conference Board, 2019.

A majority of internal coaches (60 percent) do the work part-time, spending less than 10 percent of their time to coaching (Chart 29). Internal coaches are typically assigned fewer coachees than external coaches, with the majority of internal full- and part-time coaches having between one and five coaches (Chart 30).

Chart 29

Most part-time internal coaches spend less than 10 percent of their job devoted to coaching

Approximately what percent of their job do part-time internal coaches devote to coaching? (n=76)

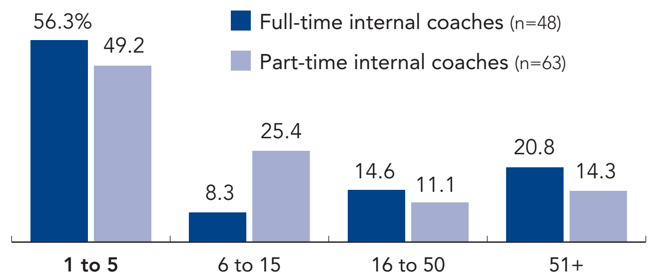


Source: The Conference Board, 2019.

Chart 30

Most full- and part-time internal coaches have between one and five coachees

Approximately how many coachees do internal coaches work with per year?



Source: The Conference Board, 2019.

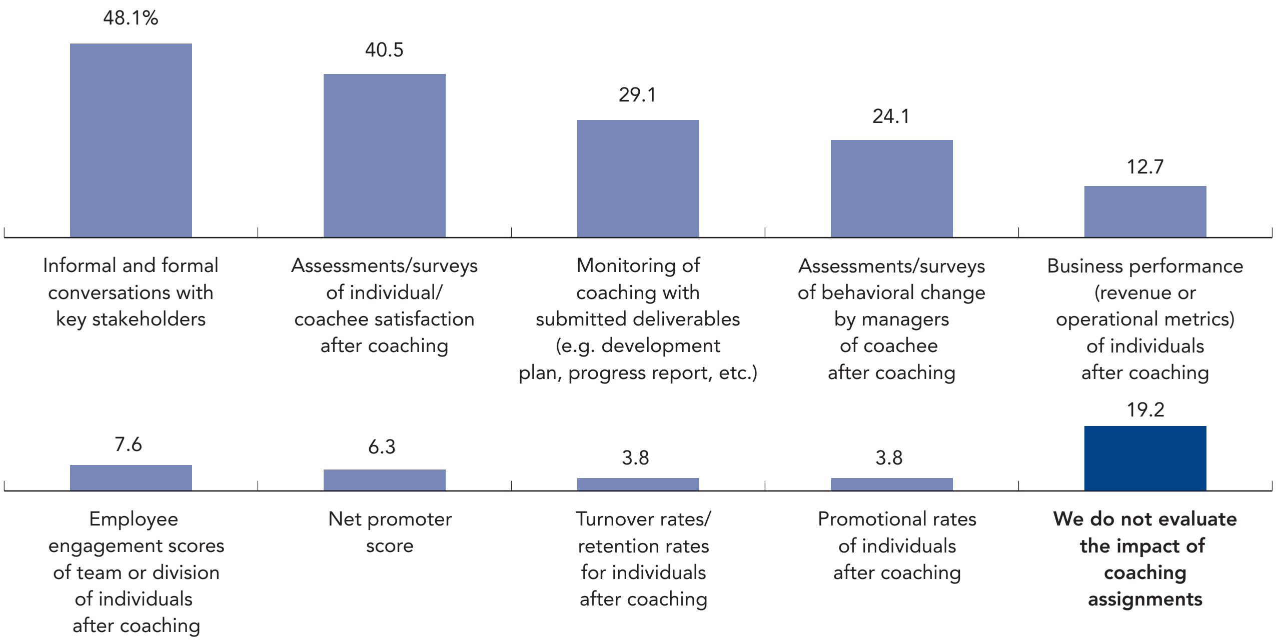
Evaluation

Similar to external coaching practices, evaluation of internal coaching work remains a challenge. Almost 20 percent of organizations do not evaluate internal coaching, much higher than external coaching at six percent (Chart 31). The top three evaluation methods of internal coaching are the same for external coaching. Additionally, the first evaluation method for both is the same—informal and formal conversations with key stakeholders. Internal coaching relies more on coachee assessments and surveys (41 percent) than on monitoring of coaching with submitted deliverables (29 percent). Conversely, external coaching relies more on monitoring of coaching with submitted deliverables (49 percent) than coachee assessments and surveys (40 percent). As a result of these evaluation approaches, executives felt lower levels of confidence (Chart 32).

