



Teleclass #1

Confidentiality & Managing Stakeholders

Review of OLCC Mentor/Peer Coaching Process



Mentor Coaching

Jen	Stacy
Dennis	Robin
Jennifer	Katie
Terry	Yvette
Joe	Reggie
Fred	Tina

Recorded Coaching Sessions

Submit recording on or before 3/12

Complete Call before 3/30.

Practice/Peer Coaching

Dennis	Robin
Jennifer	Katie
Tina	Reggie
Joe	Yvette
Fred	Terry

Confidentiality & Managing Stakeholders

ICF Key Definitions

- **“Coaching Relationship”**—a relationship that is established by the ICF Professional and the Client(s)/Sponsor(s) under an agreement or a contract that defines the responsibilities and expectations of each party.
- **“Client”**—the individual or team/group being coached, the coach being mentored or supervised, or the coach or the student coach being trained.
- **“Sponsor”**—the entity (including its representatives) paying for and/or arranging or defining the coaching services to be provided.
- **“Conflict of Interest”**—a situation in which an ICF Professional is involved in multiple interests where serving one interest could work against or be in conflict with another. This could be financial, personal or otherwise.

What is confidentiality?

Protection of any information obtained around the coaching engagement unless *written* consent to release is given.

Our Responsibility to Clients

1. Explain and ensure that, prior to or at the initial meeting, my coaching Client(s) and Sponsor(s) understand the nature and potential value of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement.
2. Create an agreement/contract regarding the roles, responsibilities and rights of all parties involved with my Client(s) and Sponsor(s) prior to the commencement of services.
3. Maintain the strictest levels of confidentiality with all parties as agreed upon.
4. Have a clear understanding about how information is exchanged among all parties involved during all coaching interactions.
5. Have a clear understanding with both Clients and Sponsors or interested parties about the conditions under which information will not be kept confidential (e.g., illegal activity, if required by law, pursuant to valid court order or subpoena; imminent or likely risk of danger to self or to others; etc.). Where I reasonably believe one of the above circumstances is applicable, I may need to inform appropriate authorities.

Our Responsibilities to Clients Cont'd

7. Maintain, store and dispose of any records, including electronic files and communications, created during my professional interactions in a manner that promotes confidentiality, security and privacy and complies with any applicable laws and agreements.
8. Remain alert to indications that there might be a shift in the value received from the coaching relationship. If so, make a change in the relationship or encourage the Client(s)/Sponsor(s) to seek another coach, seek another professional or use a different resource.
9. Respect all parties' right to terminate the coaching relationship at any point for any reason during the coaching process subject to the provisions of the agreement.
10. Be sensitive to the implications of having multiple contracts and relationships with the same Client(s) and Sponsor(s) at the same time in order to avoid conflict of interest situations.
11. Be aware of and actively manage any power or status difference between the Client and me that may be caused by cultural, relational, psychological or contextual issues.
12. Disclose to my Clients the potential receipt of compensation, and other benefits I may receive for referring my Clients to third parties.

What Confidentiality does NOT Cover

- Threat to themselves or others
- Illegal activity

A large blue arrow pointing to the right, split horizontally into two shades of blue: a lighter blue on top and a darker blue on the bottom.

Common Scenarios

- Internal Coaching
- Stakeholder management: 360 reviews and progress requests
- Using testimonials from current/former clients

Internal Coaching

“Internal Coach” - an individual who is employed within an organization and coaches either part-time or full-time the employees of that organization.

Two key things to consider:

- 1) Keep everything your client shares confidential
- 2) Manage conflict of interests with Clients and Sponsors through:
 - Coaching agreements
 - Addressing organization roles, responsibilities, and relationships
 - Maintaining confidentiality when reporting and keeping records

Sponsor and Stakeholder Involvement

- Who else might be involved? HR representative, Client's boss, and/or Executive leadership.
- The client, in partnership with the sponsors, determine which other stakeholders to include.
- The involvement of sponsors and stakeholders need to be transparent to the client.
- The goal is to create alignment— when everyone in the process share a similar vision for the engagement and developmental objectives.

Sponsor Touchpoints

1. During the interview process
2. During the contracting phase
3. (optional) soliciting feedback from a 360 assessment or interview
4. When client creates development goals
5. As support during the implementation of the plan and for providing feedback and course corrections
6. Conclusion of coaching

Adapted from *Becoming an Exceptional Exec Coach*, Michael Frish

Testimonials

- Often client's will share their amazing results and progress. Please share— with permission.
- Ask a client if you can use their name/title/company before publishing.



Structure of a Stakeholder Alignment Meeting (Developmental Goals)

Coach welcomes everyone and explains the purpose of meeting is find alignment on development plan.

Then, client shares:

- Their top strengths (5-7)
- Their biggest growth opportunities (3-5)
- Specific actions they will take to achieve goals
- Measurements of success

Next, client invites stakeholders to offer feedback on goals and actions. What did they miss? What else would the stakeholder like the client to consider? How will stakeholder measure progress?

Sample Contracts

Client Contract:

<https://coachfederation.org/app/uploads/2017/11/SampleCoachingAgreement.pdf>

Three Party Coaching Agreement:

https://coachfederation.org/app/uploads/2018/01/SampleCoachingAgreement_ThreeParty_2018.docx

*We are not lawyers, it is advisable to get legal counsel when creating your contract