

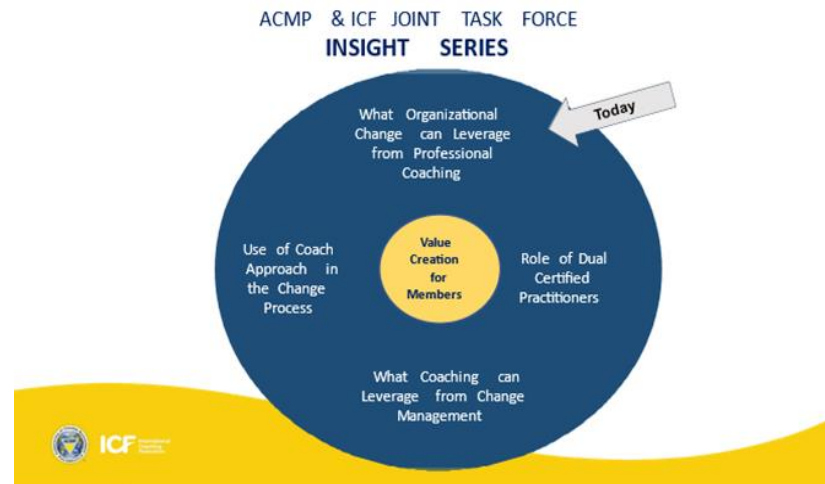


The Power of Both: What Organizational Change Can Leverage from Professional Coaching

The power of both Change Management and Professional Coaching have been long established and respected. The two professions share common client goals including changing from one state to another, improving effectiveness or performance, improving relationships, managing and overcoming resistance, sustaining change, and building accountability.

The ACMP / ICF Task Force was formed by the Association of Change Management Professionals (ACMP) and the International Professional Coaching Federation (ICF). Members from both organizations explore and recommend how these two practices, while complementary and distinct, can work together. The ACMP / ICF Joint Task Force dug deep into this topic by examining the existing research, member surveys, feedback sessions, etc. Presentations at related ACMP and ICF conferences solidified members' interest in creating a joint venture to explore and recommend best practices to integrate Professional Coaching with Change Management initiatives. It is important to note that this ACMP / ICF Joint Task Force's approach is specifically within the context of the professional standards, code of ethics and certification standards of our two sponsoring organizations - ACMP and ICF. While we are excited to contribute this perspective, we are eager to see how this topic evolves with other points of view.

The full scope of the ACMP / ICF Task Force includes:



This first deliverable addresses **What Organizational Change can Leverage from Professional Coaching**, one of four topics within the scope of the task force. Teams have been formed to research the other three topics and will be reaching out again to the community to engage in preliminary discussions for input and feedback, as was done with this topic.

What Large Scale Organizational Change can Leverage from Professional Coaching

The opportunities and possibilities to strategically apply Professional Coaching into Change Management initiatives to overcome resistance, and people-related risks are compelling. The Change Professional partnered with the professional coach can help mitigate the biggest Change Management challenges. Together, they form a force for developing more effective leaders, overcoming stakeholder resistance, speeding adoption of new mindsets, behaviors, processes, and tools, and building employee resilience and change readiness. This accelerates buy-in by applying risk management principles and simultaneously building the capacity of 'change muscle' in organizations to adapt more effectively to future change.

Change is difficult. Organizational Change is costly, complex, complicated, and lengthy. Research shows the largest impediments to successful change are leadership, communications, and employee resilience. If these obstacles are addressed both at the individual level and the system level, chances of success increase dramatically. If Professional Coaches and Change Professionals are jointly helping individuals adapt to change at the individual and system level, they are sure to be more effective in overcoming resistance – personally and systemically, adopting new perspectives and shifting paradigms, and adopting the personal identities, mindsets, and behaviors to ensure long-term success.

Coaching directly impacts change management initiative success.

