

The 2009 Sherpa Executive Coaching Survey

Every crisis calls for great leadership. Today, a generation of leaders is being severely tested. One bad decision, even one bad attitude in top management can cost people their jobs.

That's why executive coaching is an essential development tool for leaders at every level. Each year, the Sherpa Executive Coaching Survey offers insight into leadership development and executive coaching. For the fourth year in a row, the survey has gathered information from coaches themselves and from those who hire them.

Ideally, executive coaching creates positive changes in business behavior in a limited time frame. But coaches bring wildly different levels of training, skill and experience to the job. Selecting the right coach is important. Choices must be made: Who gets a coach? How are services delivered? How much should this cost?

The Sherpa Executive Coaching Survey helps people make those decisions and teaches them how to measure return on investment.

The 2009 survey was conducted by Sherpa Coaching, an executive coach training and certification institute in Cincinnati, Ohio, USA, and sponsored by the executive education programs at Texas Christian University in Fort Worth, Texas and the University of Georgia in Athens, Georgia.

The Sherpa Executive Coaching Survey is unique in three important ways:

1. The survey focuses on executive coaching, with an open invitation for global participation.
2. The fourth annual survey allows clear identification of industry trends.
3. Complete results are released rapidly, at no charge, for the betterment of the profession.

Since this survey deals with executive coaching, any findings or response rates attributed to coaches come from executive coaches only. In some cases, we provide responses and data from life and personal coaches. These findings are always clearly identified as such.



The University of Georgia
*Center for Continuing Education
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Executive Summary

As leaders look to improve their organizations, they pay special attention to developing those who will follow them, and to creating new rising stars. Executive coaching is a personal service designed to aid those transitions.

Executive coaching is a maturing industry, with more veteran coaches among the ranks than ever before. Those coaches are more highly trained, as well.

Coaching's credibility as a leadership development tool is rising, and standards for practice and process are being developed.

Executive coaching trends include:

- In-person coaching as opposed to telephone delivery.
- Universal standards of practice, similar to accounting and financial planning.
- Regular and structured meetings, with fixed-length engagements.
- Adoption of industry standards for training and certification.

The 2009 report answers critical questions:

- What is executive coaching?
- Who gets a coach?
- How are services delivered?
- Who becomes a coach?
- How do they get their training?
- How much does coaching cost?
- Is it worth the money?



Road warrior: Executive coaching author Marshall Goldsmith delivered 150+ speeches during 2008.

Our fourth annual survey drew 1,500 participants, bringing margins of error down to 2.6%.

The Sherpa Executive Coaching Survey is in its fourth year. Based on increasing participation every year, the 2009 survey accurately identifies changes and trends in industry practices. For the first time, we can separate answers by age and gender. More on the survey's methodology is available in the appendices.

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What is executive coaching?

It's not always clear to everyone what coaching really is. Many consultants, trainers, mentors and counselors are jumping on the bandwagon, using the term 'coach' to describe their work.

This survey's sponsors believe it is important to create a clear definition of executive coaching, in order to avoid confusion with unrelated activities. They define executive coaching as:



“Executive coaching means: regular meetings between a business leader and a trained facilitator, designed to produce positive changes in business behavior in a limited time frame.”

This definition clarifies:

| | |
|----------------------|--|
| - who coaches are | trained facilitators (not consultants, counselors, trainers or mentors.) |
| - what coaches do | produce positive changes in business behavior. |
| - when things happen | on a set schedule with a limited time frame. |

Originally published in “*The Sherpa Guide: Process-Driven Executive Coaching*” (Thomson 2005), this definition is becoming widely recognized. In 2007, the European Foundation for Management Development adopted this definition in communication with its members in seventy countries.

Executive coaches, as a general rule,

- do not share their own experience (as do mentors),
- do not give advice (as do consultants),
- do not impart specific knowledge (as trainers do) and
- avoid personal issues. (the role of a counselor or therapist or life coach)

Why Are Executive Coaches Used?

Equilibrium Arrives

The trend that has clients using more coaching for leadership development and less for problem-solving has run its course. Leadership development is the most common reason cited for coaching, but it's no longer gaining market share.

In the early days of coaching, an executive who wasn't living up to expectations was the most likely to be assigned a coach.

More coaching is now devoted to developing leadership skills, and a smaller share of coaching is designed to address specific problems.

As a result, having an executive coach can be a status symbol, the mark of an up and coming leader being groomed for greater possibilities.

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The Sherpa survey asked coaches, HR professionals and coaching clients to share the ways they saw coaching used. Coaching is widely used as a leadership development tool.

Over four years' time, the use of coaching 'primarily for leadership development' has picked up from 43% to 50%, while coaching to 'address a specific problem or challenge' dropped from 37% down to 32%. A smaller group tells us that executive coaching is most needed by people in transition: promotions, transfers and new hires.

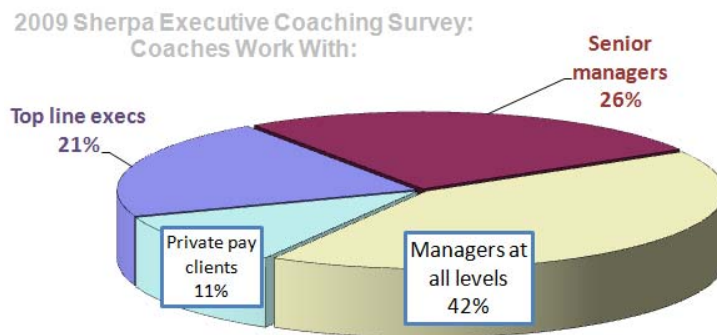


There's been a change in the reasons for coaching, but the change is over, and executive coaching appears to have found a balance. A significant shift towards leadership development was seen between our 2006

and 2007 surveys, followed by a slight increase in the 2008 results. Our 2009 survey shows complete equilibrium. Neither coaches nor HR professionals report any change in the reasons coaching is used.

