



Coaching Practice Guide for Clients



CONTENTS

Welcome to the Baptist Health Coach Practice	3
Baptist Health Coach Practice Vision	3
The Value of Coaching	4
What Coaching Is and Is Not	4
Differences between Coaching and Mentoring	5
Roles and Responsibilities	6
Coaching Process	7
Are You Ready for Coaching	8
Coaching Partnership Commitments	9
Establish Expectations of Your Coaching Relationship	10
Pre-Meeting Reflection Questions	11
Create the Foundation for Trust	12
My Coaching Development Plan	13
Coaching Agreement Template	14
Initial Coaching Report Template	16
Coaching Session Preparation Tool	17
Final Coaching Session Preparation	18
Final Coaching Report Template	20

IN THIS GUIDE:

This guide includes self-preparation tips for the coaching process, what to expect, how to get the most out of your coaching experience, and a diverse array of tools to help you along the way.

WELCOME TO THE BAPTIST HEALTH COACHING PRACTICE

COACH PRACTICE OVERVIEW

The Baptist Health Coach Practice is a cadre of skilled and trained coaches available to support the development of key leadership talent utilizing the ICF (International Coaching Federation) Core Competencies. Our certified coaches offer a supportive, confidential and future-focused environment where leaders can explore current issues, share their goals/challenges and develop solutions.

Coaching positions the client as the expert. Our coaches promote self-discovery, elicit client-generated solutions and strategies and hold the client accountable and responsible. Leaders can expect improvement in productivity, job satisfaction and goal attainment. Coaching can also expand leaders' capabilities and prepare them for the next level.

Professional coaching provides fresh perspectives, enhanced decision-making skills, greater interpersonal effectiveness and increased confidence.

The process includes:

- Goal setting discussion with the client and their leader
- Coaching duration is 6 months
- Coaching conversations every two weeks
- Client driven agenda for each meeting

BAPTIST HEALTH COACHING PRACTICE VISION

To offer Baptist Health leaders the opportunity to receive leadership development support from a skilled, trained and credentialed professional coach.

To retain and support strategic talent development, unlock potential and hidden talents, and support individual personal and professional growth.

To develop, grow and sustain an industry-leading internal coaching service for Baptist Health leaders that is widely recognized for excellence.

Watch the Baptist Health Internal Coach Practice video [here](#) or scan the QR Code below to learn more.



THE VALUE OF COACHING

Effective coaching programs benefit the client and the organization by promoting a development culture, increasing knowledge sharing, driving performance and expanding networks, as detailed below.

Benefits to the Clients

- Develop skills and receive tools to coach employees.
- Feel a sense of accomplishment as they reach their own goals; their performance often improves.
- Increased motivation and productivity.
- Receive individualized and confidential support on issues affecting their careers.
- Morale and job satisfaction increases.
- Confidence increases.

Benefits to the Organization

- Cost-effective development occurs on the job and is customized for each employee.
- Leader-supervisor relationships are strengthened.
- Productivity increases.
- When employees explore their interests and skills, a good fit between them and their work is ensured.
- High-potential employees are less likely to leave an organizations that invests resources to help them meet their career aspirations

ICF defines coaching as...

“Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.”

WHAT COACHING IS OR IS NOT

It is important that both you and your leader understand what does and does not constitute a coaching relationship, as detailed below

Coaching Is:	Coaching is Not
A partnership between coach and client.	A method to get an expert’s advice on what to do.(That’s “consulting.”)
A process for the client to discover what’s best for him or her.	Observing and learning from a seasoned professional.(That’s “mentoring.”)
A forward-looking, positively focused way to explore options and opportunities.	A way to fix problem employees.(That’s counseling/corrective action.”)