Research source: HCI Study

*Of what was present in your organization, how helpful was the activity in achieving the goals of the change management initiative(s)?
(Percentage reporting: Very and Extremely Helpful)*

Coaching (avg = 73.3%)	
One-on-one coaching with professional coach practitioner	78%
Work group coaching with professional coach practitioner	78%
Access to manager/leader using coaching skills	70%
Team coaching with professional coach practitioner	67%

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Change is constant. The nature of organizational change requires a proactive and robust plan to address organizational trends and inherent challenges. Often the change is unexpected and requires a fast pace. Disruptors such as technology, economics, pandemics, generational differences are always present. The ability to respond is key. Addressing unproductive reactions such as skepticism, uncertainty, doubt, and overwhelm is key to commitment and action. The success of organizational change depends on the collective individuals' behavior and mindset. Key stakeholders impact change success with their commitment levels. Often Change Professionals and Professional Coaches are brought in only after deadlines have been missed, expenses exceeded, and talent lost.

Trust is an issue. Recently published research from Gartner shows only 43% of employees trust their organization's leaders to act in employees' best interests. (Reimagine HR) This same report states the top five priorities for HR include at number one – Leader and Manager Effectiveness. Professional Coaching can help leaders develop a new approach, including being more authentic, empathetic, and adaptive - in essence adopt a more people-centered approach. Professional coaches, while honoring confidentiality, can uncover overarching themes that may not have been discovered through focus groups, interviews, readiness assessments, etc. Such additional environmental landscape themes can inform and support the goals of the change management initiative to alleviate risk earlier and faster.

Our research highlighted similarities in the two professions. Change Management professionals support implementation success with organizational change initiatives by addressing the people and culture dimensions of the change – with key focus on the leaders who sponsor the change. The Professional Coach helps individuals, teams and groups manage the personal side of change and 'who' an individual must be to lead themselves, others, and change. Some Change Management initiatives already include coaching to build employee engagement and effective sponsorship. **The "Power of Both"** were readily apparent:

- Partnering to build trust and expanding possibilities
- Incorporating culture and values
- Creating psychological safety
- Co-creating the destination.
- Adapting in the moment

Additionally, **common personal characteristics** were identified – being good listeners and communicators, able to connect with people and form relationships, and being curious about underlying motivations. At least **ten professional competencies are shared** by both, including:

1. Maintains the distinctions between Professional Coaching, consulting, psychotherapy, and other support professions.
2. Partners with the client and relevant stakeholders to establish an overall plan and goals.
3. Maintains a relationship of mutual respect and trust.
4. Asks questions that help the client explore beyond current thinking.
5. Reflects or summarizes what the client communicated to ensure clarity and understanding.
6. Recognizes and inquires when there is more to what the client is communicating.
7. Notices what is working to enhance client progress.
8. Invites the client to generate ideas about how they can move forward and what they are willing or able to do.
9. Partners with the client to design goals, actions and accountability measures that integrate and expand new learning.
10. Celebrates the client's progress and successes.

Our research also highlighted the differences in the two professions' approach, certification standards, practices, standards and code of ethics. In summary, Change Management is a standard of doing, while Professional Coaching is a practice of being.

Change Management best practices are prescriptive and process oriented, focused on engaging with sponsors, leaders, groups, and teams with proven best practices to drive collective individual mindset and behavior change in organizations to achieve overall organizational goals. ACMP's Standard for Change Management prescribes an organizational change process and what Change Management Professionals, sponsors and other stakeholders **should be doing**.

Professional Coaching focuses on engaging on a personal level with sponsors, leaders, groups, and teams to help them leverage their own experiences and build skills necessary to lead and create change. ICF has a set of core competencies for coaches that are knowledge and skill based and a code of ethics for client confidentiality which has no equivalent in Change Management.

Our findings on both the similarities and differences between the professions influenced the following ACMP / ICF Joint Task Force recommendations.

Recommendation 1:

Incorporate Change Management and Professional Coaches as strategic members of the change team. Engage these professionals and the Project Team at the beginning of the Change Management process.