Who Gets a Coach?

42% of the organizations who use coaching allow managers at every level to participate, while 47% limit coaching to senior managers and executives.



The allocation of coaching services by rank has remained relatively steady over the years, but there is a slight trend now toward coaching for senior executives only (18% 3 years ago, 21% now) and a trend away from coaching at all levels: (46% three years ago, 42% now). If this is a function of tight budgets and a lean economy, we'll see further changes in our 2010 study.

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Coaching by the Book?

There is no movement toward unionization, regulation or licensing of coaches in the US. That means coaches, clients and training organizations will have to sort a few things out for themselves.

1. Can every coach come up with their own methodology, or will a standard set of practices emerge, such as those in use by accountants and financial planners?
2. Can coach training organizations continue to offer hundreds of different processes, some developed and offered with limited oversight or field testing?
3. Can clients and purchasers of coaching services accept a broad range of approaches, or do they want a single standard of practice that tends to guarantee consistent results?

There's very strong support for formal certification. Overall, 72% of executive coaches say formal certification is either 'very important' or 'absolutely essential'. This support is up 10% over the last three years. 77% of women and 65% of men show strong support. *

If everyone gets trained, the question becomes: what do they learn? At the moment, there are dozens of models for coaching, and dozens of schools with unique curricula.



Among executive coaches, a majority of both men and women favor a recognized, standard process. Women support standards slightly more than men, at 57% to 53%. On the opposite side of the discussion, 11% of men, but only 2% of women say a standard process is not necessary.

Support for standards has increased slightly over the years. Overall, 55% of executive coaches say 'a recognized, standard process for coaching, similar to the accounting or financial planning professions' is 'very important' or 'absolutely essential', up from 50% two years back. In firms with 100 employees or more, 76% of executive coaches support the concept of a standard process.

Clients and purchasers of coaching services want standards even more than coaches do: 74% of coaching clients and HR professionals support a standard process, up from 68% two years ago.

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Certification and Practice Standards: Regional Trends

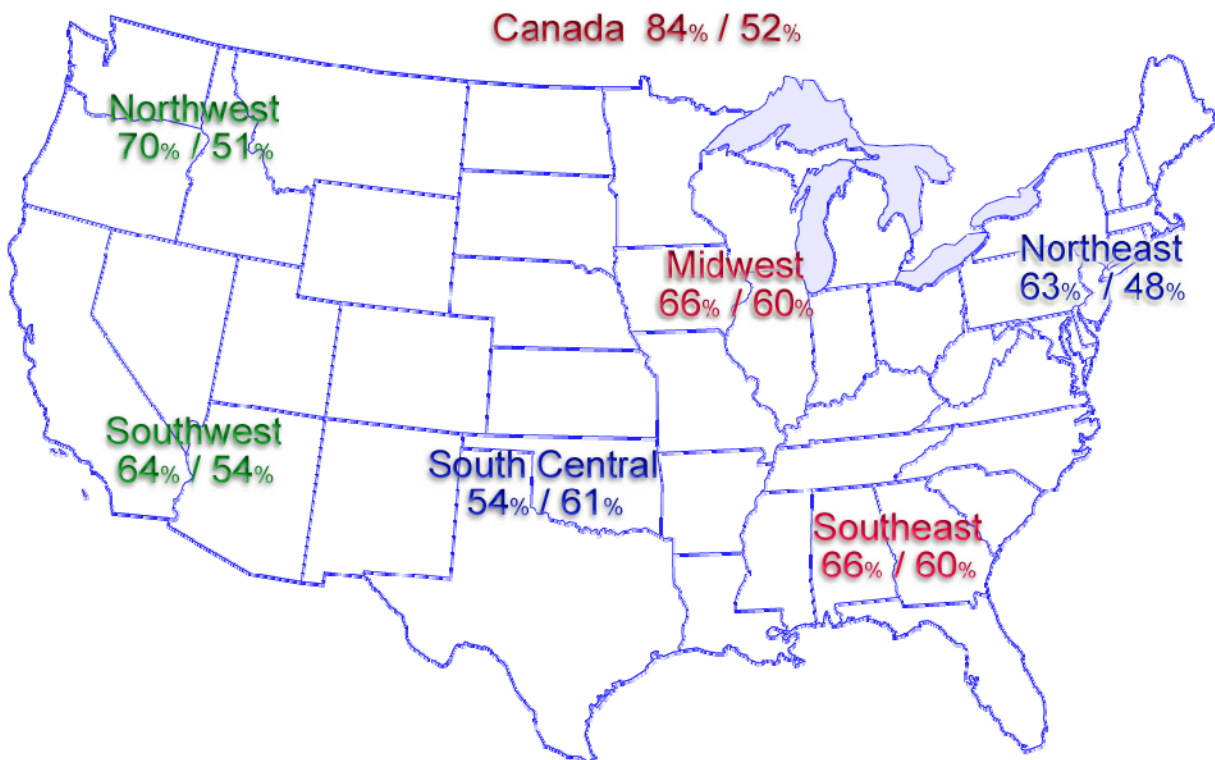
Canadian coaches support certification in numbers greater than any region in the US, at 84%

In the USA, support for a recognized, standard process is higher in the heartland. Support runs at 60% in the Midwest, Southeast and South Central US, while it's just above 50% in Canada, the Northeast and West Coast.