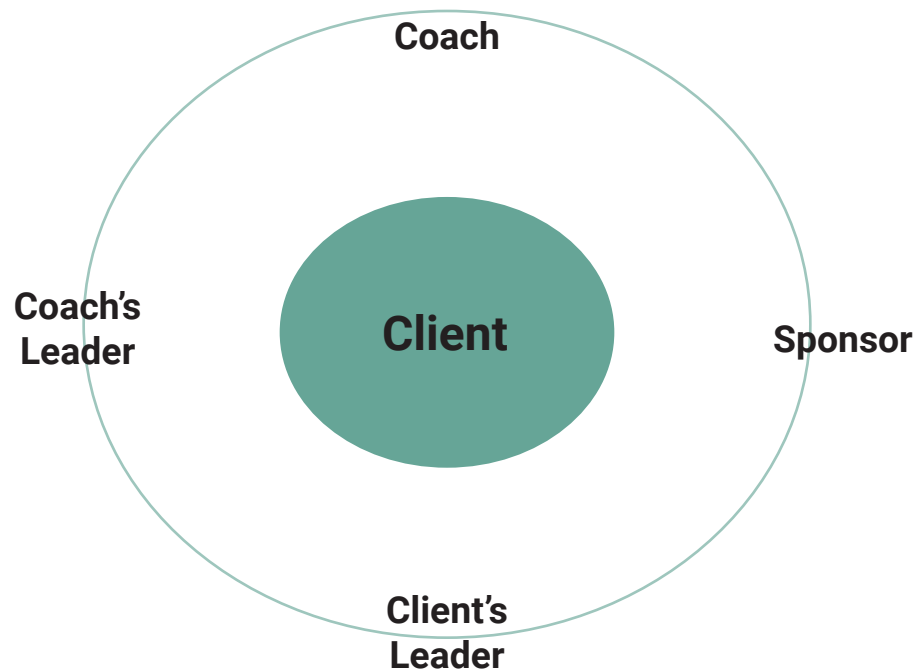
DIFFERENCES BETWEEN COACHING AND MENTORING

Coaching and mentoring differ in their objectives, impact and durations, as detailed below.

	Coaching Asking the right questions for self-discovery and development.	Mentoring Sharing professional experiences and wisdom.
Purpose	Assesses and maximizes an individual's performance in the current or potential new role..	Supports a culture-advising relationship between an experienced and successful leader and an emerging, new or high potential leader.
Definition	A formal development relationship with clearly defined objectives focused on measurable improvements in performance, behavior and capabilities.	A less formal advising relationship between an experienced and successful leader and an emerging, new or high potential leader.
Who	A coach is a trained and certified professional registered with a recognized coaching regulatory body (e.g., International Coach Federation) with a strong understanding of Baptist Health's mission and leadership development needs.	A mentor is an individual identified by the organization as a successful leader who will add value to the identified mentee.
For Whom	High-potential individuals, recently promoted leaders and leaders with a need to improve a specific competency, a desire for focused development and achievement of measurable improvements benefit from coaching.	While most leaders can benefit from mentoring, leaders new to their role or the organization especially benefit from mentoring relationships.
Role	The coach may conduct assessments, 360 interviews, and asks the right questions to help the client in the self-discovery process. The coach also supports the client in the creation of an Individual Development Plan.	The mentor shares his or her personal experiences, lessons learned, tips and tricks. The engagements are about making connections and passing on wisdom.
Engagement	Typically, a three or six-month engagement, with bi-weekly in-person, phone, or video conference. Activities: <ul style="list-style-type: none"> • Conduct an initial meeting with the client and leader to discuss coaching process, confidentiality, agreement, establish coaching goals, and measures of success. • Conduct ongoing bi-weekly coaching sessions applying the ICF Coaching Competencies. • Conduct final coaching session to discuss clients's development progress, get feedback on the coaching experience, and conclude the Coaching Agreement. 	Typically, a twelve-month engagement, with monthly in-person, phone, or video conference. Activities: <ul style="list-style-type: none"> • Establish the relationship: Set expectations regarding time commitment and desired outcomes • Identify mentoring focus: Career growth, support in a new role, ways to navigate the organization, etc. • Share specific learning opportunities and experiences that align with the leader's interests • Mutual agree to end the mentorship when appropriate

ROLES AND RESPONSIBILITIES

The effectiveness of the entire coaching experience is founded on the level of trust between coach and client. Trust depends on transparency and confidentiality. The coach and client's relationship is sacred. Others who are involved (sponsors, HR, etc.) always have a peripheral role. Coaches adhere to the [ICF Code of Ethics](#) and the [Baptist Health South Florida Code of Ethics](#).



