SURVEY REPORT

THE GIBS COACHING LANDSCAPE

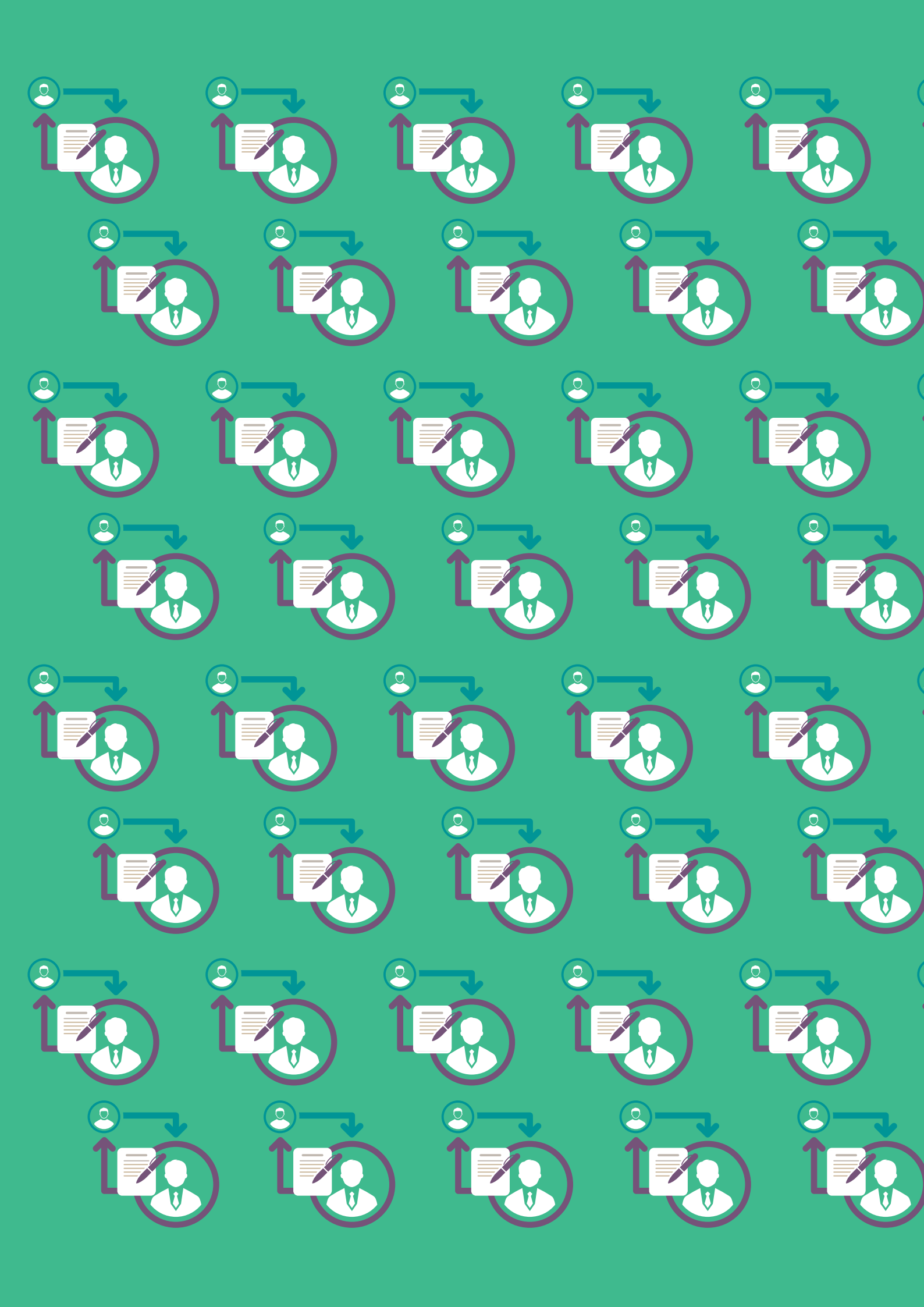
COACH SURVEY REPORT

BY DR NATALIE CUNNINGHAM FOR THE GORDON INSTITUTE OF BUSINESS SCIENCE.



Gordon Institute of Business Science
University of Pretoria

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GIBS www.gibs.co.za

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Coaching@GIBS

The research was undertaken by Dr Natalie Cunningham on behalf of Coaching@GIBS in the Personal and Applied learning department (PAL), part of the University of Pretoria.

PAL is both a centre of excellence and a business unit, which focuses on coaching and facilitation as unique and valuable modes of learning in a business school.

We believe that learning must be personally meaningful for it to be valuable. Personalised learning methodologies, such as coaching and facilitation, are built into most of the programmes at GIBS because of how they enhance learning's impact and sustainability.

The PAL business unit delivers individual executive coaching services as well as specialised programmes on how to become a coach, mentor or facilitator (including professional coach training). The centre houses over 100 of South Africa's best coaches and facilitators, generates research and thought leadership (in coaching and facilitation), and ensures best practice in how the coaching and facilitation is deployed across the School. PAL has a keen interest in how coaching is developing as a profession and practice, and as a leadership development tool.

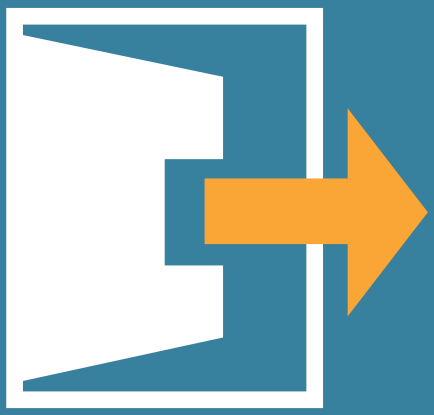


Why?

- The World Economic Forum reports that the Fourth Industrial Revolution (4IR) is about empowering people, not the rise of machines. They predict that the need for "human skills" will grow across all job sectors in the future. To be future-ready in organisations where we have transitioned from command-control management styles of the past to an emphasis on managing interpersonal relationships, these human-centric skills are what make better leaders. Coaching is a crucial leadership development tool for these human skills and is fast becoming the desired management and leadership approach of the future.
- Research indicates that there is an 88% improvement in impact if a management development programme includes both classroom teaching and a form of personalised learning like coaching.
- The "70-20-10" learning principle asserts that 10% of learning occurs in a classroom, 20% occurs through supportive relationships like coaching and mentoring, and 70% occurs on the job. PAL uses coaching to support the additional 20% learning as well as to support on-the-job learning in the flow of work, through developing an organisation's management coaching and mentoring skills.
- In complex, hyperconnected and competitive business environments, and with the emerging 4IR, digital dominance and multigenerational workplaces, it is increasingly important for organisations to cultivate human-centric skills, motivated personal performance and the adaptive capacity for continuous learning.

PAL specialises in leadership development modalities like coaching that enable agile and individual capacities for individual, organisational and societal impact. To contribute to the ever-evolving thought leadership as well as debates, PAL commissioned this set of GIBS coaching Landscape Index reports for buyers of coaching, coaches and coachees.

Introduction



RESEARCH METHODOLOGY

This report provides an overview of the key findings of a 2018/2019 study by GIBS undertaken by Natalie Cunningham. The study was launched in October 2018 and has several phases to the research project. This report focuses on the Coach Survey.

This is one of several reports that will be published during 2020.There are three separate surveys, and collectively each of these surveys will culminate in a GIBS South African Coaching Landscape Report.

- Survey 1 focuses on the coach and the perceptions and experiences of the coach.
- Survey 2 focuses on the coachee/coaching participant. This looks at the experience of being or of having been coached.
- Survey 3 focuses on the buyer of coaching services with the corporate and public sector.

Surveys 1, 2 and 3 collectively form the GIBS Coaching Landscape Report for 2020.

The aim of the research was to understand the current coaching landscape in South Africa. This is the first comprehensive study that integrates and understands coaching from three different perspectives – coach, coachee, and coacher buyer. It allows us to understand the state of play in coaching, combining insights from the various stakeholders in the coaching process.

The surveys were designed in a collaborative way, drawing on and respecting the knowledge and insight of the coaching stakeholders. Initially, the researcher sourced and read a variety of coaching surveys conducted throughout the world to understand the global context and landscape of coaching. Subsequent to this, a first draft questionnaire was structured in each of the categories mentioned above. Next, focus groups with each stakeholder group were held and input from the different stakeholders informed the subsequent research design. The questionnaires were piloted with the various stakeholder groups and a final design was adopted per survey group. The research design and process were submitted to GIBS for ethical clearance and adhered to all ethical guidelines as specified by the University of Pretoria.

The survey was launched on 15 October 2018. The survey was promoted through two established professional coaching bodies in South Africa to their membership – COMENSA and ICF (South Africa). Knowledge Resources, a conference organiser and publisher in the HR, learning and development, coaching, and organisational development space, also shared the research link with their database. GIBS sent the link to all coaches on their database including the professional associates, who are more experienced coaches. GIBS also sent the link to previous students who had attended learning and management programmes where coaching had been provided.

The questionnaires took between 25 and 40 minutes to complete. Many qualitative questions were included, as no previous studies could be used to guide the questionnaire design – e.g., rates coaches were charging. In total:

- **42 coachees completed the online COACHEE questionnaire.**
- **98 coaches completed the online COACH questionnaire.**
- **20 buyers of coaching services completed the online BUYERS questionnaire**

THE STRUCTURE OF THE REPORT

There are five sections:

1. Defining coaching and mentoring
2. Biographical data of the coaches
3. Coaching practice – more about the coach
4. Biographical data of coachees/coaching participants
5. Coaching practice – about the coaching process

Each section begins with a highlighted block, which summarises the findings from that section. If, as a reader, you only want high-level data, just read the summary blocks. The information after each summary block provides the details and some commentary as well as shows the data through an illustration or table.

An integrated report summarising the key findings from the three surveys and including some recommendations is available. This report provides the detail for the coach survey.

If you are interested in high level findings of all three surveys, with GIBS interpretive input, please read the integrated report: The GIBS coaching landscape report. If you would like to delve more deeply into individual findings, or detail, then read the individual surveys. All can be found here: https://www.gibs.co.za/coaching/pages/coaching-resources.aspx

1. Defining coaching and mentoring

Overview and summary of definitions of coaching and mentoring

The definitions were very similar, and the understanding of coaching was seen in a similar light by the majority of coaches. If the coaches' inputs were consolidated to form a **definition of coaching**, it would be as per below.

Coaching is a collaborative, client-centred process that, through a trusting relationship in which a safe space has been created, the coach facilitates a thinking and reflecting process by listening attentively, asking questions, sharing knowledge, supporting and challenging in a non-judgemental way and affirming manner in order to achieve the clients' goals, enhance their sense of well-being and resilience, achieve learning and personal growth, which lead to decisions and actions that add meaning to their lives. The coaching takes place within the context of the individuals' personal and work lives and the broader societal impacts on their lives. The purpose of coaching is growth, learning, managing change and performance.

Mentoring was seen as a more active transference of knowledge with a focus on skills acquisition or teaching concrete knowledge. Mentoring was perceived to be linked directly to the job role and function, and the focus was on skills and improving the ability to do the job.

When mentoring was contrasted with coaching, respondents spoke about mentoring being about guiding and providing solutions, whereas coaching was helping people find their own solutions. The definition was stated as:
Mentoring is a process in which the mentor has industry knowledge and experience and uses his/her knowledge and expertise to advise and guide the mentee/protégé in order for the mentee/protégé to upskill his/her competence.

It is useful to understand how coaches see coaching, so the survey began by asking them to define coaching. This section looks at their definition.

1.1. Defining coaching

Participants were asked to define coaching in their own words. The question was phrased "In your own words, could you define coaching and how you see coaching? We are not looking for a singular correct definition, but rather wanting to understand how different coaches define it. Please understand that this question has no right or wrong answers."

In analysing the array of answers, it became clear that definitions varied in their focus. The definitions focused on the purpose of coaching, the process of coaching, and the specific outcomes of coaching. It was felt that the most appropriate framework in which to analyse the definitions was the framework developed by Cunningham (2017). It has various components, but does not project any methodology or theoretical bias on these. The components of coaching that were identified are:
The coach;

- The client/coachee/executive;
- The context (the business world in which it took place);
- The coaching process;
- An outcome with perceived benefits and challenges; and
- A purpose for coaching.

This is represented graphically in Figure D1 in Appendix D, a framework that guided the analysis.

Much debate has taken place over the fact that coaching definitions vary. If the same aspect/component is being looked at (e.g., outcomes), there would be fewer differences emerging.

Aspects that related respondents shared in relation to the coaching process are highlighted below.

- Creating a safe space – this includes a confidential, trusting space where a person can be themselves.
- Facilitating different thinking/reflecting
- The reflection described was focused primarily on facilitating different thinking. A mechanism to achieve this was through "pinpointing underlying assumptions and beliefs that might be holding a client back from reaching their potential and/or goals".
- The skill of facilitating was described often as "facilitating self-awareness", facilitating a conversation that's "unleashing energy to change what is working and not working".
- The coaching process was seen primarily as a catalytic process.
- Sharing knowledge to assist clients in making decisions
- Listening attentively and asking questions
- A collaborative partnership and relationship
- A client-centred focus
- Supporting and challenging in a non-judgemental way and affirming manner

In terms of coaching outcomes, the following points were mentioned:

- Goal-focused: "helping an individual reach their goals". These goals were often personalised and specific, but many of the goals encompassed some aspects of the personal development, learning and growth.
- Making decisions and taking actions
- Enhancing well-being and resilience
- Personal development and growth. The following sort of statements were used: "coaching is a process of guiding someone to realise their potential"; and "coaching is about empowering a person to unleash their potential". This personal development also included deeper insight and awareness like "Coaching is unlocking awareness, meaning and action". Thus, the subcomponents of this outcome were:
  - reflection,
  - thinking differently, and
  - meaning making.

The context was mentioned broadly as in examples below:

- Deal with change in the world
- Be more effective and efficient in the workplace
- Deal with all components of life

Some people combined the context, such as "enhancing well-being and performance in personal life and work domains." Others stated: "to assist them in achieving their goals in their daily lives."

The aspects mentioned under coaching purpose included the following:

- Personal growth was seen as a key purpose of coaching. This was also phrased as development of the individual or helping people reach their potential.
- Learning was another word that was used – e.g., "Learning to identify and start changing behaviours". One coach quoted Myles Downey and stated: "coaching was the art of facilitating the performance, development and learning of another".
- Some respondents focused on achieving performance as the key purpose of coaching, but this was a lesser focus than personal growth and learning.
- Another purpose that was frequently stated was managing change or transitions.

The definitions were very similar, and the understanding of coaching was seen in a similar light by the majority of coaches. If the coaches' inputs were consolidated to form a definition of coaching, it would be as per below.

INTEGRATED DEFINITION OF COACHING (BASED ON RESPONDENTS' CONSOLIDATED RESPONSES)

Coaching is a collaborative, client-centred process that, through a trusting relationship in which a safe space has been created, the coach facilitates a thinking and reflecting process by listening attentively, asking questions, sharing knowledge, supporting and challenging in a non-judgemental way and affirming manner in order to achieve the clients' goals, enhance their sense of well-being and resilience, achieve learning and personal growth, which lead to decisions and actions that add meaning to their lives. The coaching takes place within the context of the individuals' personal and work lives and the broader societal impacts on their lives. The purpose of coaching is growth, learning, managing change and performance.

The definition is comprehensive and is highlighted in different colours to reflect the various components.

Blue – The coaching process

Pink – The coaching goals/outcomes

Green – The context (within which coaching takes place)

Brown – The purpose of coaching

1.2. Defining mentoring

Participants were asked to define mentoring in their own words. The question was phrased as follows: "In your own words, could you define mentoring and how you see mentoring? We are not looking for a singular correct definition, but rather wanting to understand how different coaches define it. Please understand that this question has no right or wrong answers. There may be different components. Please feel free to elaborate and expand your answer. If you want to share the relationship with mentoring to coaching (if you see one) this would be appropriate to share. Difference or commonalities could be noted."