The following map shows two numbers: support for formal certification, followed by support for standards of practice, by region:

2009 Sherpa Survey: Executive Coaches showing strong support for: formal certification / practice standards

high - moderate - low



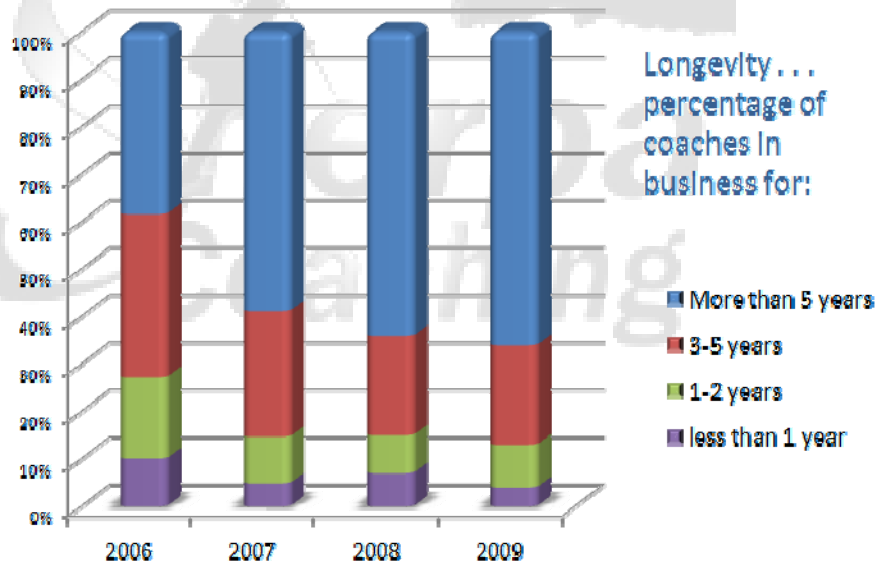
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Who Is Doing The Coaching?

Executive coaches are an independent breed.

Almost half the executive coaches we surveyed were one-person shops, and another 30% reports a company size of 2-5.

There are more veteran coaches among smaller firms (100 employees or less) than among larger firms.



The field of coaching seems to be stabilizing. Looking at executive and life coaches as a group, the number of 5-year veterans is growing, and new entrants form a smaller percentage of the industry. This does not necessarily mean that growth is slowing. It simply shows that coaching as an industry is maturing, and a growing number of coaches are established veterans who managed to break into the industry early, and make a career of it.

Both men and women in the field can carve out a career in executive coaching, with men in the business five years or longer at 70% of our sample and 5-year veteran women at 62%. Female executive coaches, on average, are 49 years old, while men's average age is 53.

Men have a slightly higher number of employer-paid clients, as opposed to self-pay, but the gap is small, and probably a reflection of years in the business.

Equal Opportunity Profession?

In our survey, men and women are about equally represented among the ranks of executive coaches. Men and women work with the same number of clients, and charge the same rates.



For HR professionals in years past, general business and consulting experience was the best way to gain respect as an executive coach. This year, training and certification as a coach has surpassed both general and industry-specific experience among HR professionals in larger firms, by a 10-point margin.

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Less than two percent of our respondents feel that therapy or counseling is the best background for an executive coach. This holds true for HR professionals, executive coaches, and coaching clients. Life coaches, who deal with personal issues far more often, cite counseling as the best background just 4% of the time.

Delivery Methods for Coaching:

The delivery of both executive coaching and training for coaches is moving toward in-person encounters. Despite improved remote communication without personal contact, in-person coaching is gaining in favor as the most effective delivery method. As compared to phone, email and webcam delivery, both men and women deliver more of their coaching in person.