Coach – Partners with the client in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. Adheres to the ICF Code of Ethics, Baptist Health South Florida Code of Ethics and Coaching Agreement.

Client – Partners with the coach in a thought-provoking and creative process, comes prepared to all sessions, design actions, holds themselves accountable, and adheres to the Coaching Agreement.

Client's Leader – Partners with the coach and client to set up coaching plan. Leader also provides ongoing development feedback, support and guidance to the client.

Sponsor – An executive leader who supports and nominates high potential leaders to the Baptist Health Coach Practice.

COACHING PROCESS

There are three steps in the coaching process that includes the contracting phase, coaching phase, and concluding phase.

CONTRACTING PHASE

The coach conducts a goal setting meeting with the client and their leader to review and discuss the coaching process, confidentiality, and agreement. They openly discuss the client's competency development opportunities and co-create an Initial Coaching Report outlining strategic and tactical goals and measures of success. At the conclusion of the meeting, the client and leader review and sign the Coaching Agreement

COACHING PHASE

The regularly scheduled developmental sessions make-up the coaching stage of the process. These meetings between the coach and client occur every two weeks, for one hour, for six months to work on the goals set. Meetings should be face-to-face in person or via a virtual video conference. During the coaching session, the client and coach partner to design actions that lead to positive change.

CONCLUDING PHASE

During the concluding phase, the coach and client will conduct a final coaching meeting to; co-create a Final Coaching Report, discuss development progress, and conclude the coaching agreement. Clients will be invited to participate in a Coaching Effectiveness Survey to provide feedback on their coaching experience

ARE YOU READY FOR COACHING

Determining if this is the right time for you to embark on coaching is critical to the coaching experience and success. Clients have to be willing and open to share their experiences, new approaches, and feedback.

Instructions: Use the reflection tool below to determine if you are ready to participate in a coaching partnership. Respond “yes” or “no” to the following questions by putting a checkmark in the appropriate box. A person who is open and ready for coaching will have at least five (5) “yes” responses.

Readiness Questions	Yes	No
Do you believe you can be more effective and happy at work?		
Are you willing to consider new perspectives and try new approaches?		
Do you make learning and development a priority?		
Do you have some goals that keep getting pushed to the back burner?		
Has someone in your life provided just the right help to you at just the right time?		
Are you looking for ways to boost your career?		
Are you willing to accept challenges that will move you toward your goals?		
Do you want more accountability for achieving results?		
Do you have a healthy attitude about receiving both positive and constructive feedback?		
Do you want to work with a coach?		

COACHING PARTNERSHIP COMMITMENTS

It is imperative to understand what you are committing to when entering a coaching agreement.

Instructions: Use the below reflection tool to determine if you are fully committed to participate in a coaching partnership. Respond “yes” or “no” to the following questions by putting a checkmark in the appropriate box.

Commitment	Yes	No
I agree to participate in this coaching relationship for a minimum of three or six- months.		
I agree to shape the coaching relationship to best meet my needs by ; Sharing what I know about my motivations. Co-designing structures that will support me. Asking for changes if the coaching strategy is not working.		
I give the coach permission to; Challenge me with powerful questions. Make requests of me to take action on a goal. Hold me accountable for taking actions to which I commit. Speak to me in a straightforward and honest manner.		
I agree to the following scheduling items; If I am late for an appointment, my session will be shortened. I will reschedule an appointment 24 hours in advance. I will give one month’s notice when I wish to end coaching.		
I agree to the following business arrangements; I am entitled to two one-hour sessions per month. We will meet off-site. I am entitled to unlimited email support.		