Professional Coaching and Change Management Professionals, working better together, will significantly improve the success of (large scale) organizational change initiatives. This joint taskforce began researching, conducting surveys and interviewing practitioners to support and validate how these two professions can best be leveraged. Engaging early in the process will integrate and coordinate the most effective Change Management and Professional Coaching activities. The Task Force leveraged the research between the Human Capital Institute (HCI) and ICF: Building a Professional Coaching Culture for Change Management (see appendix) which identified how Professional Coaching can mitigate risk, e.g:

- Leadership Commitment vs. Abdication
- Employee Resilience vs. Resistance
- Communication Effectiveness vs. Ineffectiveness

The benefits of including Professional Coaches early in the process as strategic team members will enable the team to build a more effective change plan to:

- Support new thinking and the needed cascading process through the organization
- Strengthen leaders' change acumen / 'muscle' / change leadership skills
- Facilitate communication, trust and cross collaboration
- Coach can provoke and facilitate conversations that otherwise wouldn't take place
- Validate coaching as a powerful way to mitigate risk and justify cost of coaching early
- Provide additional support for Sponsor, Leaders, and Leadership Teams

Recommendation 2:

Maintain separate and distinct roles for each to maintain the integrity of the relationship with the client and process.

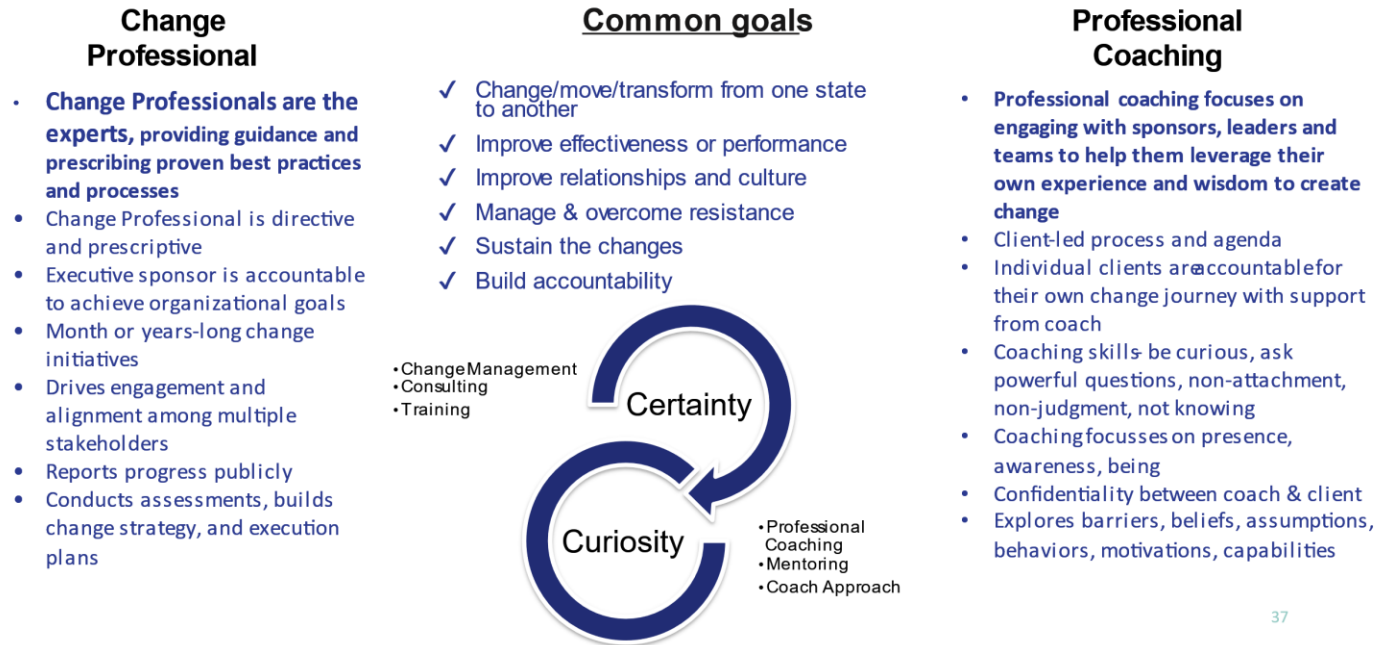
While many professionals hold credentials in both spaces due to their complementary nature, it is strongly recommended that these roles are kept separate and distinct. The profession of Professional Coaching clearly states that while one may be capable in many areas, the coach will coach; not mentor, advise or consult. By definition and charter, the Change Professional advises and consults, hence the separation of duties. This significant difference demands a standards foundation and education in the professions about the distinctions and best practices.