The terms "advise" and "guide" were used most frequently in describing the role of the mentor. Many people spoke about the mentee/protégé being more junior/less experienced and the mentor being more experienced. Comments included: "The mentor has industry knowledge and experience"; "The mentor is more likely to have experience in the role, industry or situation"; and "The mentor involves a technical component in which the mentor has a superior level of knowledge in a given technical area."

Mentoring was seen as a more active transference of knowledge with a focus on skills acquisition or teaching concrete knowledge. Mentoring was perceived to be linked directly to the job role and function, and the focus was on skills and improving the ability to do the job.

When mentoring was contrasted with coaching, respondents spoke about mentoring being about guiding and providing solutions, whereas coaching was helping people find their own solutions. One respondent said:

I see mentoring as showing someone how to do something (whereas a coach helps a person find their own way... Coaching is about helping a person to dig deeper and gain insight and learning from a better understanding of the world. Coaching is above all about asking great questions, and sometimes the coach shares relevant information. Mentoring is completely different. A mentor is usually more senior in the same field of business who can help the executive to navigate the challenges of leadership based on their experience. A mentor will usually be more directive than a coach and will share a lot more information than a coach. It is entirely appropriate to both have a mentor and a coach at any given point in time.

Less than 5% of respondents felt that the difference was not as significant with comments like: "Not really that different to coaching, following David Clutterbuck who says that good mentoring does not involve giving the answers..."; and "For me it is difficult to separate mentoring from coaching as effective coaches also mentor their clients – so mentoring is transferring wisdom and has no technically defined outcomes." However. this was not the dominant view and the majority of people felt that there was a difference in emphasis.

DEFINITION

Coding with gerunds is a technique used in coding in grounded theory studies. This technique was used to analyse the qualitative answers. Gerunds are words formed from verbs that act as nouns. The benefit of coding with gerunds is that they help provide a strong sense of action. By looking at the actions, it assists us in developing theoretical sensitivity and understanding process (Charmaz, 2014). These words show us how coaching and mentoring are contrasted.

Gerunds used when describing coaching – the actions that happen in coaching	
Facilitating	Challenging (assumptions)
Sharing	Empowering
Unblocking/Unlocking/Uncovering	Respecting
Affirming	Deepening/Heightening (self-awareness)
Unlocking	Creating (a safe space)
Collaborating	Partnering
Enabling/Enhancing/Encouraging	Reflecting

Table 1: Gerunds used when describing coaching and mentoring (derived from respondents)

Gerunds used when describing mentoring – the actions that happen in mentoring	
Advising	Teaching
Guiding	Connecting (mentee to experts)
Transferring	Providing
Cementing (skills)	Telling
Showing	Informing
Giving (advice)	Advising
	Directing

Table 1: Gerunds used when describing coaching and mentoring (derived from respondents)

Some gerunds/actions overlapped and appeared in both groups. These included listening, supporting, helping and inspiring. The difference based on the gerunds highlights the nature of the relationship. The words used for the mentor – such as showing, telling, teaching, providing, and advising – imply a level of expertise, which can be extended to an assumption that mentors are more experienced and knowledgeable than the mentee as they watch, listen and learn. The gerunds for coaching are more based on a relationship of equity and include words like collaborating, sharing, partnering, and co-creating.

When companies are deciding whether to implement coaching or mentoring programmes, it would be very useful to think of these descriptions and use them as a guide to choose the intervention type. If you want to cement skills, direct and inform specific behaviours, then mentoring is the best route. Alternatively, if you want to challenge assumptions and heighten awareness, then coaching would be the obvious choice.

INTEGRATED DEFINITION OF MENTORING (BASED ON RESPONDENTS' CONSOLIDATED RESPONSES)

Mentoring is a process in which the mentor has industry knowledge and experience and uses his/her knowledge and expertise to advise and guide the mentee/protégé in order for the mentee/protégé to upskill his/her competence.

In defining coaching, very little was stated about the coach's characteristics; whereas in defining mentoring, much was shared about the mentor's qualities, such as their technical expertise, their experience, and their role and function within the organisation.

The understanding of both the definitions was widely shared by the coaches completing the survey.

2. Biographical information of coaches

The report follows the framework described in Figure D1 found in Appendix D We begin by looking at the coach. A summary of the key findings of the biographical data of the coach are listed below. The details behind the summary follow with illustrated charts.

Overview and summary of findings for biographical data of coaches

- Of the survey's participants, 68% are female.
- The majority of the participants are aged between 40 and 60 (69%).
- Of the coaches who participated in the survey, 71% are white. This is based on the respondents of this survey.
- 68% of respondents describe their home language as English.
- Of the coaches who participated in the questionnaire, 40% have less than five years' experience in coaching, which shows the relative life stage of coaching in South Africa. However, 11% of coaches have more than 15 years' experience.
- The majority of respondents had several coaching qualifications or training experiences. These were very diverse. It was identified that people had obtained their education and training in coaching through approximately 120 different programmes. A positive aspect is that 51 qualifications (not necessarily people, as some people had both a certificate and a master's degree) were longer than nine months. This includes the certificates, postgraduate diplomas, honours and degrees in the related field.

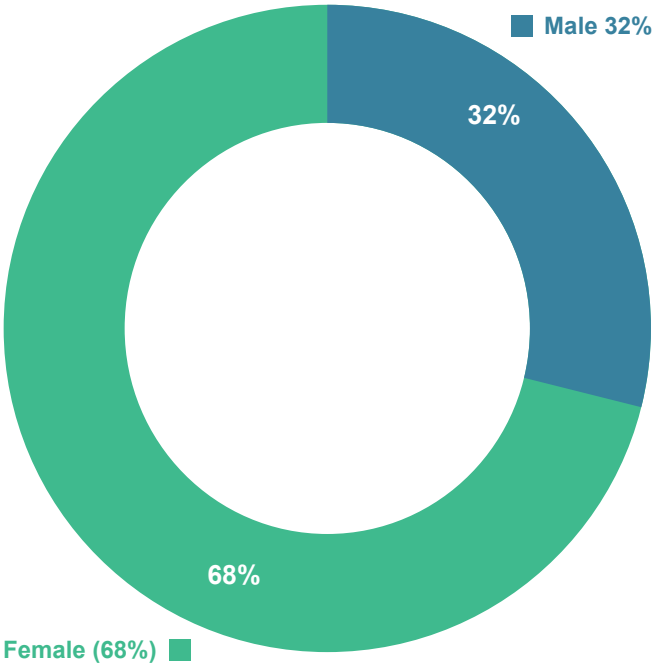


Figure 1: Gender of survey's respondents

The information in the above figure is consistent with the worldwide trend, where 60 to 70% of coaches are female.

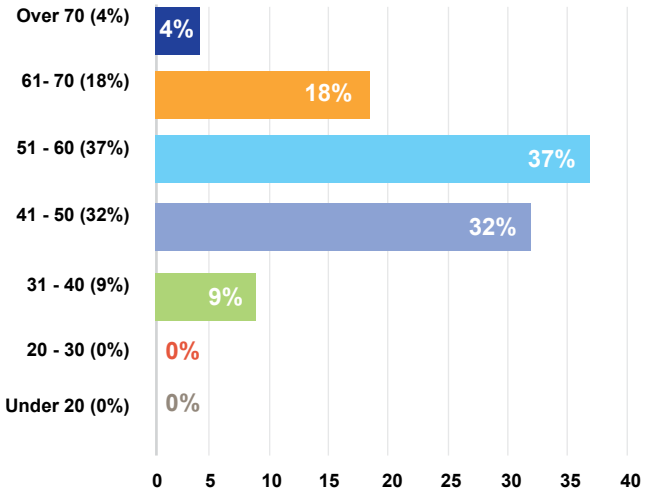


Figure 2: Age of survey's respondents

The majority of the coaches worldwide are aged 30 to 60. South Africa has a slightly higher older coach workforce and has yet to attract younger coaches, as seen in Figure 2 above. Younger coaches still account for a very small percentage of coaches worldwide. One possible reason is that most coaches have entered coaching as a second career and that many coaching qualifications are postgraduate, thus attracting slighter older entrants into the career.

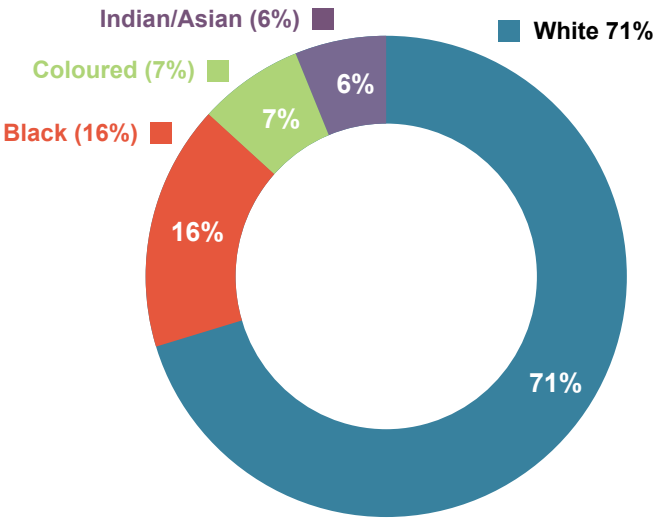


Figure 3: Race of survey's respondents

Figure 3 shows the race representation of the survey's respondents in a percentage form. The bottom of the diagram shows the actual number of respondents. It is useful to recognise that, currently, the pool of trained, qualified coaches does not match the demographics of the country.

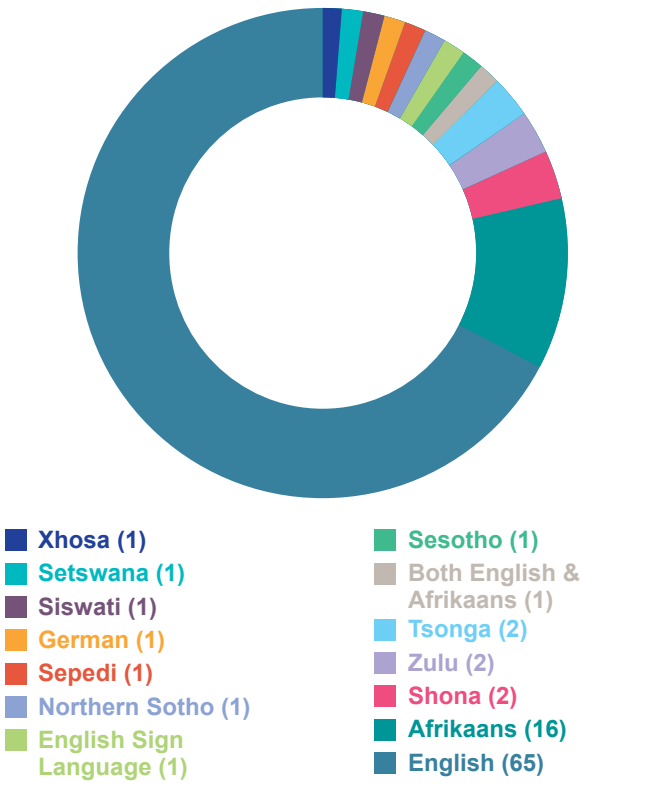


Figure 4: Home language of survey's participants

Figure 4 shows the number of coaches per language, not as a percentage. Whilst English is the main business language, there may be times in the coaching conversation where an individual might prefer to express themselves in their home language. Coach training and educational institutions need to be encouraged to look at the demographics of their student intakes and ensure that they represent diversity in terms of gender, age and language.

Currently, we do not know what languages the coaches conduct coaching in, but an awareness of the diversity of coaches ideally needs to be present as we develop, select and match coaches to clients. Home language, gender, and race are some of the diversity components that we can be aware of.

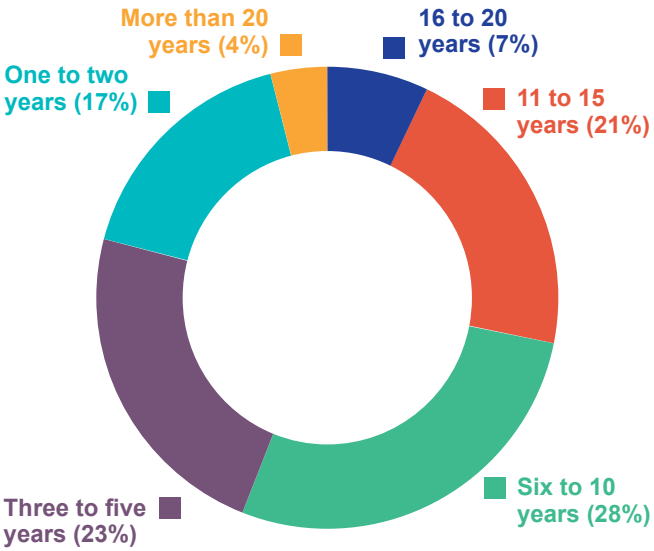


Figure 5: Years respondents have been coaching

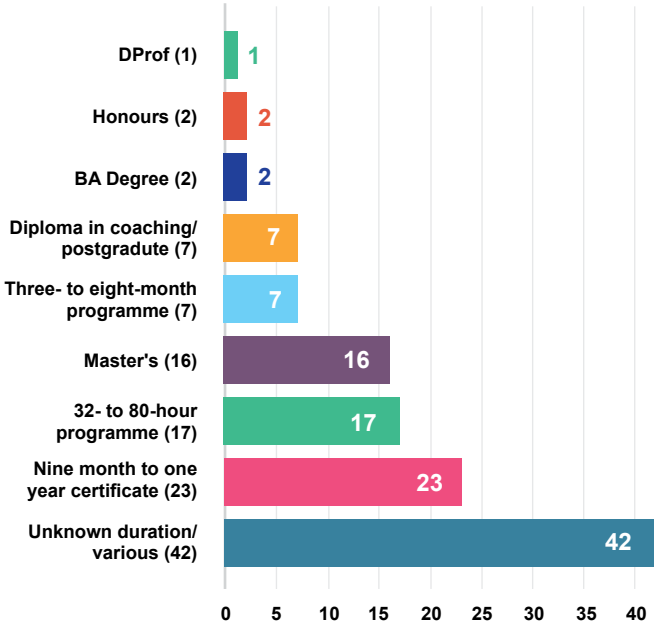


Figure 6: Qualifications

It is interesting to note that the number of coaches with three to five years' experience is similar to the number of coaches with 11 to 15 years' experience. The marketplace needs to be aware of this and be encouraged to appreciate both experience and newly qualified coaches. The benefit of newly qualified coaches is that the quality of coach education and training is consistently improving. The reason for the improvement in coach education is that more research has been done in the coaching space and that the quality coach education providers are drawing this research in their teachings. Coaches with more experience may bring a practical application grounded in their experience to their coaching.

The coaches were asked: "Please list the coaching qualifications you have obtained and the institute or organisation where you obtained this and the duration. Please list all coach qualifications. For example, Advanced Professional Business Coaching Programme, institution GIBS, 81 Hours to complete, ICF accredited." These results are presented in Figure 6 below.

Most respondents had several coaching qualifications or training experiences. A typical response from the coaches listed approximately five courses, so an individual may have a two-day course, followed by a six-month course, followed by a year's certificate and ending with a master's in coaching. Others might not have such a clear path and have a new coach orientation course from Centre for Creative Leadership (CCL), an Integrative Enneagram practitioner course, a course in narrative coaching and an Neuro-linguistic programming (NLP) techniques for coaching course. Therefore, the analysis below is done in numbers not percentages. The respondents' education and training in coaching was made up of approximately 120 different courses and programmes. Many had not stated how long the programme was in duration and when listing that the programme was 80 hours, it could not be confirmed whether this was 80 consecutive hours (i.e., a 10-day programme) or two days a month over five months.