Chart 31

Almost 20 percent of organizations do not evaluate internal coaching, much higher than external coaching

For your company, what are the top three evaluation methods that provide the greatest value in supporting the impact of internal coaching? (n=79)

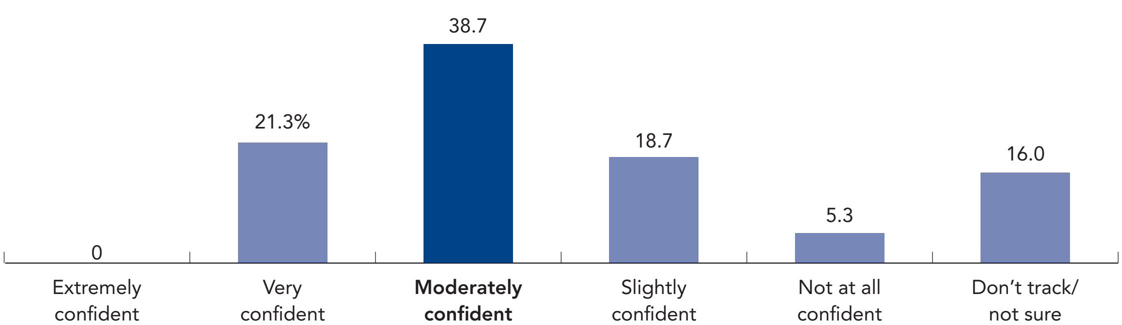


Source: The Conference Board, 2019.

Chart 32

The majority of organizations are at least moderately confident with their internal coaching evaluation methods

Given the evaluations methods you have chosen, how confident are you that the results represent the impact of internal coaching on your leaders? (n=75)



Source: The Conference Board, 2019.

About This Report

The Global Executive Coaching Survey 2018 is the seventh edition of a biennial survey conducted by The Conference Board. The study focuses on how executive coaching is managed within organizations and examines the external and internal coaching practices of profit, nonprofit, and government organizations.

For the 2018 survey there were 118 responses. The 2016 survey had 181 responses, the 2014 survey had 142 responses, the 2012 survey had 162 responses, the 2010 survey had 156 responses, and the 2008 survey had 82 responses.

Members of The Conference Board were the target audience for this survey, including councils, such as The Conference Board Coaching and Leadership Development Council, Council for Talent Management Executives, and The Leadership Development Council. As this is a global survey, the target audience also included talent management councils in Asia and Europe.

Respondent profile

Industry (n=118)

25.4%	Manufacturing
12.7	Financial services
13.6	Consumer services
9.3	Computer, technology & IT
18.6	Healthcare and pharmaceuticals
11.9	Business and professional services
8.5	Government/administration/ not-for-profits/education

Annual revenue (FY2017) (n=108)

19.5%	Less than $1 billion
22.9	$1 billion to less than $10 billion
15.3	$10 billion to less than $20 billion
8.5	$20 billion to less than $40 billion
10.2	$40 billion to less than $80 billion
15.3	$80 billion or more

Full-time employees (n=116)

11.9%	Less than 1,000
18.6	1,000 to less than 10,000
30.5	10,000 to less than 50,000
17.8	50,000 to less than 100,000
19.5	100,000 or more

Number of countries in which the company operates (n=116)

23.7%	1 country
12.7	2–5 countries
9.3	6–10 countries
6.8	11–25 countries
11.9	26–40 countries
4.2	41–50 countries
29.7	More than 50 countries

About the Authors

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