Simply put, Change Management best practices are prescriptive and process oriented. They focus on engaging with sponsors, leaders, groups, and teams with proven best practices to drive collective individual mindset and behavior change in organizations to achieve overall organizational goals. Professional Coaching focuses on engaging with sponsors, leaders, groups, and teams on a personal level to help them leverage their own experiences and build skills to lead and create change.

- The approaches, techniques and benefits are distinct and separate for both professions.
- The Professional Coach's Code of Ethics maintains that while coaches may have competency or credential in other fields, such as psychotherapy, they may not practice both concurrently.
- Confidentiality is an essential element in Coaching Agreements to support personal growth. Confidentiality is not typically an explicit agreement in Change Management as sharing insights and sensitive information about resistance are often required to move the project forward.
- Trust in relationships with clients can be challenged with switching roles or with different segments of the organization.

Stay tuned – the role of dual certification is one of the three remaining topics that the task force is researching.

Two different practices and approaches to help clients



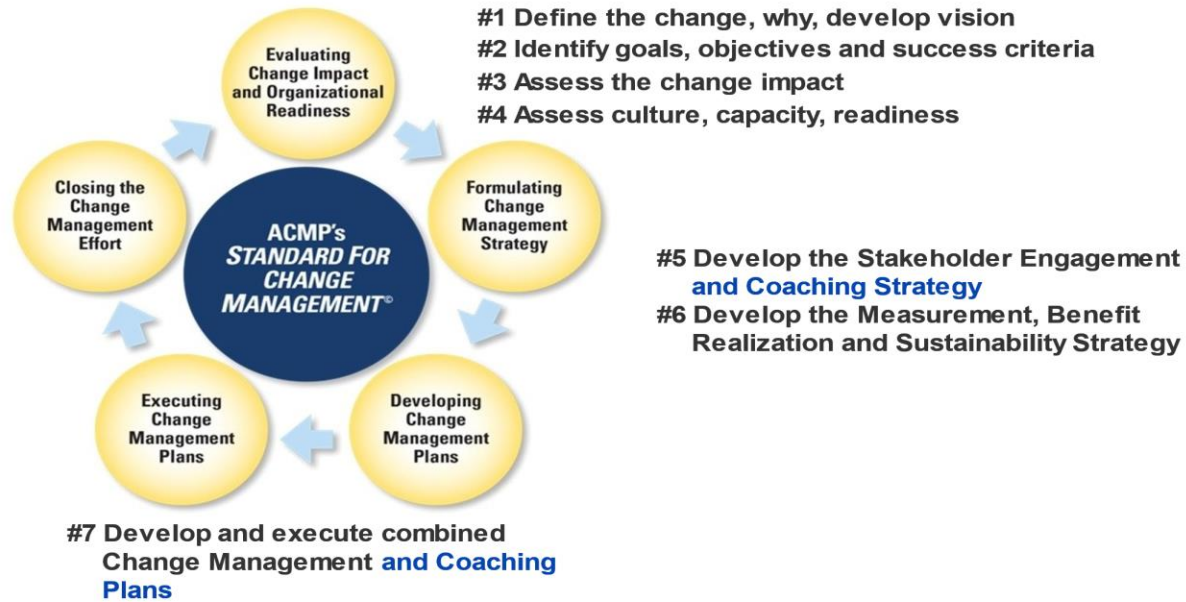
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Recommendation 3:

Identify and incorporate Professional Coaching early and throughout the Change Management process at seven key inflection points for individuals, teams and groups to improve the outcomes and sustainability of organizational change initiatives.