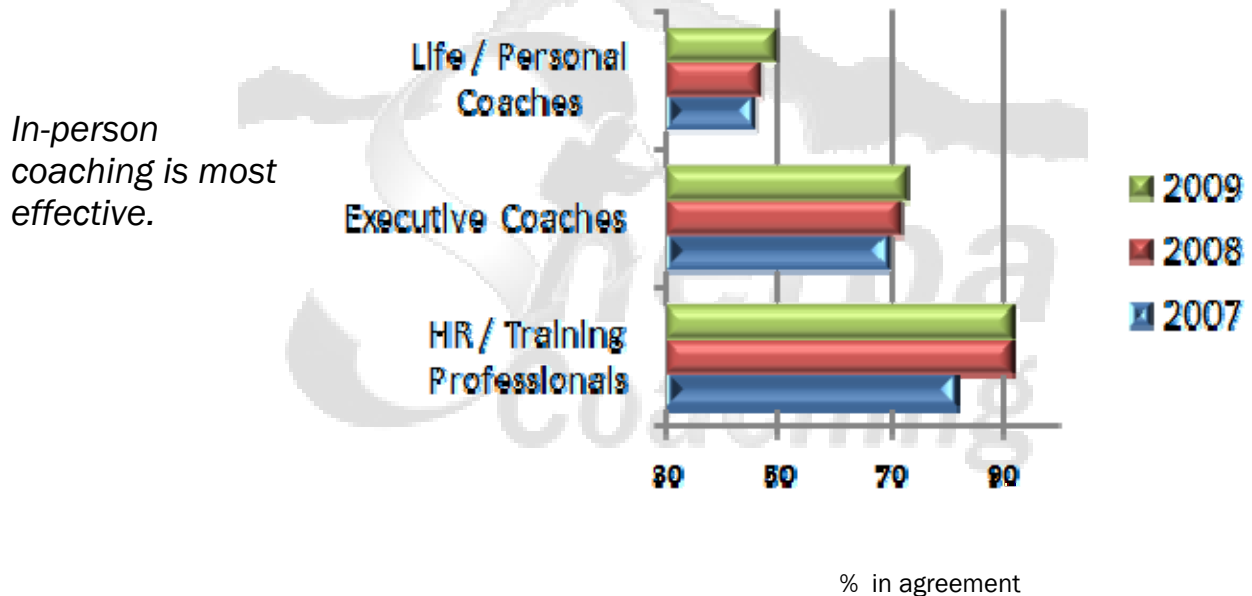
- In-person delivery accounts for more coaching than any other method: 47% of the total, up from 40% in 2006. It's more common than phone coaching at every level, from sole proprietors who hire a coach, all the way to firms of 1,000 or more.
- 73% of executive coaches believe in-person delivery is most effective, a figure that has increased every year since 2006.
- 92% of HR professionals and coaching clients believe in-person delivery is the most effective.

Women coach by phone more often than men, and they have stronger opinions about the phone as a delivery method. Women coach on the phone almost 40% of the time. 34% of women feel it's the best way to coach. Men coach by phone 37% of the time, but only 17% feel it's most effective.

The total amount of executive coaching done on the phone dropped this year, to 38% of services delivered. Comparing individual responses this year against last, we found 30 coaches who dropped alternate methods and went strictly to In-person meetings. Only 15 'in-person only' coaches added phone delivery to their practice. Globally, life coaches do about 45% of their work on the telephone, but half of them now say that in-person delivery is most effective.

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The graph below shows the percentage of respondents, by type, who say that in-person coaching is the most effective.



Coaches in small firms (under 100 employees), work in person 8-10% more often than they coach on the phone, a change from last year when the two methods ranked equally. Less than 25% say that telephone coaching is more effective than in-person meetings.

Among coaches in companies of over 100 employees, use of the phone drops to 25% of coaching, and support for the effectiveness of telephone coaching virtually vanishes. This may reflect the fact that larger companies are more likely to have an in-house coaching staff, which makes personal meetings more convenient.

The webcam can introduce facial expression and body language into a remote conversation, yet has a market share of less than five percent. Email is used for about 10% of coaching activity, but is rated near zero as the most effective delivery method for coaching.

Let's leave email coaches out of the sample for a minute, and look at both in-person coaches and phone coaches across the US and Canada. 52% of our responding coaches are in-person, 48% phone. In every region, these executive coaches agree that in-person coaching is more effective than the phone, by margins ranging from 60% all the way up to 90%.



Cincinnati Enquirer coverage explains executive coaching

In practice, telephone coaching maintains a slight lead over in-person coaching in the Northwest US and Canada, at 53% to 47%. Everywhere else, in-person coaching is the most common practice.

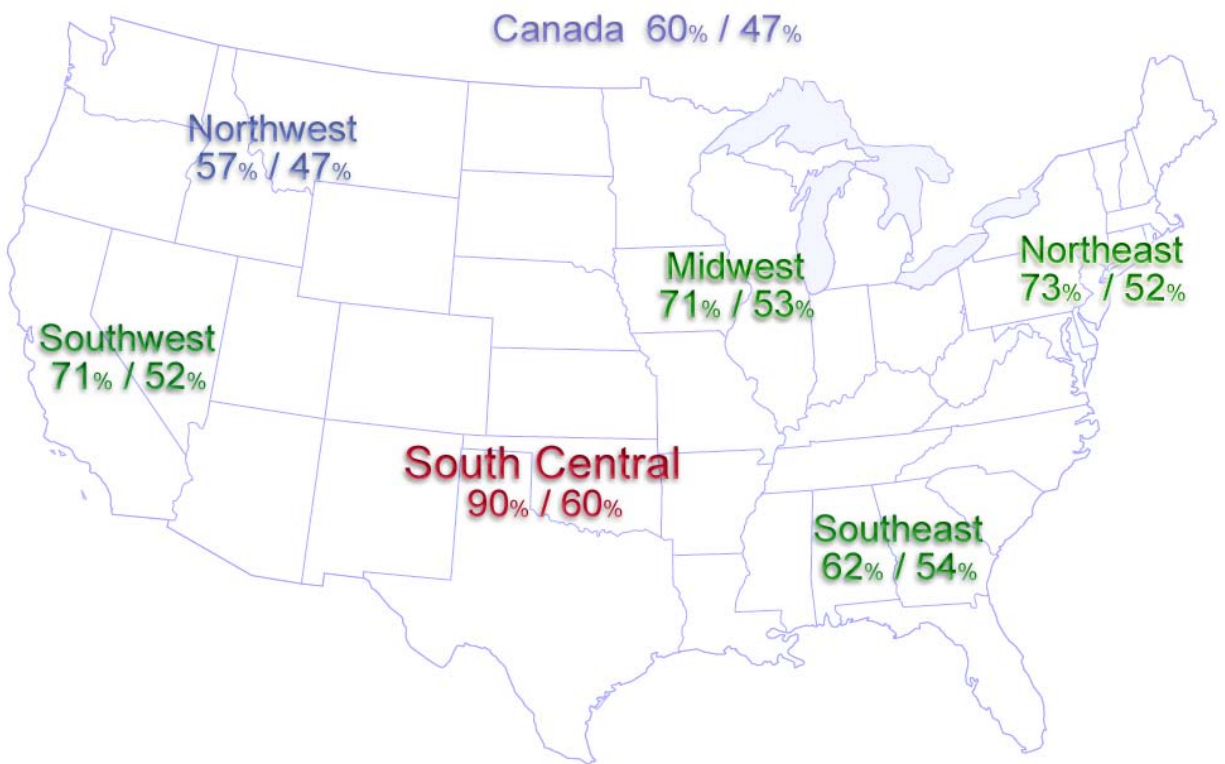
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There are sharp differences in delivery methods by region. We've mapped coaches' responses to the 'live vs. phone' question, showing their both opinion and practice.