This question alone could warrant a fourth survey. We have surveyed three groups: coaches, coachees, and buyers of coaching. A fourth category would be educators of coaching. The aim of this research was not to analyse this field of coach education, but to highlight where the coaches said they had been educated. A positive aspect is that 51 courses (not necessarily people, as some people had both a certificate and a master's degree) were longer than nine months. The quality of shorter programmes is not under criticism here, but because people spent a considerable period studying coaching, it can be assumed that there would be more time to study more content and possibly drill deeper into the content. This includes the certificates, postgraduate diplomas, honours and degrees in the related field. A few people listed their degrees as their coaching qualifications, whereas others listed their degrees as previous qualifications.

Only a limited number of people shared their accreditations. Two people mentioned that they were Master Practitioners at the Coaches and Mentors of South Africa (COMENSA) society. Four people stated that they had an Associated Certified Coach (ACC) credential from the International Coach Federation (ICF), and four people shared they had a Professional Certified Coach (PCC) credential from ICF. In total, 10 coaches mentioned they were accredited. The question was open-ended and some accredited coaches may not have listed their accreditation, but it appears that accreditation is possibly secondary to qualification in the South African market. This is supported by the coachee survey in the choice of coach, where 67% of coachees felt that the coach needs to be well qualified, and 40% of coachees say that the coach needs to belong to a professional body. Accreditation was not listed as an importance by any coachee.

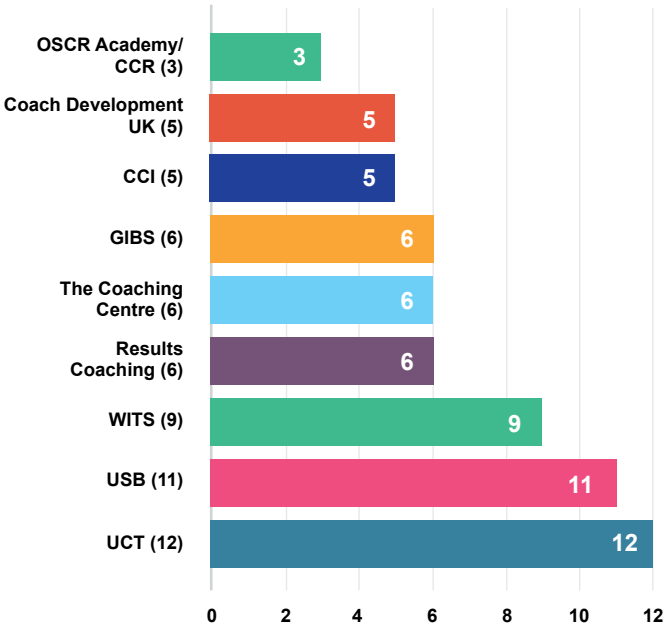


Figure 7: Where coaches' qualifications were obtained

Among the top six institutions, four universities are listed, highlighting the trend towards increasing professionalism. A component of a full profession is often linked to education – e.g., people can only call themselves psychologists if they have a master's degree in psychology. Coaching is not at that stage and it is debatable whether it will ever get to that stage. Drake (2008, p. 16) argues:

> ***...in this changing era, there is little to gain by trying to retroactively fit earlier paradigms. Coaching's future may be better served by transcending our historic squabbles in order to address the unique opportunities of our time. ...Coaching is possibly the first profession to emerge mainly from practice (and the marketplace) rather than from science (and the academy) ... We need a new understanding of a 'profession'. In the end, coaching may be more usefully seen as a network than a profession or field in the traditional sense ... It is an historic opportunity for coaches to redefine what it means to be a professional and how they want to position themselves relative to the foundations of the past, the realities of the present and the needs of the future.***

Different models of community are developing, such as the World Business and Executive Coach Summit (WBECS). This combines a financial business model with a vision "to radically shift the global professional coaching industry towards excellence, by empowering coaches to deepen learning, have high-quality impact on human life, and to give back to the world" (WBECS, 2019).

The WBECS states that it has an engaged community of over 150 000 coaches in 180 countries. It offers several free webinars with leading researchers, coach educators and coaches, and has a strong marketing arm to sell learning programmes. The WBECS has evolved and with the use of technology, it has more coaches linked to it than a professional body like the ICF. We point this out as the debate on what it means to be a professional coach evolves continually.

3. Coaching practice
– more about the coach

The previous section discussed the biographical data of the coach. This section discusses the coach's practice. A summary begins the section and is followed by the commentary and detail.

Overview and summary of findings for more about the coach

The majority of the respondents appear to be coaching in the corporate sector with the descriptions preceding the word coach being leadership (22), executive (21), and business (16) – total 59 (60%). There were only four internal coaches and 12 life coaches.

Sixty coaches derive 50% or less of their income from their coaching. There are only 12 coaches who earn all their income from coaching.

At 62%, the most common form of coaching is individual in-person coaching (in the room together, face-to-face). Seventeen per cent of coaches conduct individual coaching via technology. Team coaching (11%) and group coaching (9%) were almost always conducted in person (in the physical room together).

Eighty-seven coaches were members of professional bodies. The research link was sent out by professional bodies so there could be a potential bias that more coaches who were not members of professional bodies and were not on Knowledge Resources and GIBS databases may not have seen the link. Of the coaches who participated in the survey, 56% were members of COMENSA, 25% were members of ICF, and 14% were members of other professional bodies.

Sixty-four coaches attend supervision, with attendance varying from monthly and quarterly to annually.

Furthermore, 68% of coaches have a business background and 12% of coaches come from a helping profession background.

In terms of rates:

- In executive coaching, the average rate is R2 500 per hour.
- In private coaching, the average rate is approximately R950 per hour.
- In life coaching, 75% of the average rate is R770 per hour.
- In group coaching, the median rate is R2 950.
- In team coaching, 53% of coaches charge R2 400 to R4 000 per hour.
- In middle management coaching, the average rate is R1 800 per hour
- In junior management coaching, the average rate is R1 500 per hour.
- There are newly qualified coaches who are not charging and doing pro bono coaching. Four people were not comfortable sharing their rate. Internal coaches also do not charge.

The respondents were asked to describe themselves as coaches, and could select more than one description from a set of options. Figure 8 indicates the number of times a description was chosen.

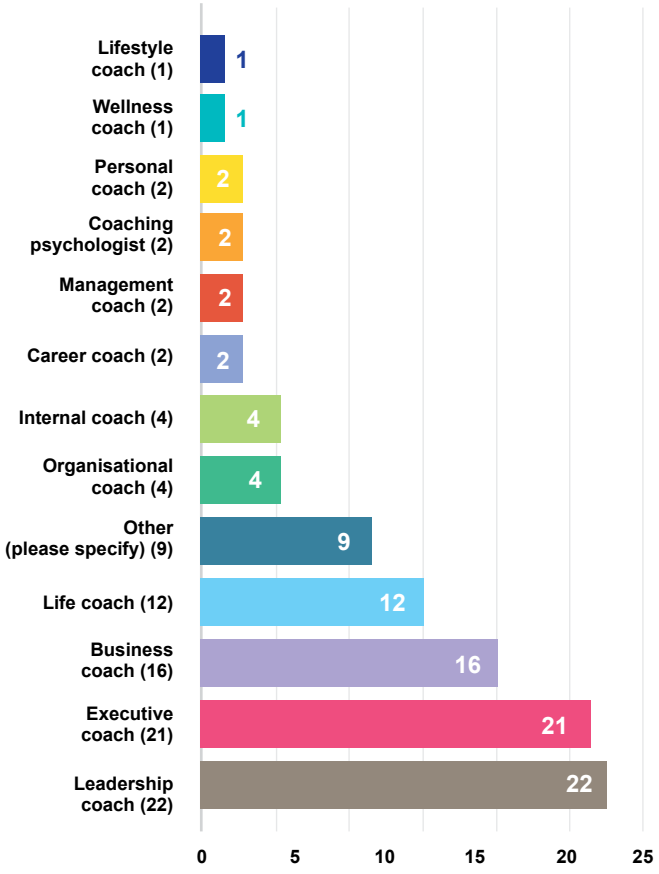


Figure 8: Description as coach

"Leadership coach" and "Executive coach" were the descriptors used by 43 coaches. This does not align with the reason for coaching, which was: firstly, personal development; secondly, career coaching; and thirdly, leadership coaching. It would be useful to see how coach buyers look at the labels coaches use and establish whether these labels assist or not in obtaining work.

The participants of the survey were asked: "What percentage of your income is derived from coaching income? This can include individual and group and team coaching." The answers are reflected in Figure 9.

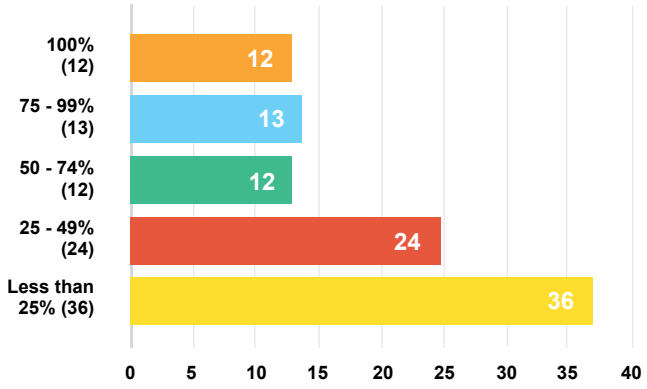


Figure 9: Percentage of income derived from coaching

Of the 36 people who are earning less than 25% of their income from coaching, 13 individuals are not charging as they recently qualified or are still students and are doing pro bono work to build up their hours. A further 11 individuals are internal coaches, and 42 coaches earn additional income from facilitation, training, consulting, teaching or writing. Interestingly, six coaches consciously obtain their income from other sources so that they may coach – e.g., retirement funds, rental of property, disability income, or investments. This shows a commitment to coaching beyond the remuneration of coaching. The fact that only 12 coaches earn their full income from coaching may also be indicative of the maturity level of the industry or other factors like the level of earnings required may vary in individuals.

The coaches were asked to split their coaching among the different coaching types using percentages, with the total adding up to 100%. The results are portrayed in the figure below.

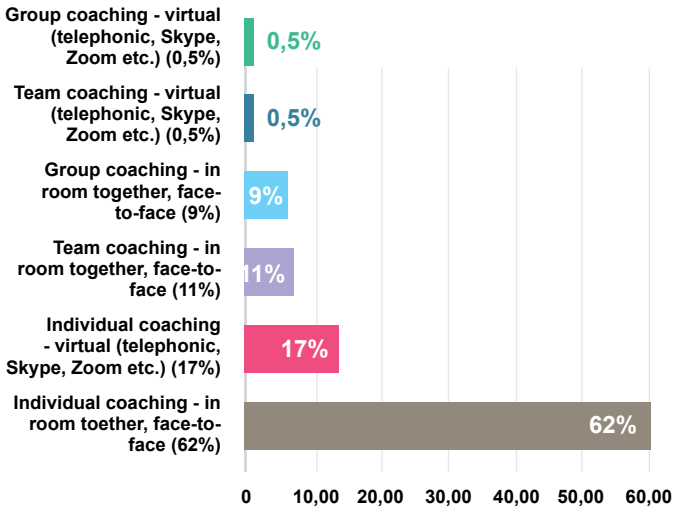


Figure 10: Split among types of coaching

The most frequent coaching experience is individual coaching in the room together, face-to-face, but when one considers the prediction of an increase in group coaching and an increase in use of technology in coaching, it becomes critically important to prepare coaches for this trend. Coach educators need to focus more on group/team coaching education and ensuring their graduates are comfortable with using technology in coaching. Buyers of coaching must check that coaches have training/ education in group coaching as well as experience in group coaching. The transition from individual to group coach requires additional skills and knowledge.

One of the questions in the survey was: "Are you a member of a professional coaching body (e.g., COMENSA, ICF, WABC etc.)? If yes, please elaborate on which professional body you are a member of." This question focused on membership, not accreditation; find the answers in Figure 11. In Figure 12, the names of these organisations are given.

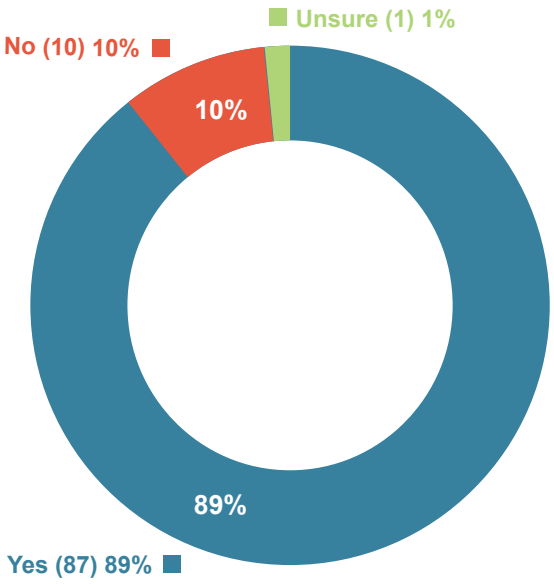


Figure 11: Membership of a professional body

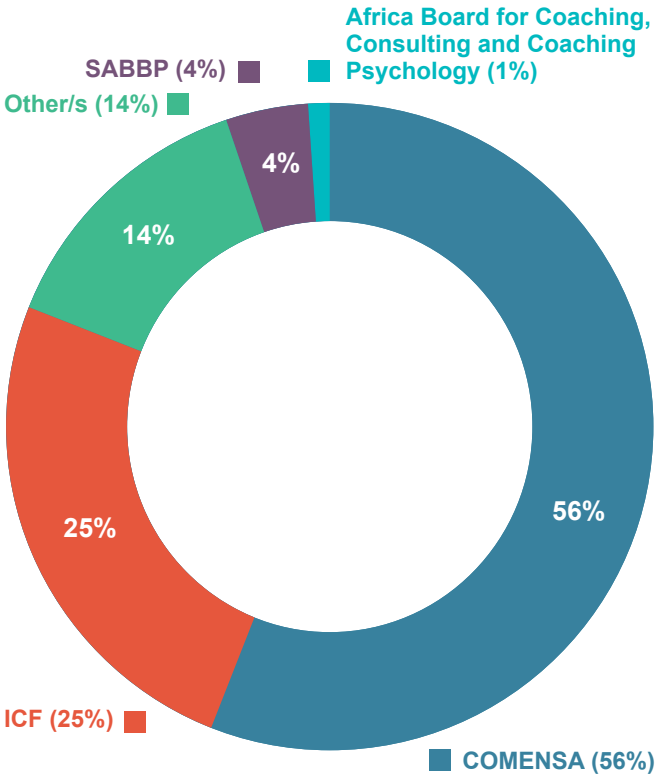


Figure 12: Membership of specific professional bodies

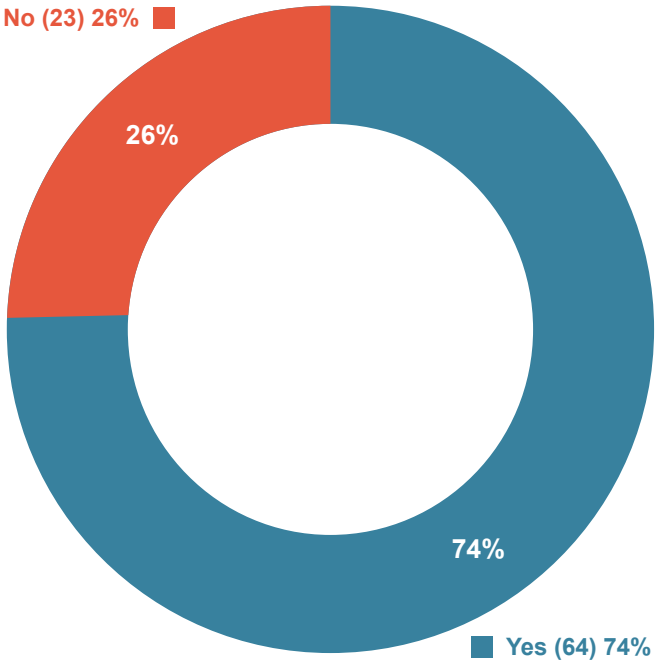


Figure 13: Supervision attendance

The partners in the research included two professional bodies – ICF and COMENSA – that sent the research link to their membership base, thus the results may be slightly skewed. We are unable to assess how many coaches are in the marketplace who are not members of professional bodies. Coach buyers need to be aware of the different professional bodies that exist and recognise that there is more than one professional body. There is also a difference in membership and accreditation. Accreditation provides an official recognition that the coach is able to coach at a particular level against a set of competencies. Each level also requires a set number of hours that the individual has coached.