GENERAL GUIDELINES FOR CLIENTS AND THEIR LEADERS

Instructions: Use the below as a guide during your contracting/goal setting discussion with the coach and your leader.

1. CONFIDENTIALITY: The Coach adheres to the Baptist Health Code of Ethics and ICF Code of Ethics.

- The coach will not share any information from the coaching relationship unless withholding the information is likely to result in physical harm or severe emotional harm to the client or another individual, or when withholding the information would directly result in significant business harm to Baptist Health.
- The coach will encourage the client to discuss such matters directly with the appropriate individuals.
- Examples of information that the coach must share include but are not limited to: sexual harassment, sexual misconduct, workplace violence, misappropriation of funds, falsification of records, or compliance violations as defined in the Baptist Health Code of Ethics.
- The coach and client will co-create periodic coaching progress reports to be shared by the client with the client's leader.

2. RELATIONSHIP: The coach is a thinking partner for the client. The coach does not give advice, instead helps the client create their own solutions. The agenda for and work within each coaching session is client-centered. The client will set the goals for the sessions with help from the coach at each session.

3. ACCOUNTABILITY: Accountability is a key component of successful coaching. The coaching process positions the client to be solutions-focused, design and take action. Here are some examples:

- The client will receive a preparation guide for each coaching engagement; this is optional and can be completed and returned to the coach before each session is conducted.
- Full participation in and attention to the coaching process is expected throughout the engagement.
- Coaching appointments should be considered important and rescheduled only when necessary. Multiple cancellations by the client may require ending the coaching engagement.
- Accountability for follow-up action rests with the client. The coach does not maintain notes, if the client wishes, he or she may take notes.
- The client will initiate all scheduled phone calls and call the coach at the appointed time.

4. COMMUNICATION: Open communication is important to a successful coaching outcome. The client and coach will immediately bring any concerns about any aspect of the coaching engagement to the other's attention.

PRE-MEETING REFLECTION QUESTIONS

Instructions: This tool will help you reflect and establish your expectations of the relationship before meeting your coach. Bring this information with you to your initial meeting and discuss your responses with your coach..

Questions to Consider	Notes
Where do you hope to be in five years?	
What do you hope to gain from this relationship?	
What role do you expect your coach to play?	
What type of client can the coach expect you to be?	
What are your greatest strengths?	
What are your greatest opportunities?	
Are any topics off-limits?	
What do you think will be challenging about this relationship?	
What criteria would you like to use to evaluate the success of the coaching?	

CREATE THE FOUNDATION FOR TRUST

To build a strong foundation for a coaching relationship, it is critical to build trust and establish expectations at the beginning of the partnership.

Instructions: Use the following questions to guide your first coaching conversation; which helps you get to know one another and establish mutual expectations and goals.

Personal and Professional Background	Notes
What is your education and professional background (include an explanation of your current role and how long you have been with the organization)?	
What are your greatest strengths? Greatest weaknesses?	
What are your short-term career goals? Long-term career goals?	
What are your hobbies/interests outside of work?	
Expectations	Notes
What do you see as my role as your coach?	
What ground rules should we set (e.g., confidentiality, openness, candor)?	
What topics are off limits (e.g., performance reviews, personal lives)?	
What do you think will be challenging about this relationship?	
Are there any topics of urgent interest?	
What topics do you want to cover in our conversations?	
What do you hope to gain from this relationship?	
How do you prefer to communicate between meetings?	
What is the best time for you to meet regularly?	

MY COACHING DEVELOPMENT PLAN

Instructions: This tool will help you reflect and prepare for the development conversation with your leader and coach.

1. What leadership skills do I have that will serve me well in a future role?

2. What other skills/characteristics do I have that will serve me well in a future role?

3. What aspects of coaching will be a stretch for me?

4. In an area that is going to be a stretch for me, what does excellence look like? What will be happening when I am consistently excelling at performing this aspect?