For each region in the map below, we show the percentage of this sample that believe in-person coaching is most effective, followed by the percentage that actually conduct their coaching in person.

2009 Sherpa Survey: Percent of executive Coaches showing In-person coaching is 'most effective' / 'usual delivery method'

support and adoption of in-person is: *high* - *moderate* - *low*



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How Long Does Coaching Take?

How long should a coaching engagement last? A majority in every group favors limited-term engagements lasting six months or less. The trend is running in favor of shorter, limited engagements, too.

61% of executive coaches say a coaching engagement should run six months or less. That's an increase from 53% in our 2006 results. HR and training professionals favor limited engagements at a 68% rate.

Only 19% of executive coaches favor 'open-ended' arrangements, a number that's dropped from 25% in our 2006 survey.

A majority of personal and life coaches favor 6 months and under, with a 59% score. They prefer open-ended arrangements 34% of the time.

Larger firms who use executive coaches insist, far more often than smaller firms, that executive coaches have a detailed process with built-in time limits.

Coaching on a schedule is the norm, and the way services are delivered has been constant over the years. Most coaches and clients meet once a week (28%) or every other week (33%). Executive coaches have to manage a calendar, as they provide services predictably and efficiently. Accordingly, only 24% of executive and life coaches favor 'as needed' meetings, while 44% of clients and HR professionals would opt for this flexible arrangement.



Sherpa Guide authors on Clear Channel talk radio

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Where's the Money?

Executive coaches come in two types: employees of an organization who provide services to fellow employees (internal coaches) and independent service providers (external coaches).

90% of organizations who hire coaches will use a combination of internal and external service providers. 4% rely exclusively on internal coaches. 6% use external coaches only. This division of labor between staff and outside services hasn't changed much in the last three years. The way people answer this question depends, of course, on the way they define coaching, and what activities they include under the coaching banner.

Pay Scale:

Earnings are down for veteran executive coaches, up for newer practitioners. Life coaches have seen a collapse in earnings over the last two years.

Over the last two years, the number of executive coaches who report employers paying for some or all of their engagements has remained constant. Globally, coaches working exclusively with 'employer-paid' clients are now 55% of the population, up from 49% 3 years ago. About half of American coaches are exclusively employer-paid, as are 60% of Canadian coaches.

Out of Alignment?

Clients report that they pay \$225 an hour for executive coaching. Executive coaches say they charge \$295.
Is there an explanation for the discrepancy?

How much do they pay? Last year, HR professionals reported paying an average of \$285 per hour coaching services, up from \$225 in the 2006 survey. As 2009 begins, the numbers have sagged back to the \$220 level.

We didn't ask about salaries for internal coaches, but we do know how much independent coaches charge and earn. Executive coaches report that they charge \$295 per hour, \$70 more than what purchasers say they pay. Why the discrepancy? It could be that coaches quote their 'list price', and buyers report what they are actually paying.

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Annual Earnings for Executive Coaches.