Table 2 shows the data provided by ICF and COMENSA reflecting current membership and accreditation.

In the questionnaire, the respondents were asked whether they attend coaching supervision. The answers to this question are shown in Figure 13.

As membership of different professional bodies grows, supervision should increase. COMENSA expects all of its accredited coaches to agree to attend supervision to maintain their accreditation. Coaches can share this knowledge with their clients so that increasing awareness of supervision grows in the marketplace. The European Mentoring & Coaching Council (EMCC) has the same approach, while ICF currently does not prescribe supervision for accredited members.

The next question dealt with the frequency of this supervision. Find the participants' results in Figure 14.

	MEMBERS IN SOUTH AFRICA	REGISTERED MEMBERS	LEVEL 1 ACCREDITATION	LEVEL 2 ACCREDITATION	LEVEL 3 ACCREDITATION
COMENSA	943 + 242 student members	166	29 Credentialed Coach Practitioner (CCP)	13 Senior Credentialed Coach Practitioner (SCP)	22 Master Credentialed Coach Practitioner (MCP)
ICF	408	No level	38 ACC	127 PCC	12 Master Certified Coach (MCC)

Table 2: Current membership and accreditation
Sources: ICF (2019); M. Smith, COMENSA administrator (personal communication, September 23 2019)

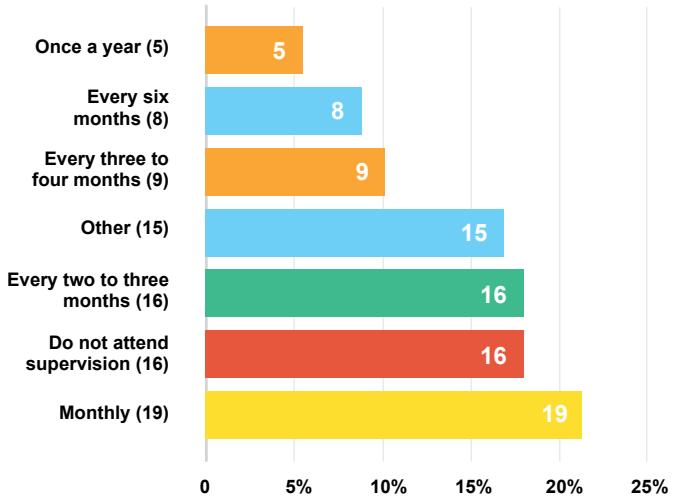


Figure 14: Frequency of supervision

There is no consistency in how frequent the supervision is, but we could expect this to change as professional bodies become clearer on their expectation. COMENSA members sign a code of ethics, which also includes an agreement to a specified number of supervision sessions.

In a large global study, containing 1 280 participants, conducted by McAnnally, and Hildebrandt, (2019), it was found that the uptake of supervision varied globally with only 20% of America using supervision, 38% of Asia Pacific using individual supervision, and 57% of Europe and Africa using individual supervision. This might be because COMENSA and EMCC make it compulsory for accredited members to have supervision, whereas ICF, which is more dominant in America, does not make supervision compulsory.

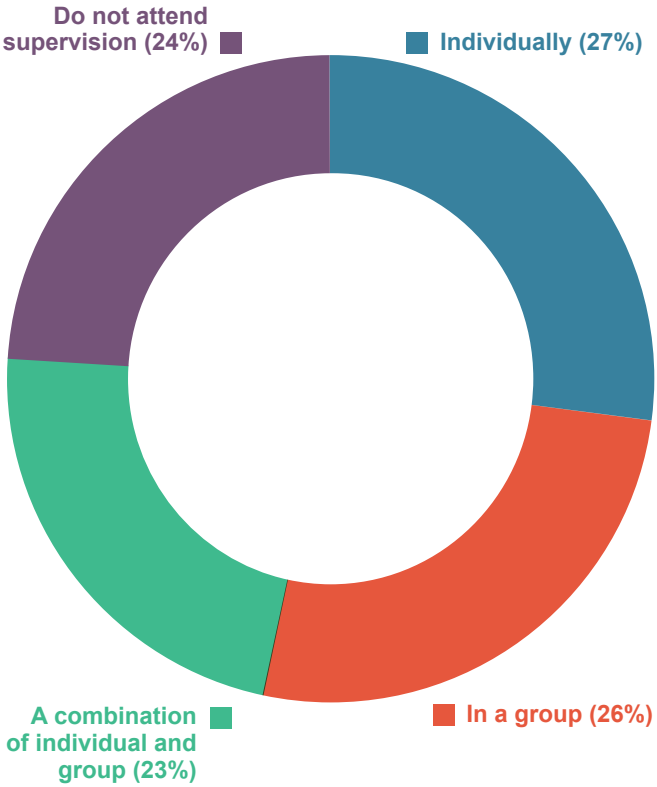


Figure 15: Group or individual coaching

The question was asked: "What was your role prior to coaching?" The replies are reflected in Figure 16.

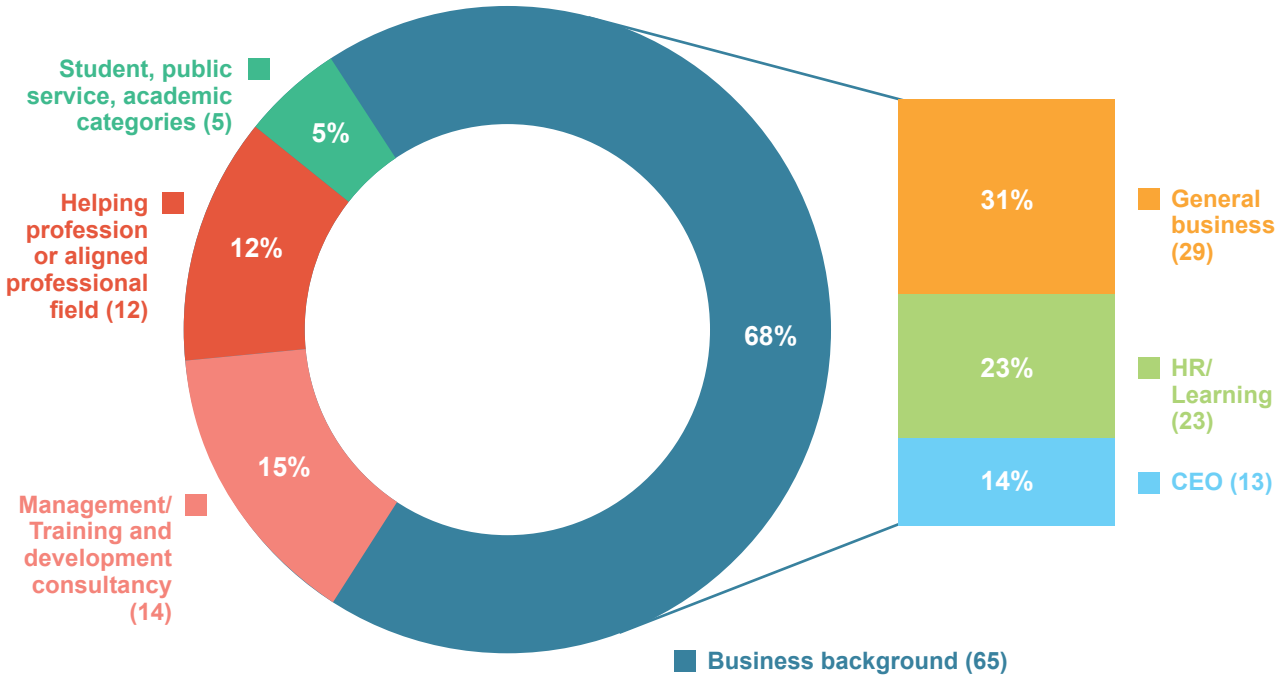


Figure 16: Role prior to coaching

The results in the pie chart reflect the percentages, while the key at the bottom of Figure 16 indicates the actual number of respondents. From the figure above, it can be seen that 65 respondents came from a business background, but this can be further broken down with 13 respondents having previously been managing directors or chief executive officers (CEOs) of companies. The nature of the business varied from heading a travel agency to a security company and a marketing organisation. A further 23 business respondents came from the human resources (HR) and learning and development or organisational development (OD) sections of the business. The remaining 29 respondents came from a variety of roles. There were 14 respondents from a management consultancy, training and development consultancy or aligned role, such as facilitationcompany; 12 respondents from the helping profession or aligned professional field, including teachers, psychologists, occupational therapists and counsellors; and five respondents who represented the "Other" field, such as student, public service and academic categories.

Rates coaches charge for different components of coaching

The following question was asked: "Please list the range of rates that you charge for your coaching services. If different rates for different coaching options, please elaborate. Example:
Executive 1-1 coaching (rate xxxx)
Team coaching (rate xxx)
Junior management (rate xxxx)"

The question was deliberately made open-ended, as there is no research listing coaches' rates. The feedback below is detailed and not only shows the rates, but also how coaches break these down. The rates given are per hour. Thereafter, the data was analysed based on how the coaches categorised their findings – the categories have been stated by the coaches and were not in the questionnaire design.

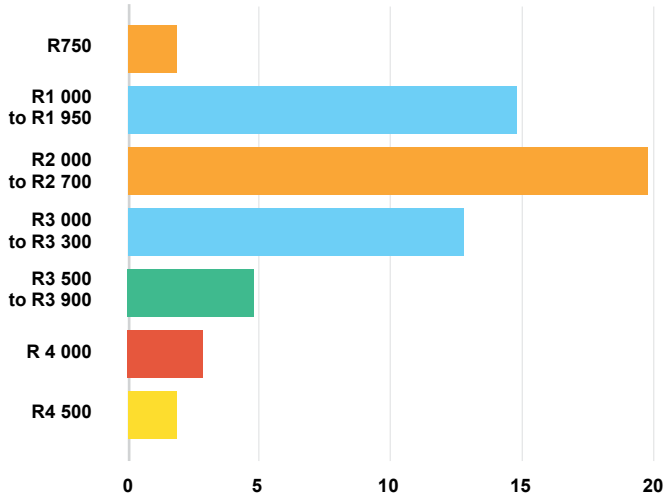


Figure 17: Executive coaching rates

Summary of key findings regarding rates

- **In executive coaching, the range of fees is still large, with 79% of the coaches charging between R1 000 and R3 300, and the average rate being R2 500.**
- **In private coaching, 89% of coaches charge between R500 and R1 500, with the average rate being approximately R950.**
- **In life coaching, 75% charge between R450 and R850, with the average rate being R770.**
- **In group coaching, 60% charge between R2 200 and R5 000, with the average rate being R4 650, but the median rate is R2 950. There were a few coaches who charge a significantly higher rate. Interestingly, two coaches charge per participant in a group – one charges R150 to R250 per participant; and the other charges R2 400 per participant. This "per participant" charge was less common.**
- **In team coaching, 53% of coaches charge R2 400 to R4 000 per hour, although seven coaches charge a per day rate, with a median of R15 000 per day. One coach charges R30 000 to R40 000 per day.**
- **In middle management coaching, 62% charge between R650 and R1 600; the average rate is R1 800.**
- **In junior management coaching, 43% charge between R1 000 and R1 750; the average is R1 500.**
- **Specialised coaching, as listed in Figure 17.7 had specialised rates unique to the offering – e.g., coaching students, entrepreneurs.**
- **There are newly qualified coaches who are not charging and are doing pro bono coaching, and internal coaches also do not charge clients. Four people were not comfortable sharing their rates.**

Please note that the rates are listed by the actual number of coaches and not in percentages, due to the breakdown per category. This makes it easier to assess the exact number of respondents who defined themselves by that category/label and rate.

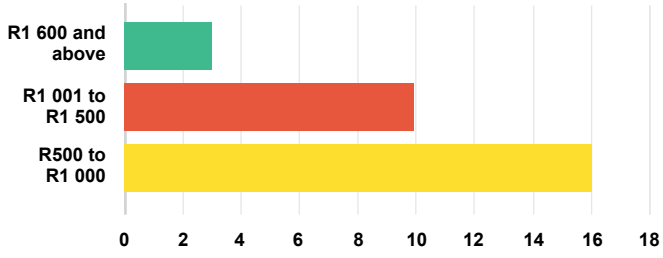


Figure 17.1: Private coaching rates

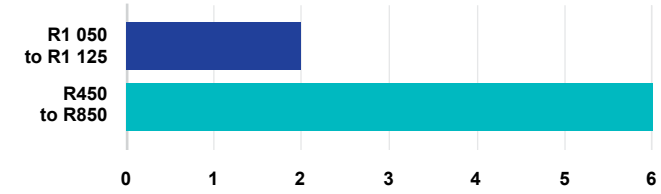


Figure 17.2: Life coaching rates

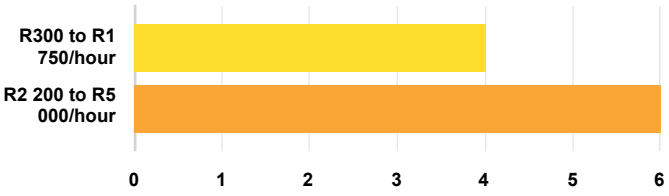


Figure 17.3: Group coaching rates

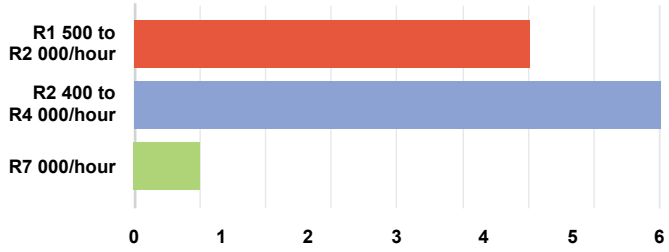


Figure 17.4: Team coaching rates

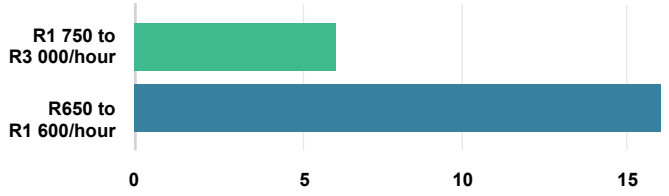


Figure 17.5: Middle management coaching rates

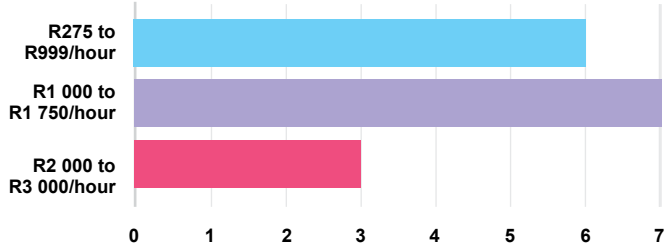


Figure 17.6: Junior management coaching rates

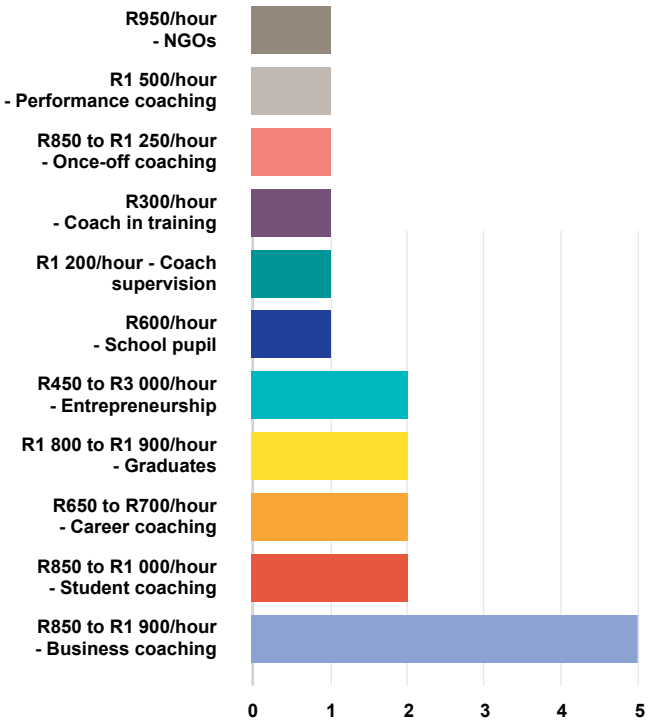


Figure 17.7: Miscellaneous rates per category

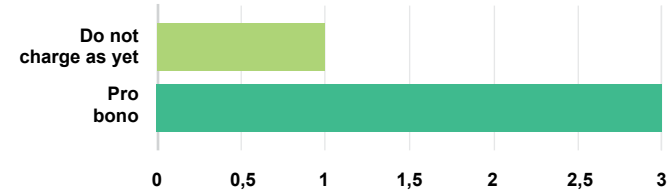


Figure 17.8: Not charging yet/Pro bono

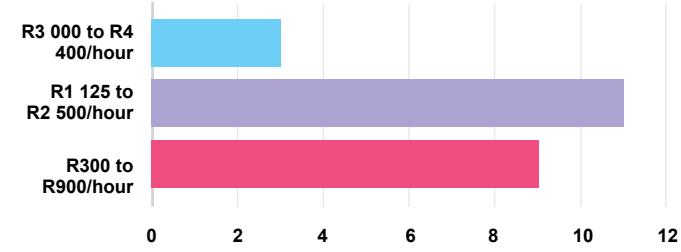


Figure 17.9: Rates – unspecified per group

4. Biographical information of coachees/coaching participants

Having understood who the coaches are, we explore who the coachees are. This data will be supplemented with data obtained directly from the coachee survey and consolidated in the integrated summary. We summarise the findings first and then look at each component.