5. What is something I can do today to move closer to a rating of “excellent” in that area?

COACHING AGREEMENT TEMPLATE

Below is a sample of the Coaching Agreement you will review and discuss with your coach and leader during the contracting phase.

Date:

Client Name:

Client Title:

Client Entity:

Baptist Health South Florida

Dear _____, I am looking forward to working with you as your leadership coach in support of your ongoing professional development. This letter of agreement provides the parameters for our coaching engagement.

Terms of the Coaching Engagement between <Client Name> (Client) and <Coach Name> (Coach):

- This coaching engagement will generally include biweekly coaching sessions. Each session will generally run for one hour.
- Coaching will occur on a mutually agreed schedule arranged between client and coach.
- Client and coach will mutually create coaching goals and relevant evaluation metrics.
- The coaching agreement is for a six month duration. Client may discontinue coaching at any time, or may request assignment to a different coach at any time. Such reassignments are at the discretion of the Director of Talent Management, who will make every effort to accommodate the request. If a specific alternate coach is requested, assignment is subject to that coach's availability.
- All coaching communication, including but not limited to goals, achievements, plans, measures of success, and substantive conversations between client and coach are kept confidential by the coach.
- The coach will not disclose client's name as a client without client consent. The coaching relationship is confidential unless the client chooses to disclose it.
- Client understands that the coach may be concurrently coaching other employees of Baptist Health South Florida, and these individuals may be peers, supervisors or other close colleagues of the client. The coach will not disclose such coaching relationships to any other client unless the individual being coached asks the coach to disclose the coaching relationship. The coach adheres to both the International Coach Federation (ICF) Code of Ethics and the Baptist Health Code of Ethics. The coach will not share information gleaned from any coaching relationship, unless withholding the information is likely to result in physical harm or severe emotional harm to the client or another individual, or when withholding the information would directly result in business harm to Baptist Health. The coach will also encourage the client to directly discuss such matters with appropriate individuals. Examples of information that the coach must share include but are not limited to: sexual harassment, sexual misconduct, workplace violence, misappropriation of funds, falsification of records, or compliance violations as defined in the Baptist Health Code of Ethics
- This confidentiality statement shall be as confidential as applicable laws permit. The coaching relationship is not privileged and, as such, a coach's records can be subpoenaed.
- The coach's role is that of a thinking partner for progress, possibility, and growth. Client acknowledges that the agenda and the work on that agenda belong to the client. As such, the client has the latitude to establish the overall goals for the coaching engagement and the goals for each coaching session. The coach will serve as a partner to identify and refine goals.

Logistics of Coaching Sessions:

RESCHEDULING: We will endeavor to provide each other with at least 24 hours' notice if a session must be rescheduled. It is understood that there are times when an emergency will occur and 24 hours' notice will not be possible.

SESSION PROCEDURE: Coaching sessions will be conducted face to face, in person, by phone, or virtual video conference; session duration is typically one hour. Client will initiate all scheduled phone calls and call the coach at the appointed time. With the support of the coach, client will establish goals for each session at its outset. Session goals are generally but not always related to the overall coaching goal.

COMMUNICATION: The coach may make requests of the client as part of the coaching relationship. The client may say yes, decline, or counter-offer. Because open communication is important to a successful outcome, client agrees to immediately bring any concerns about any aspect of the coaching engagement to the coach's attention.

ACCOUNTABILITY: Client is accountable for all follow-up action. The coach does not maintain notes. However, the coach will offer a template for coaching session preparation and follow up for use at the client's discretion.

You are asked to sign this agreement in the space below. Thank you for placing your trust and confidence in me as your coach. I truly look forward to working with you.

BY:

_____/_____
<Coach Name> Date
Agreed:

_____/_____
<Client's Name> Date

_____/_____
<Client's Leader Name> Date

INITIAL COACHING REPORT TEMPLATE

Instructions: Below is a sample of the Initial Coaching Report. You and your coach will co-create this document. It outlines your coaching goals, strategic/tactical goals, and measures of success. This tool will keep you accountable and focused on your goals. It can also be shared with your leader for feedback and input to ensure your personal development goals are aligned with business goals.