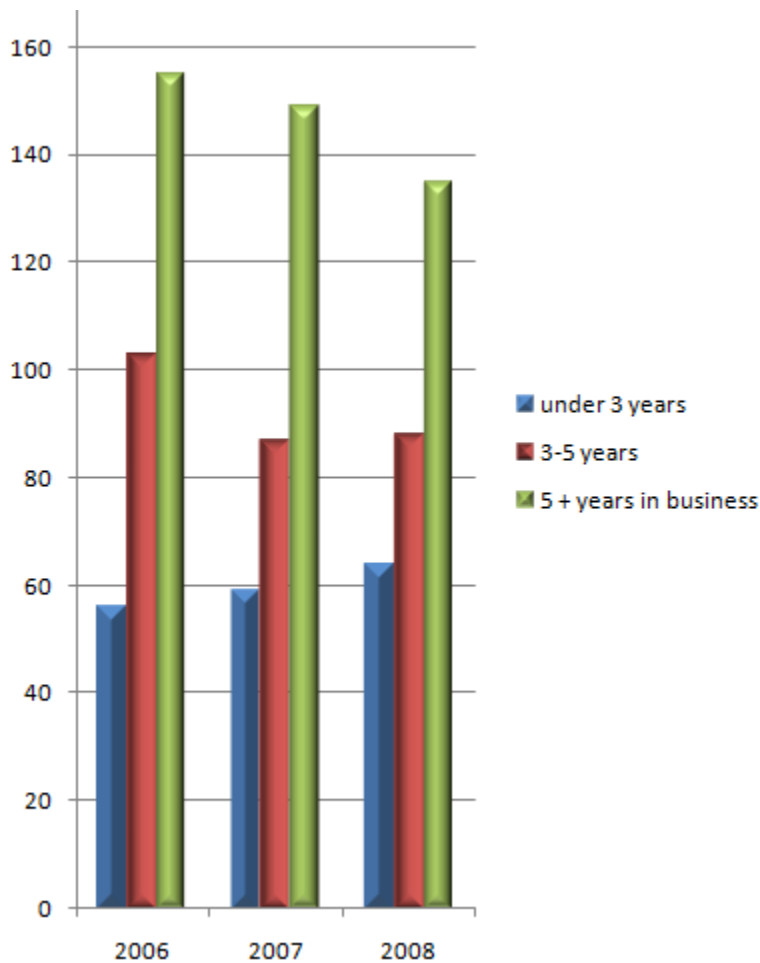
As with any trade, more time in business means more money. Here are the hourly and annual earnings for executive coaches, by the length of time they have been in business:

2009 survey:

Under 3 years: \$250, \$ 64,000
3-5 years: \$260, \$ 88,300
5+ years: \$335, \$134,800

2008 survey:

Under 3 years: \$215, \$ 59,000
3-5 years: \$260, \$ 87,200
5+ years: \$361, \$149,400



Annual earnings were up 8% for coaches in business under 3 years. This may be a result of increased demand for coaching, raising prices at entry level.

Earnings were flat for 3-5 year veterans after a 15% drop last year.

Earnings went down this year by 10% for coaches in business five years or more, after a 4% drop last year. This could be a natural result of having a larger number of 5 year veterans plying their trade, as the executive coaching industry matures.

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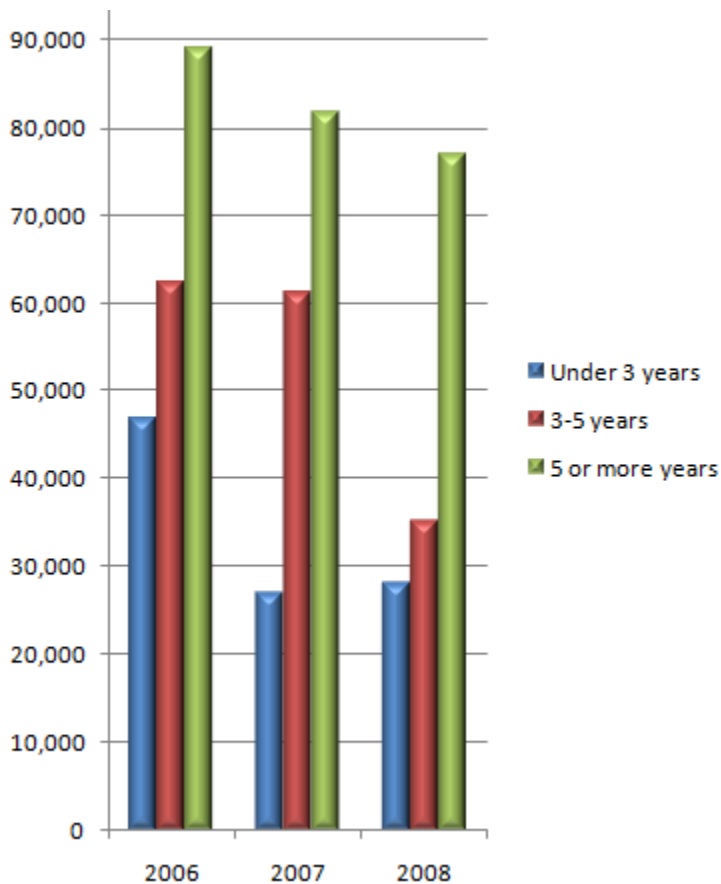
Annual Earnings for Life Coaches

Earnings appear to be under heavy pressure for life coaches.

Here's the way life coach earnings have looked, by tenure, for the last three years.

| Tenure | 2008-9 | 2007-8 | 2006-7 |
|-----------------|----------|----------|----------|
| Under 3 years | \$28,200 | \$27,000 | \$47,000 |
| 3-5 years | \$35,230 | \$61,200 | \$62,500 |
| 5 or more years | \$77,000 | \$81,700 | \$88,950 |

Annual earnings for life coaches



Our data shows a substantial drop in earnings for newer life coaches. Last year, earnings for coaches in business under 3 years dropped 40%. This year, those depressed levels were unchanged, and we saw a startling new development: Earnings for life coaches in business 3-5 years plummeted, losing over 40%, as well.

Hourly billing rates remained steady, but life coaches at every level have been reporting marked decreases in the number of clients they serve.

One cautionary note: These figures are self-reported by coaches who took the survey, and our small sample size may create a margin of error of 10 percent. The changes are dramatic enough that we feel compelled to report them.

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Calculating ROI for Executive Coaching

Leaders operate in a challenging economy. Decisions have to be reasoned, sharp and focused. If we spend money, does it add to revenues? Reduce costs? Boost productivity? A great deal of our decision-making is driven by numbers.