Overview and summary of findings of biographical data of coachees

The primary participants who engage in coaching are four groupings:

- **Senior management/Exco members – 17%**
- **People in transition – 14%**
- **People identified with high potential – 14%**
- **Middle management – 13%**

This provides a range of answers from the organisation, which indicates that coaching is becoming embedded as a learning modality across all levels.

Based on this survey, 33% of black people are receiving coaching, followed by 29% white, 13% coloured and 7% Asian. This is not aligned with South Africa's racial composition. The racial composition of coaches is also different to the composition of the people being coached. The 2011 census gave the population in South Africa as follows:

- **African – 79.2%**
- **White – 8.9%**
- **Coloured – 8.9%**
- **Indian/Asian – 2.5%**
- **Other – 0.5%**

A further profile factor of the coachees is that 67% are aged between 31 and 50.

The respondents were asked, "Who are the primary participants in your coaching? Please split into percentage. Please note percentages should add up to 100%." See Figure 18 for the different categories and percentages.

The range of who is receiving coaching is wide and demonstrates that coaching is becoming embedded at all levels within an organisation.

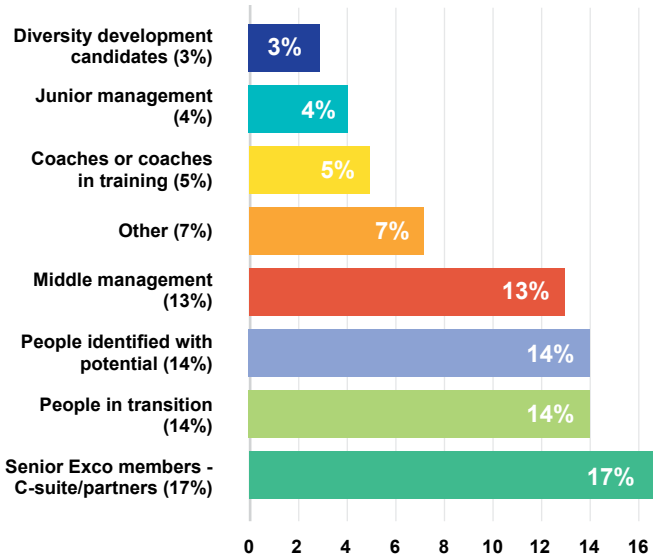


Figure 18: Primary participants in coaching

The question was asked: "What is the racial composition of the people being coached by respondents of this survey? Please split into percentages. Please note percentages should add up to 100%." See Figure 19.

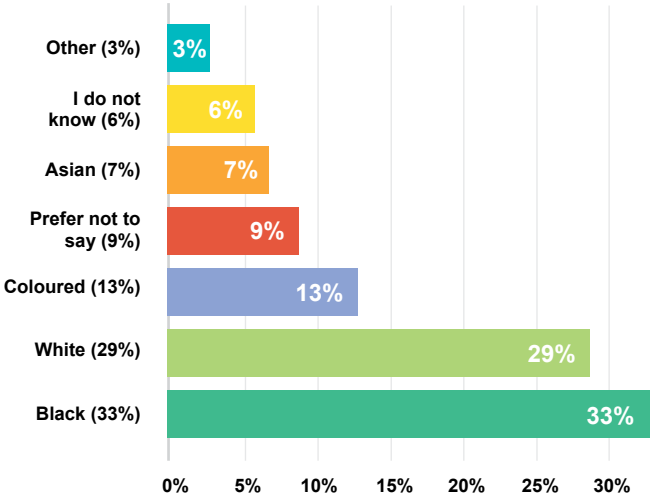


Figure 19: Racial composition of the people being coached by respondents of this survey

From this survey, it was established that 33% of coachees are black, 29% are white, 13% are coloured, and 7% are Asian. Furthermore, 6% were unknown, while 9% of coaches preferred not to share this information. This is not aligned with South Africa's racial composition. The racial composition of coaches is also different to the composition of the people being coached.

The 2011 census gave the population in South Africa as follows:

- **African – 79.2%**
- **White – 8.9%**
- **Coloured – 8.9%**
- **Indian/Asian – 2.5%**
- **Other – 0.5%**

	African	White	Coloured	Indian/ Asian	Other
SA census 2011	79.2%	8.9%	8.9%	2.5%	0.5%
Coachees	33%	29%	13%	7%	15% not stated
Coaches	16%	71%	7%	6%	

Table 3: Racial statistics of coachees and coaches against census

In the survey, the following question was asked: "What is the average age range of the people being coached by respondents of this survey? Please split into percentages. Percentages should add up to 100%." The answers are presented in Figure 20 below.

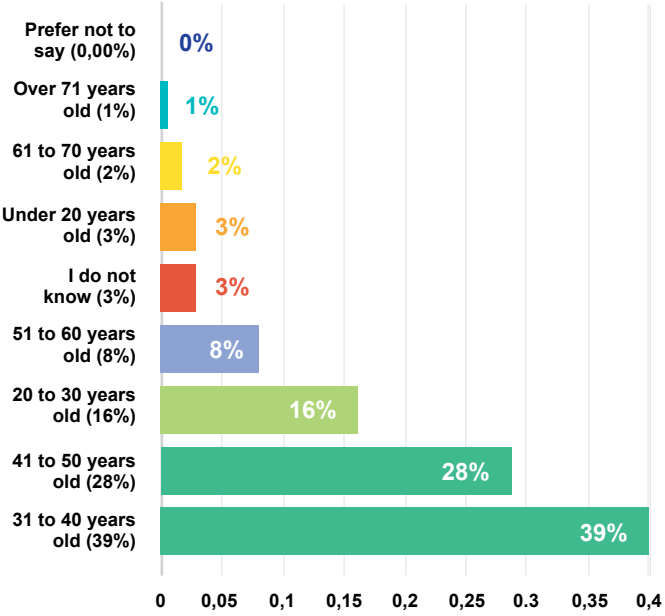


Figure 20: Age range of coachees being coached by respondents of this survey

Buyers of coaching could use the data above to compare the demographics to their own organisation and the age of their workforce. A further profile factor of those being coached is that 67% are aged between 31 and 50.

5. Coaching practice – About the process

This section focuses on the process here and looks at the following components:

- How do coaches market their coaching services?
- How are coachees and coaches matched?
- Why are people being coached from the coach's perspective?
- What methodologies are coaches using?
- Do coaches use coaching reports?
- Do coaches use assessments?

Do coaches have triads sessions – e.g., bringing in a manager into a coaching session?

An overview of the findings is first provided, followed by a detailed account.

Summary and overview of the findings of the coaching process

Coaches primarily market themselves through word of mouth and social media. Some coaches are very specific and only use a particular form of social media, with 12 coaches using LinkedIn, while Twitter and Facebook were used less frequently for marketing purposes.

Matching the coach and coachee was a very conscious process that was evenly weighted with 43 coaches getting matched, 44 not getting matched and 10 coaches being unsure.

From the coaches' experience and perspective, the two prime reasons why people want coaching are personal development (27%) and transition coaching (26%) to support career development. Leadership development was listed as the third reason (15%).

In choosing methodologies, South African coaches are eclectic and draw on a wide range of coach methodologies.

In terms of giving feedback to the clients through reports, 42% of coaches use reports regularly, 3% say it varies, and 20% do not use reports. It seems that reports are used primarily if the client demands or expects it.

The use of assessments and triad sessions is variable and not a consistent factor. Coaches who use these interventions utilise them occasionally and not regularly.

The time span of sessions is personalised and variable with 33% of coaches, but 34% of coaches coach over a six-month period.

48% had sessions of one hour and 32% had sessions of 90 minutes. The balance were mixed durations. Some comments indicated that frequently executives and senior management had 90 minute sessions and middle and junior management had one hour sessions..

86% of group sessions were 90 minutes to two hours in duration.

The number of sessions varied considerably and were very personalised from three sessions to 12 sessions.

Coaching impact was measure primarily through three ways 1) Self – reporting (39%),2) Measuring against goals and 3) Pre and Post Reporting through assessments (28%)

The importance of contracting as a means to manage confidentiality came through from 89% of the respondents, although only 57% are using written contracts.

There was no one dominant obstacle to coaching as seen by the graph below.

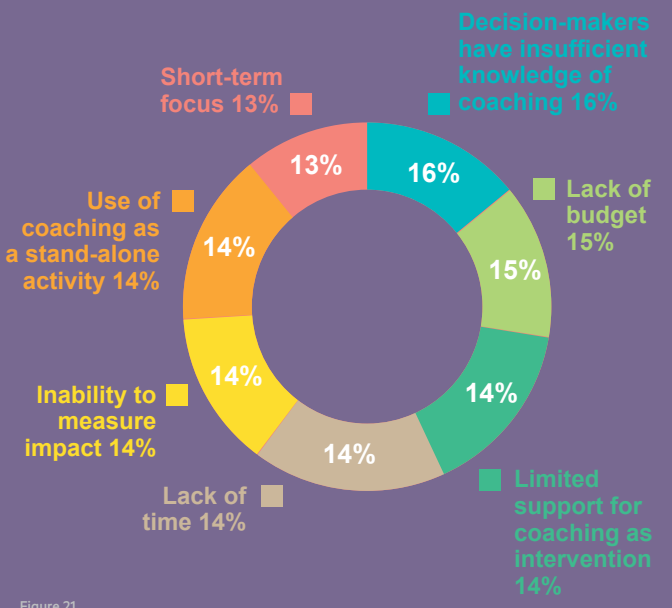


Figure 21

Two major trends were commented on

38% of respondents believe coaching will continue to grow. It may change according to a few comments e.g. more internal coaching or group coaching but it would continue to grow.

Technology was seen as key trend and the comments relating technology varied, as some coaches saw it as very positive and others as negative. There is not as much agreement about technology's impact as there was agreement about coaching usage increasing. Many recognised that technology would have an impact and how coaches and the coaching industry respond will determine if this is positive or negative.

One of the questions in the survey asked how the respondents secure the majority of their coaching work. Their replies are captured in Figure 21.

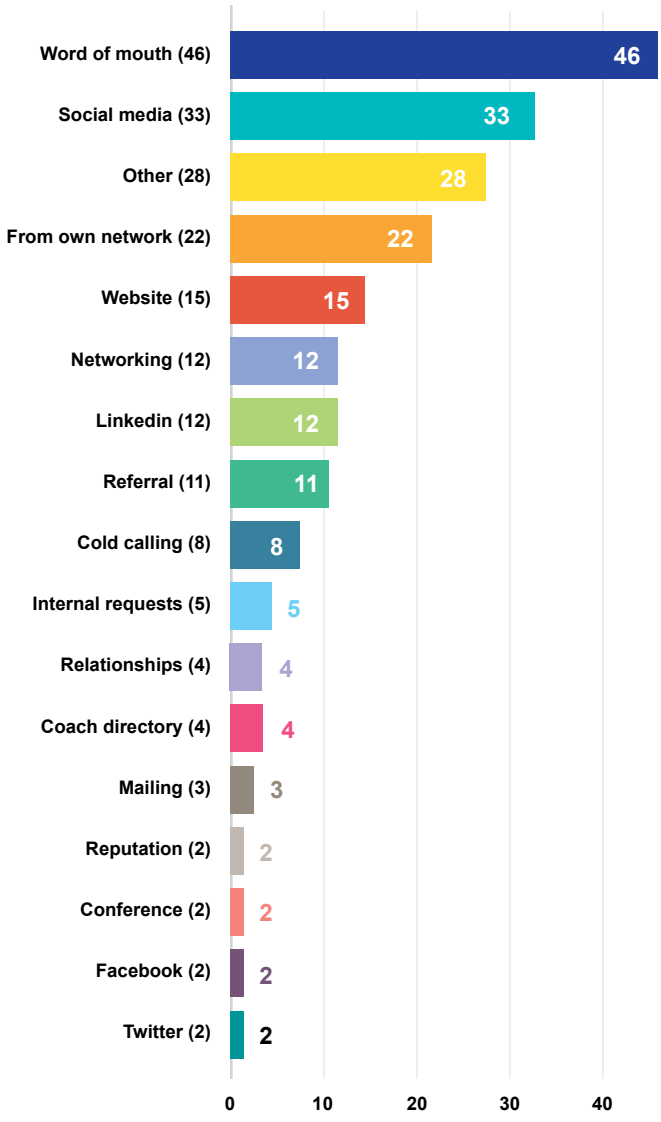


Figure 21: Source of coaching work

Figure 21 reflects individual choices, bearing in mind that there may be more than one source per individual, thus not percentages. It highlights that relationship marketing remains the prime source of marketing, but that social media is becoming increasingly more important. People could select several options for this question and some preferred LinkedIn to Twitter, while others labelled all social media together.

The following question was regarding the coach to coachee matching process and whether the participants of the survey apply this. See Figure 22 for the answers.

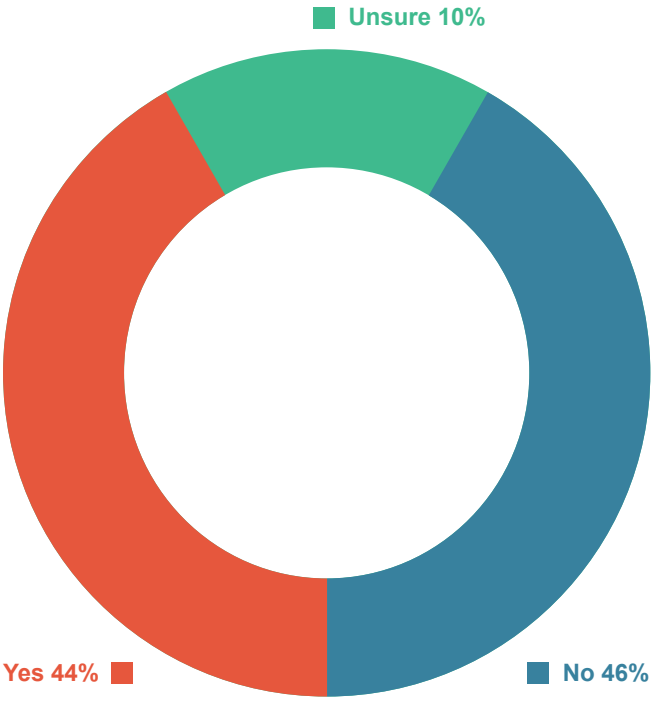


Figure 22: Matching coach to coachee process

Matching is a process used to specifically match a coach with a coachee. It is not a random assignment of coach to coachees or only providing one coach to a coachee. This was fairly equally divided among those who go through a coach matching process and those who do not. The reason for not matching is sometimes very practical, such as location of coach or coaches coaching on a leadership programme and being allocated to groups of individuals or being the only coach in the company.