Coaching Goals:

Our goal-setting meeting occurred on <day>, <date> and was conducted <in person, by phone, etc.>. During this meeting, we discussed, refined and established the overall goal for this coaching engagement. <Client> has identified the following strategic goals and tactical feeder goals to address over the duration of the coaching engagement

Strategic Goal:

1. Tactical goal 1:
2. Tactical goal 2:

Assessment of Progress:

Progress will be measured by the extent to which <client>:

- 1.
- 2.
- 3.

Initial Observations:

<Client>_____ is an extremely committed and engaged client, etc. <Add commentary dependent upon coaching relationship as established during the initial phases of coaching, contracting, goal setting, etc.>

Prepared by: <Coach> _____

Reviewed by: <Client> _____

COACHING SESSION PREPARATION TOOL

Instructions: Get the most out of your coaching sessions by preparing for them. This tool is for your personal use, increased awareness, and accountability, and is completely optional.

What I want as an outcome for this coaching conversation

Be as specific as possible in your intention for this session.

Accomplishments, success and progress I have had since our last session

The things I did not accomplish & wish I had since our last session.

The challenges I am now experiencing and how I've handled them.

Shifts & awareness (ah-ha's) I've experienced since our last coaching conversation.

Additional thoughts to share with my coach.

FINAL COACHING SESSION PREPARATION TOOL

The approaching end of your coaching engagement offers an opportunity to reflect on all you have accomplished, and to confirm your accountability steps to ensure sustained success.

Instructions: Please review, complete and return a copy of this form to me before the date of our final coaching session. Use extra sheets whenever necessary. We will review it together during our final coaching session.

Initial Coaching Goals: Add goals from the Initial report.

Assess your level of satisfaction with your goal accomplishment (1 = Low - 10 = High)

1 2 3 4 5 6 7 8 9 10

Additional Interim Coaching Goals (if any):

Assess your level of satisfaction with your goal accomplishment (1 = Low - 10 = High)

1 2 3 4 5 6 7 8 9 10

Major Accomplishments and successes

- Looking back on the time since our initial coaching meeting, please identify the one or two most significant accomplishments or successes that you have achieved. What – or who – was most helpful to each accomplishment or success?

Things I did not accomplish & wish I had

- Similarly, please identify anything that you wished you had accomplished but did not. Next to each item you list, indicate what the barrier was that got in your way. Also, indicate if the item continues to be important for you

What I need to sustain success

- How will you ensure that the accomplishments and successes you have achieved will be sustained in the long run? Who or what will help to keep you on track?

Challenges that I may encounter

- Given what you know at this time, are there any personal or professional challenges that you are likely to encounter in sustaining your success? Please list these and beside each, provide any ideas you have to address them.

Additional thoughts about my coaching engagement

- Include anything else that you wish to share.

FINAL COACHING REPORT TEMPLATE

Instructions: Below is a sample of the Final Coaching Report. You and your coach will co-create this document. It outlines the goals set in the Initial Coaching Report and highlights your progress made on those goals. This tool will keep you accountable to achieve your goals. It can also be shared with your leader for feedback from his/her perspective. It also concludes the coaching agreement.

Final Coaching Report - (Client Name)

Coaching Goals and Progress: <Note: Identify one or at most, two goals for the six-month engagement.>

<Client name> identified the following goal(s) to accomplish over the course of our coaching engagement:

<Describe Goal>

<List Measures of Success>; Describe client progress. Be as specific as possible.

<Describe Goal>

<List Measures of Success>; Describe client progress. Be as specific as possible.

Overall Observations:

Coach comments and observations. Note any specific outstanding accomplishments or challenges.

Prepared by: <Coach>

Reviewed by: <Client>

**When it comes to coaching
leaders for career growth and
development...**

WE'RE ALL IN



Baptist Health