Return on investment. ROI. How much money is gained or lost, compared to an amount invested? 87% of HR professionals and coaching clients see the value of executive coaching as 'somewhat high' or 'very high'. In equal numbers, 87% do not have any prescribed process to measure that value.



A mere 13% of HR professionals calculate ROI. That's up from 7%, a few years back, but it's still a small fraction. As in years past, almost everyone uses anecdotal evidence, or doesn't monitor ROI for coaching. Larger companies (1000 employees and up) don't try to measure ROI any more often than smaller firms.

The amount of money spent on coaching is significant, and it's growing. HR professionals say coaches are usually engaged for people who need leadership development, and they tell us demographics will boost demand for coaching. Despite all the expense, few people seem to track return on investment. There is a way to do it.

The Sherpa ROI formula goes like this:

1. Estimate the total value of resolving an issue or issues:

Example: Avoided \$55,000 in turnover costs, increased productivity by \$45,000
 Total benefit: \$100,000

2. Multiply by the percentage of the improvement attributable to coaching
(in this example, 50% of the improvement comes from coaching)
 Coaching benefit \$50,000 (#1 times #2: 50% of \$100 K)

3. Factor in our degree of confidence in our estimates:
(In this example, we are 90% sure that our estimates in steps 1 and 2 are correct.)
 Adjusted coaching benefit: 45,000 (#2 times #3: \$50,000 times 0.9)

4. Subtract the total cost of coaching (say, \$15,000)
 Net benefit \$30,000 (#3 minus #4)

5. Calculate ROI: Divide net benefit (step 4: \$30k) by coaching cost (\$15k)
 ROI = 200% . (#4 divided by #3: 30K/15K = 2.00)

Granted, there are value judgments involved in this ROI calculation. How much is a project or an achievement worth? How much contribution did coaching make? What's the total, landed cost of coaching? That is why the Sherpa ROI formula factors in a degree of certainty, in effect reducing the calculated value of coaching directly, to account for subjectivity in the other variables in the formula. To get the best results, coach, client and executive contact should all contribute to the calculations.

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Training the Coaches

Training and certification for executive coaches is gaining momentum. 73% of executive coaches say that formal training and certification is either 'very important' or 'absolutely essential', up from 62% three years ago. Among HR professionals and coaching clients, eight of ten hold the same opinion.

The larger the size of their organization, the more important certification is for an executive coach:

Percent saying formal certification is very important or essential:

| Company size | 1 | 2-5 | 6-9 | 10-99 | 100-999 | 1000+ |
|--------------|-----|-----|-----|-------|---------|-------|
| % response | 49% | 55% | 60% | 66% | 68% | 75% |

Female coaches, at 77%, value certification more than male coaches, at 64%.

Most qualified to certify a training program? When asked to name the highest authority, 72% of HR professionals choose 'no opinion'.

One trade association, the International Coach Federation (ICF), certifies training courses for both executive and life coaches. Most life coaches favor the ICF as an accrediting body. A declining number of executive coaches do. Support for the ICF among executive coaches has dropped from 62% to 39% in three years' time.

A similar trend is underway with HR professionals, coaching clients and those who hire coaches. For the first time this year, university-based executive education edged out the ICF as 'most qualified to certify a training program' among non-coaches.



Keeping It Real:

Once a coach is certified, continuing education becomes a priority, and recertification a positive force to build credibility and maintain practice standards for the industry.

Several other trade associations certify training programs, or offer a certification themselves, but their combined share of the market's attention has hovered below six percent for all four years of our survey.

Almost all certification programs require continuing education and recertification, at an interval of 1 to 4 years. The Sherpa Executive Coaching Certification requires annual recertification. Most programs associated with the ICF recertify at the three year mark.

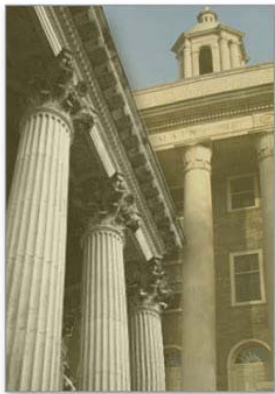
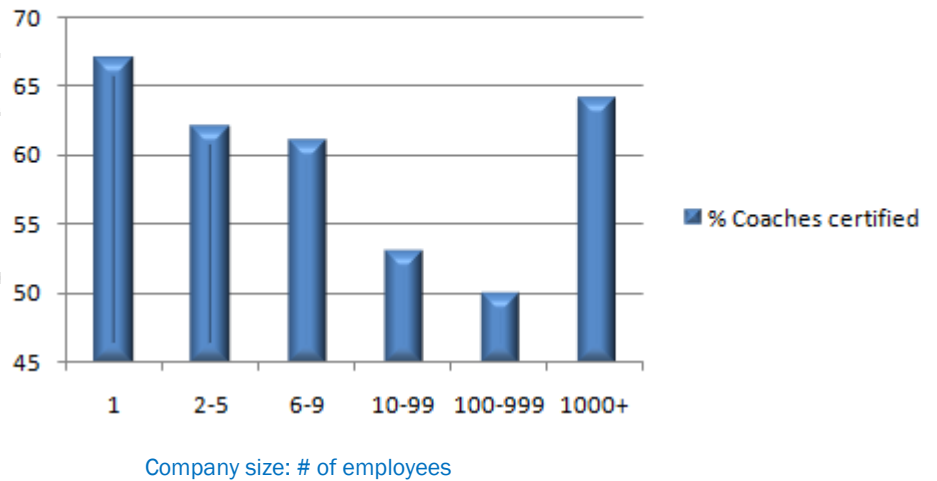
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Who has the credentials?