By encouraging managers to select their coach, the engagement with the coaching process starts prior to the first meeting. The future coachee begins to think about what he/she would like to achieve from coaching, what is important and what kind of person would help them, thus the selection process becomes part of the coaching journey.

The 56% of coaches who went through coach matching used chemistry sessions in which the coach and coachee would meet prior to coaching. The aim of a chemistry session would be to see if there is a "fit" between the coach and potential coachee. Do they have chemistry/connect/resonate with one another in terms of values, approach and personality? Often in setting up chemistry sessions, the coachee will meet three to four coaches and then select one.

While chemistry sessions have some advantages, meeting three or four coaches prior to coaching commencing almost always results in some coachee fatigue. The manager/coachee keeps sharing what he/she wants from coaching, instead of actually beginning the coaching. A recommended approach is that the potential coachee completes a coaching expectation handout with has some key questions about issues to be addressed in coaching, preferences in terms of race, gender, age and language are surfaced. HR or an external coach management company can read this and send through résumés of coaches. Each of the résumés could be in the same template and filled in by the coach. The résumés would include factors like the coaches' background, their methodology as well as some appropriate personal details – e.g., mother of three children, health- and fitness-focused, loves jazz. The future coachee chooses the résumé and meets with the coach. There is a backup plan, where if upon meeting the coachee feels this is not the right coach, he/she can meet a second coach. This can prevent coachee expectation fatigue.

In Figure 23, the answers to the following question are reflected: "From your (coach) perspective, what was the key reason you were asked to do a coaching as an intervention?"

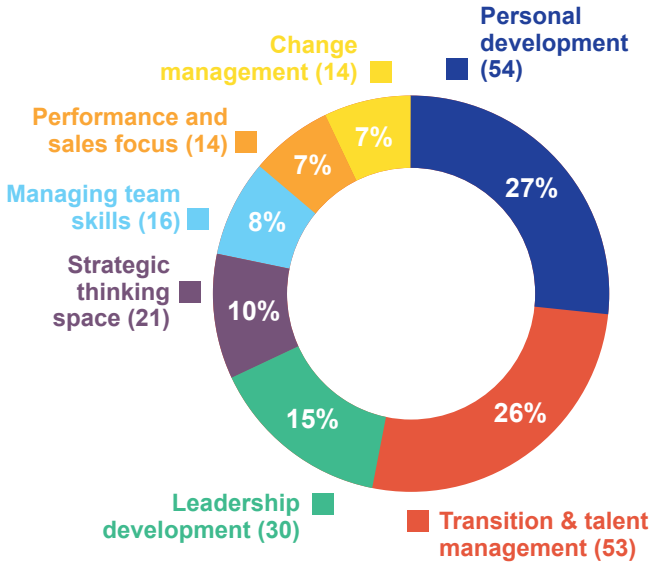


Figure 23: Coach's perspective on reasons for coaching

In response to the question above, many participants listed more than one reason for coaching interventions. The percentages represent how many times in total this was mentioned. A typical response would have multiple parts, such as in the two examples below:

- **To help leaders in lower and middle management positions gain confidence in their roles, gain skill in problem-solving and identifying actions that include leading upwards. Leadership development for individuals in middle management positions. Emotional intelligence – helping leaders gain insight into complexities of leadership – in the workplace and in their communities. To strengthen partnership within teams.**
- **Organisational development. Talent management. Coaching managers into higher job band – transition. Management development for managers and senior managers. Strategic thinking space for executives and business owners. Helping where they are "stuck". Conflict with other staff or managers and coaching around specific outcomes.**

Personal development included emotional intelligence. Considering Daniel Goleman's view that emotional intelligence has four components – self-awareness, self-management, social awareness (awareness of others), and relationship management – most of the personal development described by respondents focused on these areas. It would cover the bulk of personal development with increased self-awareness and relationship management development being two of the most widely focused coaching interventions.

	Self: Personal competence	Other: Social competence
Recognition	Self-awareness ☑ Emotional self-awareness ☑ Accurate self-awareness ☑ Self-confidence	Social awareness ☑ Empathy ☑ Service orientation ☑ Organisational awareness
Regulation	Self-management ☑ Self-control ☑ Trustworthiness ☑ Conscientiousness ☑ Adaptability ☑ Achievement drive ☑ Initiative	Relationship management ☑ Developing others ☑ Influence ☑ Communication ☑ Conflict management ☑ Leadership ☑ Change catalyst ☑ Building bonds ☑ Teamwork and collaboration

Table 4: Emotional intelligence framework
Adapted from: Cherniss and Goleman (2001)

The other main reason for using coaching is to help people through transitions. This can vary from helping a new CEO transition into that role and managers becoming EXCO members to someone receiving their first promotion into management. It is recognised that transitions bring challenges and providing a reflective space for the individual will facilitate a better transition. Sometimes the coaching is made available in anticipation of a transition/promotion and is seen to be supporting talent management and career management.

While personal development and talent development can be an integral part of leadership development, some coaching is focused very specifically on the leadership development, such as supporting delegates on a leadership programme. The holding of a strategic reflective space took place more with executives.

There may be some difference in emphasis of the reason, but the actual process may be very similar – e.g., in developing a leader, coaching may focus on conflict management, which is part of emotional intelligence. In allowing executives to have strategic thinking skills, it may be necessary to get them to question their assumptions, which is heightening self-awareness.

The respondents of the survey were asked: "What methodologies, tools and techniques do you use? There are no preferred methodologies, tools or techniques, but we would like to know which methodologies, tools and techniques coaches are using. Please list a comprehensive range (e.g., neuroscience – SCARF method, transactional analysis-victim triangle, narrative coaching – reframing etc.). For the purpose of this question, we have defined methodology as the overarching framework and tools and techniques as specific practical actions that can be applied."

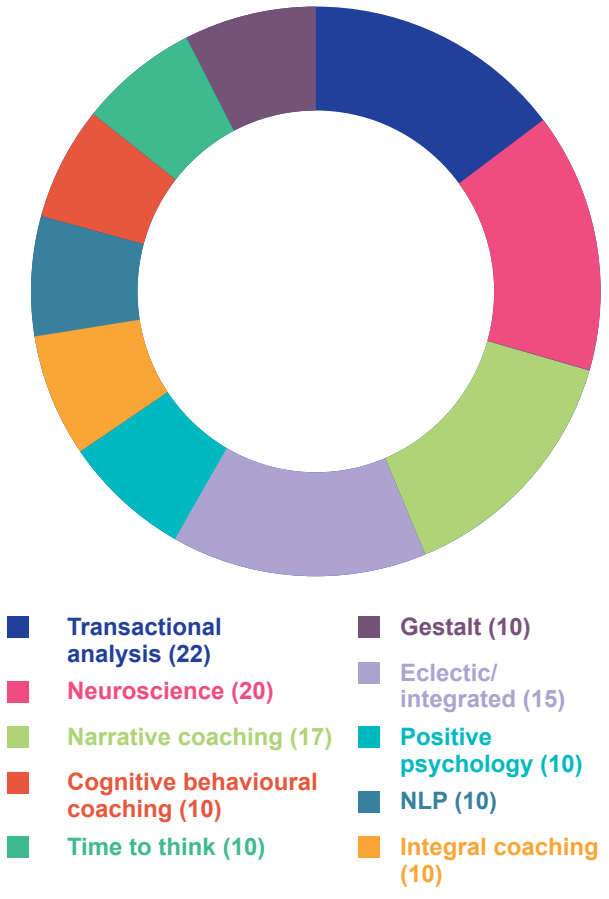


Figure 24: Methodologies, tools and techniques

This question appears to have been leading as the examples that were shared in the asking of the questions were quoted more frequently, such as SCARF. People tended to list several approaches, as can be seen in the two quotes below:

Narrative coaching; gestalt coaching; where possible and if useful, might offer neuroscience tools, such as SCARF. I try not to be either technique-driven, but rather to encounter the person as a unique person, where we are working in whatever way will be most useful in my opinion. I am intrigued by identity and meaning, so I am more interested in who the person is, how they make sense of the world, rather than imposing any structures on them.

I have built an array of methodologies and a toolkit from my training experiences. In my conversations, I select resources as the need for them arises. My conversations are not driven by a particular model.

The majority of respondents would list several models and techniques. The following example shows a typical response in terms of the range of answers though the options could be different, several options would always be listed: "SCARF, transactional analysis, NBI brain preference, conversational intelligence, consistent high performance, positive psychology, value driven, situational leadership, executive presence."

The tools, techniques and specific methods that were mentioned more than 10 times were GROW (19) and SCARF (12). The array of tools, techniques and methods varies and included gestalt resistances, drama triangle, immunity to change tools, conversational intelligence tools, journaling, enneagram of age, strengths finder, leadership tools, values exercises, learning styles, contracting, Socratic approach, and use of linguistics. The list had over 100 different techniques.

The analysis looked at dominant replies and below is what was noted, bearing in mind that respondents may have listed several approaches. The ones listed were extracted to see if there is any dominant methodology in South Africa. All responses with more than 10 people listing it are listed below.

- **Transactional analysis (22)**
- **Neuroscience (20)**
- **Narrative coaching (17)**
- **Eclectic/Integrated (15)**
- **Positive psychology (10)**
- **Integral coaching (10)**
- **NLP (10)**
- **Cognitive behavioural coaching (10)**
- **Time to think (10)**
- **Gestalt (10)**

Other methodologies included consciousness coaching, ontological coaching, existentialism, person-centred humanistic approaches, systemic methodologies, and solutions-focused work.

The conclusion is that South African coaches embrace a range of methodologies, tools and techniques. It appears that coaching is very much client-centred and methodologies are used to support the coaching need. Most coaching is seemingly not methodology-driven. It would be useful to potentially increase the sensitivity and discernment of coaches as to what influences the use of which tools and approaches and when they are used. This study did not look at which methodologies are used for which reasons, but it would be worth exploring this in future surveys.

The next question in the survey asked respondents whether they use coaching reports. For their replies, see Figure 25; with Figure 26 showing the reason for using these reports.

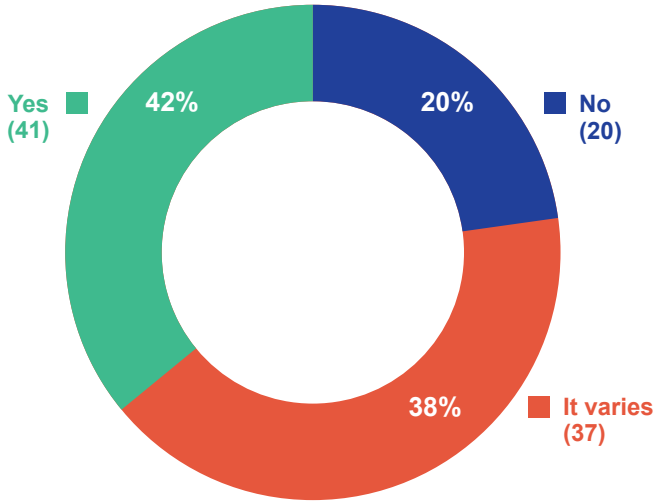


Figure 25: Coaching reports

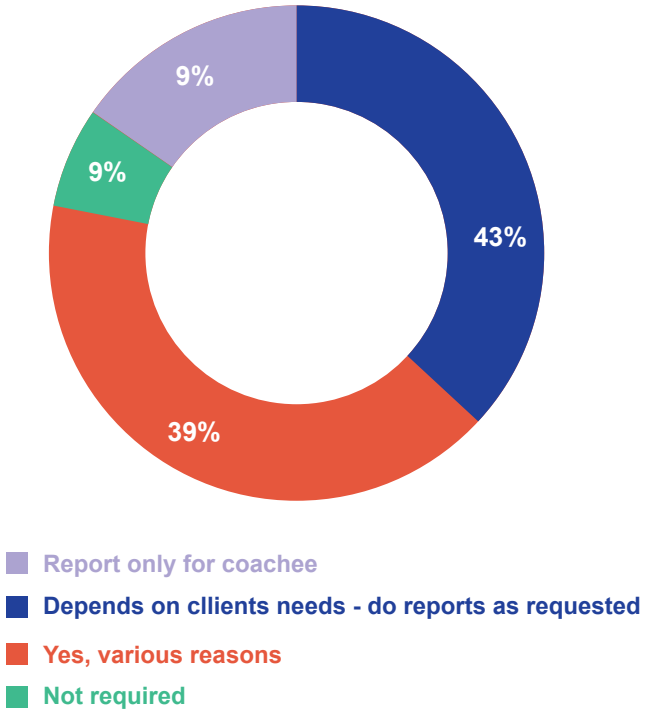


Figure 26: Use of reports

Reports are not used in a consistent way and the value of their use seems to be linked to client request. Coaches are not necessarily driving whether reports are a value-add or not. Additionally, the respondents were asked whether they incorporate assessments into their coaching process. The figure below depicts their replies.

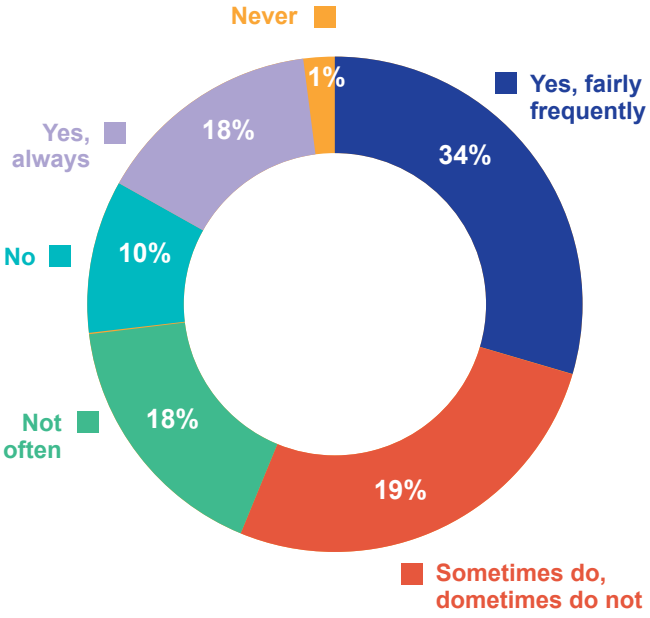


Figure 27: Use of assessments

The use of assessments is an inconsistent practice. It may be linked to the preference of the coach or the client organisation.

The next question in the survey was: "Do the organisations you coach supplement individual coaching with other options, such as feedback processes, triad coaching or other processes?" (see Figure 28).