The seven key inflection points were determined by dozens of interviews with Change Management professionals who held a Professional Coaching credential or practiced Professional Coaching within their change efforts. The inflection points are opportunities in the Change Management process for the Change Management Lead to proactively embed Professional Coaching. These seven inflection points were identified as pivotal to meeting the organization's change goals and were then presented at key Change Management and Professional Coaching conferences in 2022 to test this approach.

Coaching Inflections Points in Change Management



Inflection Points	Change Management	Professional Coaching	
	Goals and Activities	Triggers	Goals and Activities
#1 Define the change, why, develop vision #2 Identify goals, objectives and success criteria	- Facilitated by Change Management Lead with Exec Sponsor and Leadership Team - Develop comprehensive definition of the change, vision statement, case for change, why, what success looks like and how to measure it, etc. - Create an accountability framework to demonstrate how success metrics will be achieved. - Creates the foundation for stakeholder engagement, performance, measurement plans, communications strategy, etc	- Lack of clarity and/or commitment on “why” and measurable goals - Lack of buy-in, alignment or collaborative teamwork among leadership team - Conflict, negative or concerning attitudes demonstrated - Political pressure on Senior Leaders, C Suite to be supportive of change - Unwillingness to flag potential risks	- Partner with Coach to help stakeholders get aligned - Deepen understanding of the “why” behind the change. - Clarify business drivers, specific target outcomes, concerns and ‘people risk’. - Outline the role and scope of coaching in change process. - Clarify success criteria and measurement for coaching. - Consider Group coaching to support stakeholders, e.g. senior leadership team.
#3 Assess the change impact #4 Assess culture, capacity and readiness	- Facilitated by Change Management Lead with Executive Sponsor, Leadership Team and various stakeholder groups - Conduct and deliver detailed impact assessment of sponsor and stakeholder readiness, cultural readiness, impact on people, process and technology needed to achieve the overall goal, gain insight into motivations, barriers and potential resistance	- Significant impact on organization structure, roles, responsibilities, hierarchy, compensation - Results will uncover various areas of stakeholder resistance and risks, where extra attention is needed - Leaders who are unprepared, unwilling or unable to deal with these conflicts Tendency to downplay, diminish or negate risk	- Align with Change Lead on high priority resistance and risks to project success - Identify stakeholders (individual, teams and / or groups) who will benefit from coaching
#5 Develop the Stakeholder Engagement and Coaching Strategy	- Change Lead recommends strategies with Exec Sponsor, Leadership Team - Design specific approaches, timeline, and success criteria to	- Complexity and scope of people-related risks - Strong resistance	Develop coaching Strategy for key stakeholders to manage barriers and risks uncovered in impact assessments

#6 Develop the Measurement, Benefit Realization and Sustainability Strategy	close the gap between current and future state and achieve target goals • Leverage findings from impact assessments • Recommend governance and accountability matrix, all strategies including launch, support, sustainability, resistance management, key messaging, employee engagement, adoption, communication, training, etc	• Lack of alignment on target goals and how to achieve them • Resistance to accountability matrix, at any level • Any culture change required with organization or key stakeholders, teams or groups	• Define who, what, when for individual, team or group coaching support • Define process for communicating risks and opportunities with Change Lead while honoring confidentiality
#7 Develop and Execute Combined Change Management and Coaching Plans	• Translate Change and Coaching strategy into detailed action plan and timeline for all change management and coaching activities. • Regular meetings and reviews with each key leader or stakeholder group. • Reports that track and report progress on adoption, achieving business goals, etc.	• Strong resistance, lack of alignment, or perspective / culture change required with particular key stakeholders, teams or groups • Unforeseen emerging issues or risk	• Professional Coach works with Change Professional to develop detailed coaching plan in support of Change Management Plan. • Requirements for Coaching agreements to protect confidentiality are discussed and put in place.