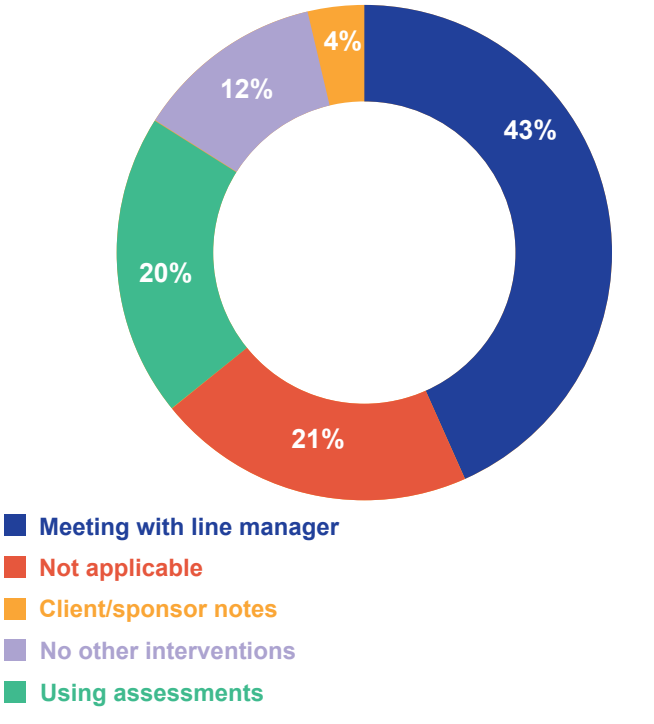


Figure 28: Supplementing Individual coaching

Although triad meetings (a three-way meeting between coach, coachee and line manager) are used as are assessments, the fact that they are not used consistently in all situations suggests that these are not embedded practices. The benefits of these supplementary practices need to be established. One benefit would be systemic and impact on organisational factors and understanding context, which might be a shift from coaching individuals to coaching the system and the organisation.

The question was asked: "What is the average number of sessions/ period you contract coaches for coaching? E.g., six sessions over six months; six sessions every two months? Please list variations – e.g., for managers we do 'x' and for executives we do 'y'." The respondents' answers are in Figure 29.

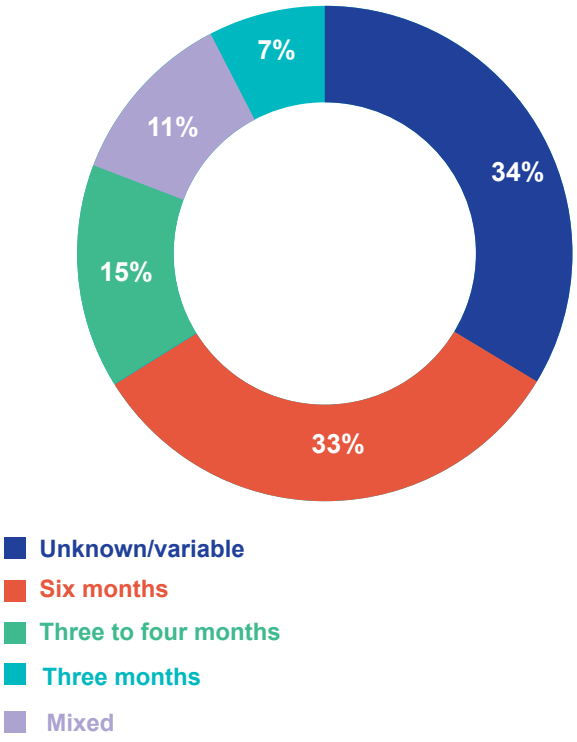


Figure 29: Average time span of sessions

The responses were mixed, with one person saying one month, another person saying two months, another nine months, and another 18 months, but these were only individual responses. This fits with the personalised nature of coaching.

It might be useful to start selling hours as opposed to sessions and even personalise this more to the individuals' needs – e.g., purchasing 15 hours of coaching for a manager, which will be offered over a six- to 12-month period. This allows the individual to commit to coaching at the right time. If an individual is under intense pressure and stress at work, it may not be appropriate to start as they commence with a go-live IT project. He/she could delay starting until after the go-live date. Alternatively, someone may be having monthly sessions and experience a crisis at work and require intense coaching on a weekly basis for three weeks. If coaching is truly a personalised solution, then personalised timing options could also be the solution. This requires less rigidity from corporates and also flexibility from coaches. This would not work in all circumstances (e.g., support of leadership programmes), but where it is possible, it could be a future way of negotiating coaching contracts. Another option might be to have an outcome-based approach, where the coach is paid to achieve an objective with a client.

In terms of client readiness for coaching, an important variable was the timing of the coaching. By allowing some flexibility with timing, companies may get a better return on their investment.

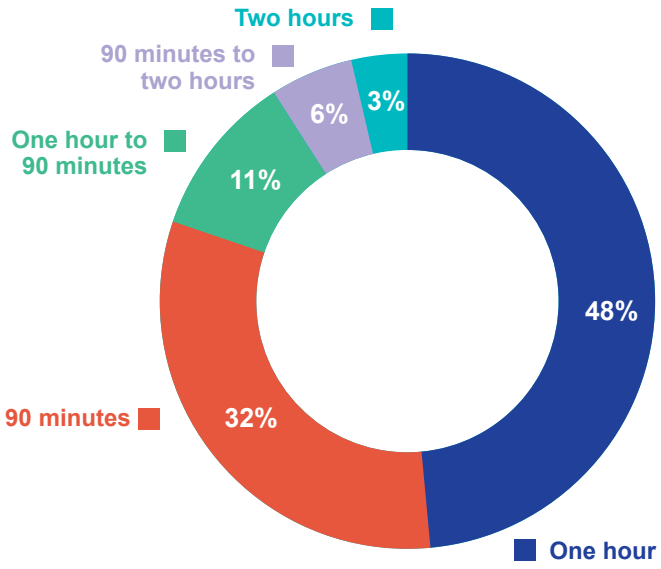


Figure 30: Average duration of a coaching session

Figure 30 shows the average length of a coaching session. Comments highlighted that most frequently executives and senior management had 90-minute sessions, and middle and junior management had one-hour sessions. Figure 31 shows the average length of a group coaching session.

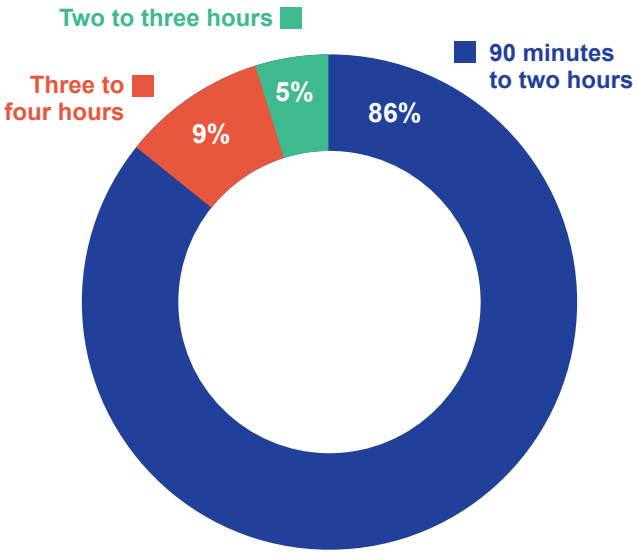


Figure 31: Average duration of a group session

The respondents were asked: "What is the average number of sessions/periods you contract coaches for coaching?" The answers are reflected in the figure below.

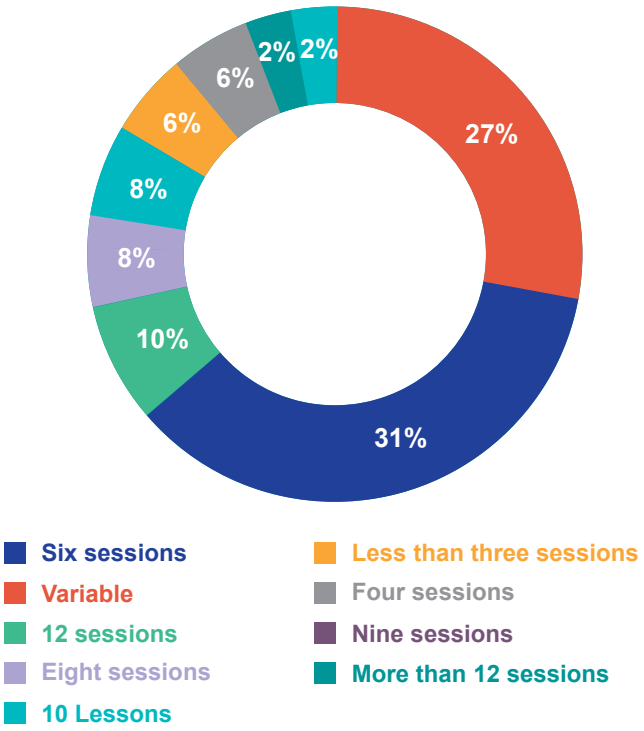


Figure 32: Average number of sessions

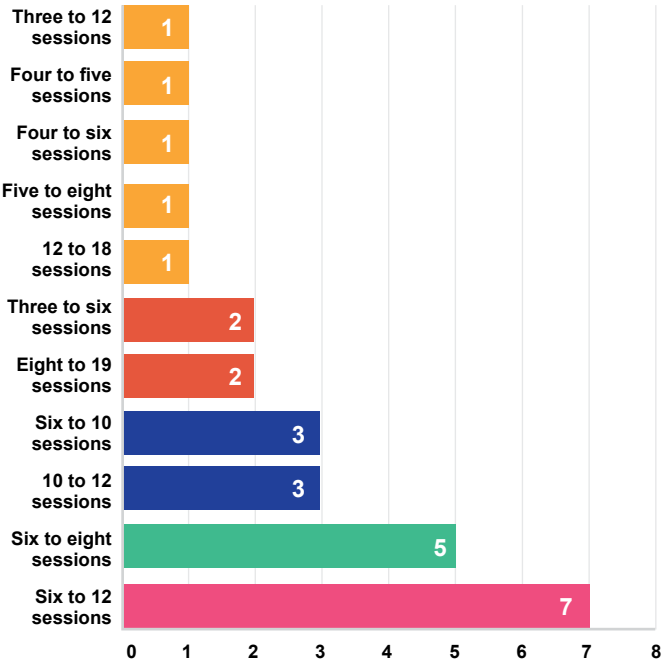


Figure 32.1: Range of variable sessions

Figure 32.1 shows how varied coaching is and how it is packaged differently for each group. Clients often ask what is the norm and we see that it can vary depending on the coach.

In Figure 33, the responses to the following question are portrayed: "How do you measure the benefits of coaching? Please share qualitative and quantitative methods of measuring coaching impact?"

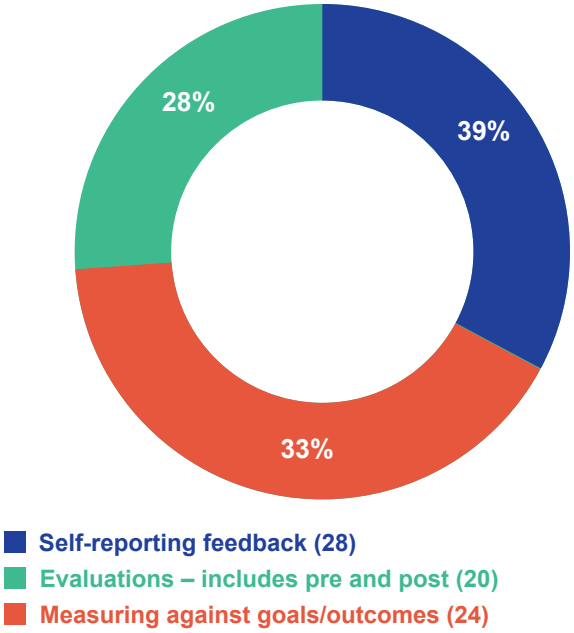


Figure 33: Measuring impact of coaching

Most of the feedback is self-reporting, even if it is a written evaluation or an evaluation against goals.

This is an area that can be expanded on in further research.

In the survey, the respondents were also asked how they manage confidentiality within the coaching process (see Figure 34).

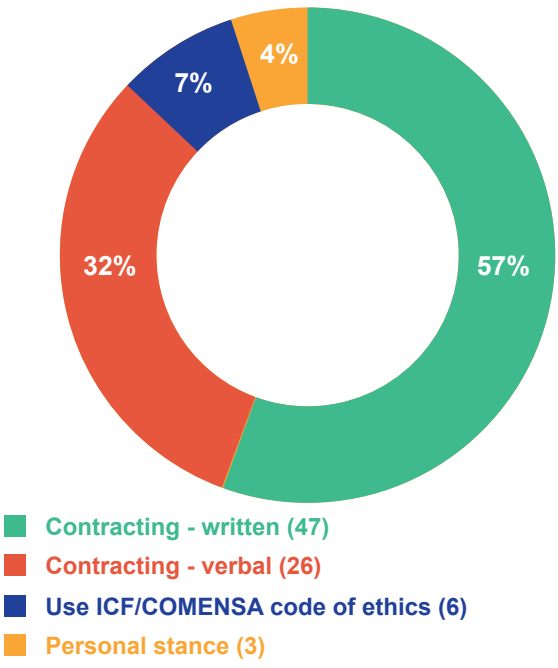


Figure 34: Managing confidentiality issues within the coaching process

The importance of contracting came through from 89% of the respondents, although only 57% are using written contracts. It would be recommended that as coaching grows, more coaches use written contracts with the multiple stakeholders – e.g., coachee and the organisation.

Figure 35 below shows the respondents' replies to: "What are the biggest obstacles/challenges/impediments to using coaching within the organisation in which you coach?"

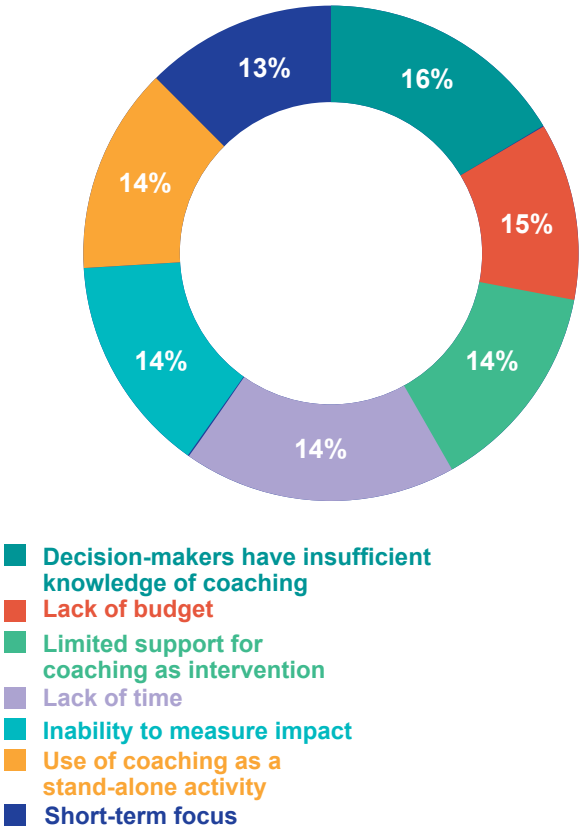


Figure 35: Obstacles to coaching

The next graph, in Figure 36, illustrates the participants' answers to the following question: "What trends do you think will have an impact on coaching in the next five years? Do you think the trend will be positive or negative – briefly describe your reasons for this belief."

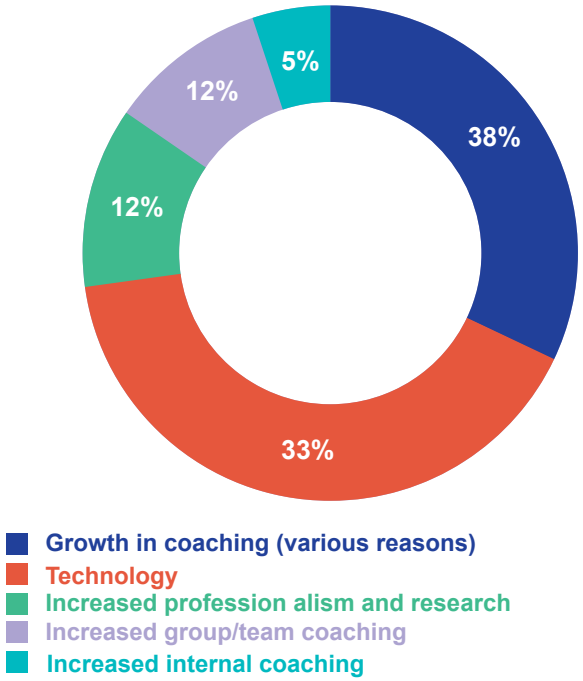


Figure 36: Trends on coaching

More respondents believe that the use of coaching is going to grow than not grow. The reasons for this vary, with the most common being that coaching has a positive impact and companies will begin to recognise that they are getting a return on investment and increase the use of coaching.

Some comments that support this position include:

- **"It will continue to grow as a value adding way to help people and organisations."**
- **"The more positive results employers experience, the more money they will invest in coaches."**
- **"I think there will be a great and positive change as more people get to understand the offer of support, compassion and ubuntu from coaching in an ever-changing, fast-tracked, complex 21st century environment."**

There is also a link between increasing the professionalisation of coaching and coaching growing in usage. One respondent pointed out:

- **"I think coaching is gaining mainstream acceptance. I think as companies become more informed and coaches more professionalised, the use of coaching will gain in popularity. I believe that there is likely to be a greater alignment between coaching service and strategic plans of organisations."**

Another common reason stated for growth is the context in which coaching is happening. Some examples of context having an impact include generations X, Y, Z maturing; increase in work pressure; the impact of the 4IR; and the stressful working environment. Examples of comments include:

- **"The changing face of the workplace, which requires more agility, plus the hectic pace of change and stress levels experienced by leaders – a required focus on mental health … all this means coaching will grow to help leaders be more resilient."**
- **"The Fourth Industrial Revolution will necessitate the rethink of the world of work."**
- **"The need for more relationship and relational skills in organisations will increase as digital and virtual aspects increase and this is good for coaching. And I think coaching will need to work faster and deeper, with high impact quickly, to keep pace with the need, especially with millennials who are relational and want immediate gratification. This opportunity is positive, but means coaching skills will need to adapt."**

Technology was seen as key trend and the comments relating technology varied, so some coaches saw it as very positive and others as negative. There is not as much agreement about technology's impact as there was agreement about coaching usage increasing. Many recognised that technology would have an impact and how coaches and the coaching industry respond will determine if this is positive or negative. An example of this is that online coaching applications are being developed and these could be a threat or an opportunity for the coaching industry. A real example to demonstrate this is the use of an app to identify cyberbullying on Facebook; and then to respond to that with text that draws the individual into a WhatsApp conversation and then potentially into a coaching conversation or a counselling conversation. Coaches and psychologists will oversee the WhatsApp conversations and supervise the younger generation as they respond via text. This is a changing role for coaches. We can debate the ethics and benefits and pitfalls of this approach, but the reality is that technology is here to stay. Artificial intelligence may threaten person-to-person coaching.

Benefits of technology include working from home, coaching globally and using virtual coaching. Currently, while virtual coaching takes place individually (17%), less than 1% of team and group coaching takes place virtually. Using technology would also make coaching more scalable. The other impact of technology is that, as people use technology, they may become more disconnected from themselves and be less able to communicate effectively and deal with conflict. The paradox is that coaching using technology might address this issue.

Apart from the increase in coaching usage and the impact of technology, two other trends were noted: professionalisation of coaching; and an increase in group coaching.

Coaches had mixed feelings about professionalisation, as seen in the two contrasting statements from respondents:

- **"Professionalisation of the profession will shake out non-professional coaches and will lead to a greater degree of consistency in the provision of professional coaching services. This will, in turn, lead to greater confidence in the market and greater credibility for the services we offer, which in turn will lead to more consistent rates that coaches can charge."**
- **"I think overregulating the industry will have a negative impact on service."**

The tendency was more in favour of regulation in terms of the need to maintain high ethical standards and rid the industry of cowboys. Some people commented about the increased research into coaching and the options of choices of postgraduate diplomas and master's and PhDs in coaching, and how this is indirectly linked to professionalisation of coaching.

A few people commented on the growth of internal coaches, which is definitely a trend to watch. Awareness of this trend was not high from the existing internal coaches who completed the survey, nor from external business coaches.

Extra comments

The participants were asked an open-ended question: "In completing this survey, has it triggered any thoughts that you believe would be valuable for us to know about coaching? Please feel free to add any comments." Three areas were commented on:

- **A need for community;**
- **Governance of coaching – regulation and ethics; and**
- **Societal trends impacting on the future of coaching.**

Coaches commented on how they were feeling isolated and wanted to belong to some community. One coach stated, "I just appreciated the opportunity to share, would be wonderful to do more of this as a group of coaches." Another coach said, "I would greatly appreciate more support and connection to coaching forums to help find a way to a more sustainable practice." This need for community might be a parallel need that coachees are experiencing as well as buyers of coaching.

Some coaches are reflecting on the regulatory processes and the role professional bodies are playing or not playing in helping the coaching field grow ethically. One respondent made the following thought-provoking statement:

> ***"Coaching, a ubiquitous term, has started to lose its meaning. It covers such a variety of experiences and such a range of coaching competencies and practices that when comparative assessments are made, the "apples" and "oranges" get easily confused. The existence of coaching bodies like ICF don't help in this regard. Coaching is not a profession like accounting, medicine, law. So, accreditation by these bodies is no guarantee of performance to a universal standard. What would be helpful if GIBS, either by itself or with other institutions, developed a directory of coaches based on individual examination by suitably qualified panel of coaches."***

Another respondent expressed a different view: "I think coaching organisations and bodies should be doing more to promote coaching as a way to support and facilitate change in the world and organisation. Also enhancing values and ethics as a key to the future." The link to changes in society was also reflected as individuals spoke about:

> ***"The impact of technology, of digitisation on society and the manner in which society, be it economically or socially, is organized, is changing the very nature of people faster than we may be able to imagine. The differences in generations are becoming bigger, faster, and a response to these changes require new or different way of learning and being in the world."***

The following concluding comment that links the themes suggests a possible way forward:

> ***"I think we need a bigger conversation in the coaching community regarding the next phase of coaching and how we will support business as it grapples with the changes in various industries and indeed in the world. Would love to see a Coaching for the Future Summit."***

Appendix A:
Researcher

Dr Natalie Cunningham
BA (Social Work) Honours, MBA, PhD
Research Associate GIBS



Natalie has recently completed a research project on developing learning theory based on the lived experience of students. She is also leading the GIBS Coaching Landscape Index. She values research and enjoys the field of qualitative research with an emphasis on phenomenology, grounded theory and autoethnography. Natalie enjoys the different roles of coach practitioner, educator, researcher and writer, but defines herself as a leadership and learning activist and believes we need to change the way the world can learn through conversations.

She has always been passionate about coach education and was one of the early pioneers in developing coaching qualifications in South Africa. After attending many international conferences and networking internationally, she joined Wits Business School (on a 70% contract) as director of The Leadership Development Centre with the strong desire to develop a university coaching qualification (2006 to 2011). She was responsible for customising leadership programmes for corporates. She also developed several qualifications, designing the curriculum, resourcing the faculty, and obtaining approval for the qualification. This culminated in her developing the Master of Management in Business and Executive Coaching.

Natalie has a solid grounding in academic theory, but is equally rooted in pragmatism. She has run her own consultancy, Origo Consultants, for the last 30 years. She is an accredited Master Coach with COMENSA, of which the requirement is 2 000 hours of coaching. Natalie has over 5 000 hours of coaching and coaches across seven countries, with 25% of her coaching being done online. In January 2016, Natalie was a finalist for the most influential woman leader in education and training in South Africa by CEO Magazine. She is married and has two adult daughters. She lives in Somerset West in the Western Cape and enjoys nature, music, good food and wine. Natalie has published in peer-reviewed journals, written chapters in books, and edited a coaching book.

Appendix B:
Research partners

We would like to thank our research partners who made this research possible by sharing the research link with their members and databases and actively encouraging them to participate.

- International Coach Federation (ICF), South Africa chapter
- Knowledge Resources
- COMENSA

Appendix D: Coach framework

The most appropriate framework in which to analyse the definitions was the one developed by Cunningham (2017). This framework has various components, but does not project any methodology or theoretical bias on these. The components of coaching that were identified are:

- The coach;
- The client/coachee/executive;
- The context (the business world in which it took place);
- The coaching process;
- An outcome with perceived benefits and challenges; and
- A purpose for coaching.

This is represented graphically in Figure D1 below, a framework that guided the analysis.

There has been much debate over the fact that coaching definitions vary. Possibly if the same aspect/component is being looked at (e.g., outcomes), there would be fewer differences emerging.

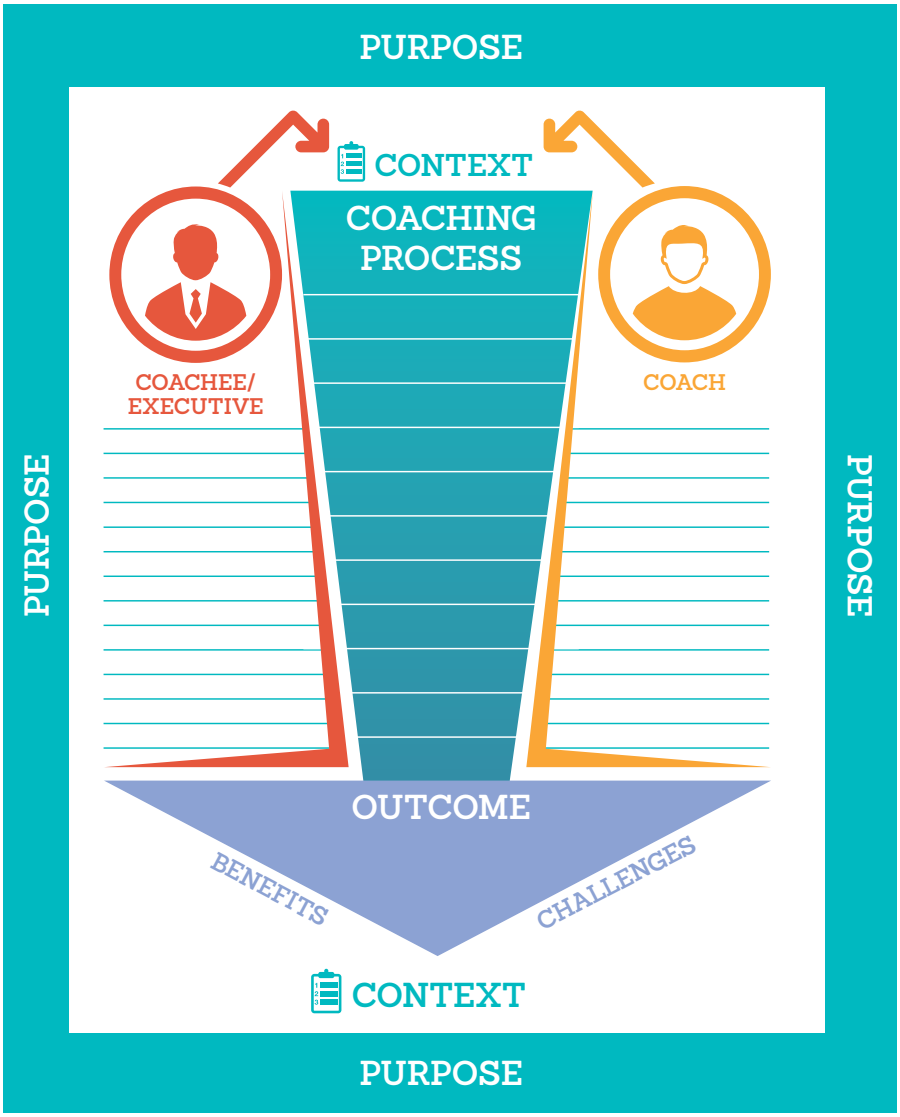


Figure D1: Coaching framework (Cunningham, 2017)

The figure above aims to demonstrate that the interrelationship between the components – the coach, the coachee, and the context (the green-shaded background area) – contributes to the coaching process. The coaching process in turn leads to an outcome. This outcome would also be based within a context and driving this outcome would be the purpose. The graphic aims not to be biased and would allow any theory or evidence to be superimposed on the framework – e.g., if the coach had a narrative approach, this could be the input; but equally if the coach had a cognitive behavioural approach, this could be the input. Thus, the analysis is done in relation to this framework. Each component is analysed separately initially, but then consolidated into the final graphic, which is the model populated with the data.

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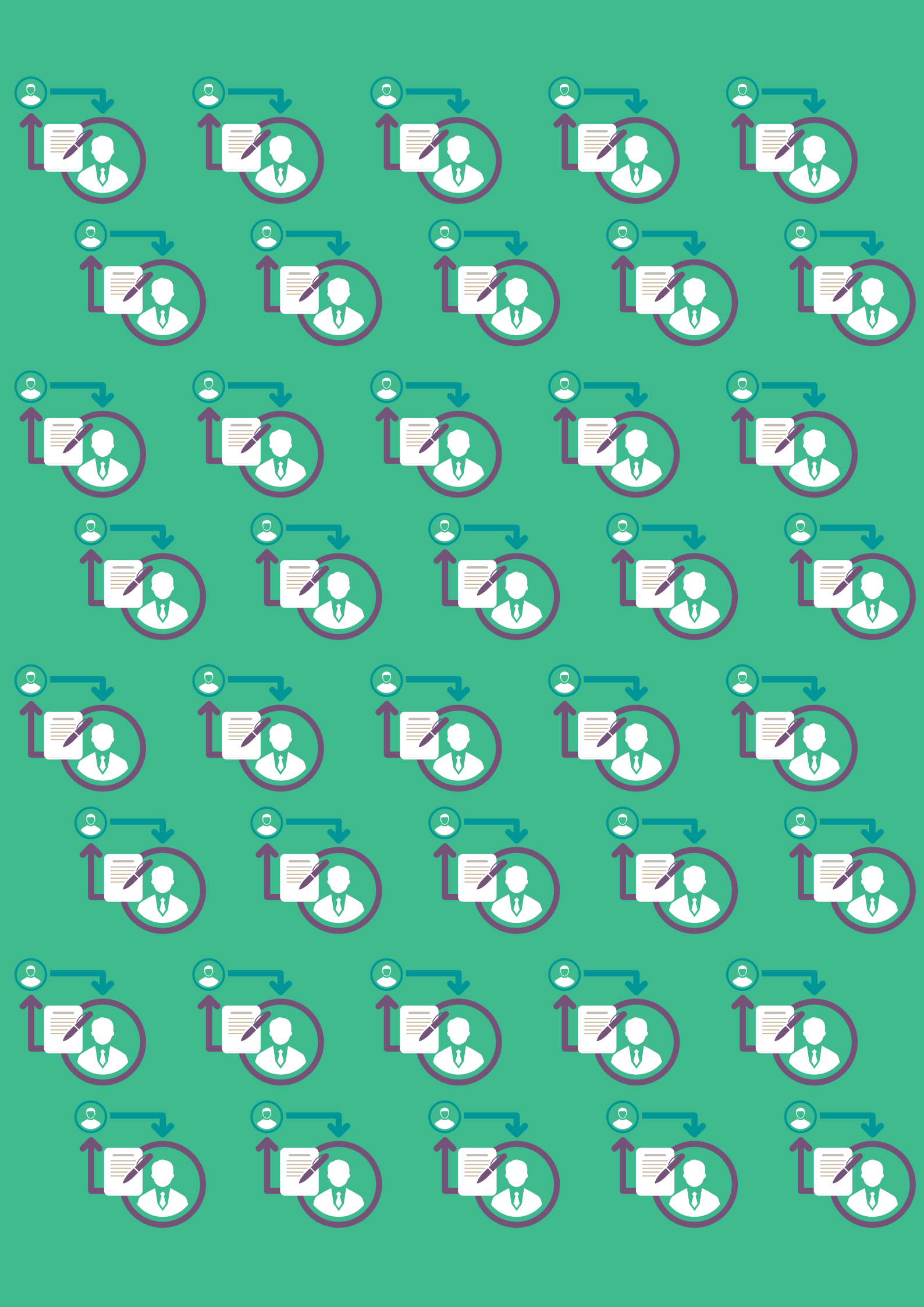
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Gordon Institute of Business Science
University of Pretoria

26 Melville Road, Illovo, Johannesburg
P O Box 787602, Sandton, South Africa, 2146
011 771 4000 | Acumen@gibs.co.za

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