Recommendation 4:

Continue to build awareness and education of the power of the Professional Coaching and Change Management partnership and build a network across the professional communities to promote and drive this partnership forward.

While there is a growing core community of Professional Coaches and Change Professionals that recognize the power and synergies of integrating Professional Coaching and Change Management, there is significant opportunity to expand awareness and engagement of both in organizational change. ACMP and ICF are committed to advancing this work and collaboration globally.

Conclusion

Leaders will find the benefits of integrating Professional Coaching and Change Management in their change efforts will speed implementation, reduce rework and cost, drive an intentional focus on cultivating the critical mindsets and behaviors required for success and put an empathetic spin on the impact to people in the implementation process.

Appendix - References and Resources

1. HCI and ICF - Building a Coaching Culture for Change Management: <https://www.hci.org/research/building-coaching-culture-change-management>
2. HCI and ICF - Building Strong Coaching Cultures for the Future: <https://www.hci.org/research/building-strong-coaching-cultures-future>
3. ACMP Standard for Change Management: https://www.acmpglobal.org/page/the_standard
4. ICF Core Competencies: <https://coachingfederation.org/credentials-and-standards/core-competencies>
5. ICF Code of Ethics: <https://coachingfederation.org/ethics/code-of-ethics>
6. Prosci Best Practices in Change Management: <https://www.prosci.com/resources/articles/change-management-best-practices>
7. Change Management Review, The Change Practitioner as Coach: A Practical Guide: <https://www.changemanagementreview.com/change-practitioner-coach-guide/>
8. Gartner HR Research Identifies New Framework for Organizations to Succeed in Today's Fragmented Workplace: <https://www.gartner.com/en/newsroom/press-releases/2022-10-24-gartner-hr-research-identifies-new-framework-for-organizations-to-succeed-in-todays-fragmented-workplace>

Comparison between Change Management and Professional Coaching		
	Change Management (ACMP)	Professional Coaching (ICF)
Accountability	The Executive or change sponsor establishes the goal and drives stakeholder accountability	The client establishes their goals and is personally driven and accountable
Goals, motivation	An organizational goal typically based on metrics, competition, efficiency, financial, and cultural factors. Motivation is external (not personal), top down, driven by business imperatives.	A personal goal based on internal drivers, e.g. fulfillment, clarity, relationships. Motivation is personal, internal, inherent, identified and deeply felt by client.
Timeframe	Typically, a few months to years	At start of a consulting engagement and/or one hour session
Stakeholders	Can be thousands of stakeholders at multiple levels in the organization with various locations, goals, barriers, cultures, etc.	One individual, team, or group
Client Engagement	Partner with sponsor and change team to prescribe and guide what to do; develop and execute process, engagement, enablement, resistance	Partner with clients in a creative process that inspires them to gain new insights, define new ways of being and maximize their potential, with powerful questions.
Who's the expert?	Change Practitioner are hired as experts to prescribe, recommend, design approaches based on industry standard change management methodology, tools and techniques	Coaches never prescribe, give advice or recommendations. Client is the expert in their life and how to address their issues. Coaches are experts in the coaching process, asking powerful questions to help client uncover their existing wisdom and values.
Confidentiality	Open conversations are needed with multiple, different stakeholders (sponsor, project teams, managers), and can be counterproductive to effectively identify and deal with resistance. Not in Code of Ethics	Confidentiality between coach and client is essential, included in coaching agreement, and in Code of Ethics
Professional skills	Manage complex organizational process, technology and people change initiatives Consulting and relationship management skills Business acumen, ability to translate vision to specific business outcomes	Engage with clients to help them achieve personal goals with thought provoking questions to gain new perspectives decisions, actions, etc. Work 1:1 with individuals, teams or groups