65% of American executive coaches have at least some formal training in the craft. Nearly nine of ten coaches with coach-specific training are now certified, up from half the pool just three years ago.

In the past, coaches in the largest companies held certifications at a far higher rate than anyone else. Now, the smaller coaching companies have matched them, and the highest rate of certification is among one-person shops.

Percentage of coaches certified, by company size



Training and certification on campus is in its fifth year for the Sherpa program.

Where are the most highly trained coaches? You'll find them in Canada. 85% of Canadian coaches say formal certification is 'very important' or 'absolutely essential', where Americans say so at the rate of 55% to 70%, depending on region.

83% of Canadian coaches cite 'classroom training and certification' as their background. Canadian coaches outstrip American coaches by 25% in this regard. Around 40% of American executive coaches attribute their development as a coach to personal experience, or formal education unrelated to coaching. Only 13% of Canadian coaches say the same.

Education changes the nature of the business: Canadian coaches work with top line executives and senior managers more often than Americans. 89% of Canadian coaches claim earnings at \$150 per hour or more, a higher number than any region in the US.

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How is Coach Training Delivered?

Just like their clients, executive coaches see the value of in-person encounters. Coaches are getting their training in the classroom, rather than opting for distance learning or virtual settings. 63% of our certified executive coaches studied on campus or in the classroom, up from 35% two years back.

Of six major university executive coaching programs in the USA, two appear to be entirely distance learning (Kaplan, UTD) and four are exclusively classroom-based (Georgetown, University of Georgia, Penn State, Texas Christian University)

Women studied in the classroom more often than men. (73% vs. 53%) The number of coaches whose training was primarily on line or by telephone has dropped from 38% to just 6%.



Does Training Make a Difference?

Is there a difference in the business models and experience of coaches with and without formal training? What kind of training helps a career the most?

We have found that coaches with classroom training and certification work with employer-paid engagements more often than other coaches. Fewer than 20% of classroom-certified executive coaches say most of their clients are private pay, while 33% of executive coaches who cited self-study or distance learning work with mostly private-pay clients.

Classroom certified coaches also earn more, with 37% charging \$300 or more per hour, as opposed to 30% of coaches who point to self-study or distance learning. Only 16% of classroom-trained coaches charge under \$150 per hour, as opposed to 38% of self-study and distance learning coaches. Coaches with no formal training in the business at all earn more than distance-taught coaches, but less than those who are classroom certified.

Classroom certified coaches:

- ✓ earn more per hour and per year.
- ✓ get more employer-paid contracts.
- ✓ work in person more often.
- ✓ do more leadership development.
- ✓ coach fewer problem employees.

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The practice of coaching differs by educational background, too. Self-study and distance-taught coaches use the phone and email 59% of the time, compared to less than half the time for coaches of any other background.

Coaches of every background have the same number of clients, as a rule. A coaches' client assignments will be different, though, based on training type. Classroom certified coaches deal with 'leadership development' as a coaching goal more often than other coaches, and they work with clients who 'have a specific problem or challenge' significantly less often.

Does gender determine what route a coach will take for professional development? There's a difference. Men make up 70% of coaches who rely on personal experience, self study and distance learning. Women make up 60% of those certified in the classroom.

The Credibility of Coaching

Based on experience, what do people think about executive coaching? Among HR professionals and coaching clients, 87% see the value of executive coaching as 'somewhat high' or 'very high', a rate that's been steady for three years. Those who rate the credibility of coaching as 'very high' or 'somewhat high' stands at 72%, the same as last year and up seven percent in two years' time.



Coaches from Thailand and Denmark share experience from their coaching practices.

Only one to two percent rate either the value or the credibility of coaching as 'low' or very low'.

The battle for public opinion is about mediocrity: 12% say executive coaching has mediocre value, 26% rank its credibility as mediocre.

Wait.... If coaching is valuable, shouldn't it be equally credible? Actually, you can't expect that. Coaching is not a monolithic field. The field has 20-year veterans who work with the top CEO's in the world, and it has author/educators and major universities working for standards of practice. These practitioners add value and credibility to the industry.

There are also self-styled coaches who enter the field with no credentials, no training and no experience, with varying degrees of success as coaches and marketers. Many last just long enough to leave a bad impression.

Over time, the best executive coaches will be the ones hired. They will create value. They will stick around. Unusual crossovers from other fields will tend to leave the marketplace. That is already happening, and the credibility of executive coaching has started a move that will eventually see perception match reality.

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Survey Methodology

Every year, the Sherpa Executive Coaching Survey gathers information about executive coaching, from coaches and those who hire them. Email invitations go to a worldwide list of practicing coaches, coaching clients, HR professionals, trainers and executives. The survey is offered in English only. (Prior years' versions other languages were largely ignored, even by coaches in France, Spain and Germany, who answered in English.)

Survey sponsors Sherpa Coaching LLC in Cincinnati, the Georgia Center for Continuing Education and the Tandy Center for Executive Leadership at Texas Christian University also invited HR professionals likely to hire coaches.

The survey differentiates between respondent types, and even asks different questions of coaches and non-coaches. When questions involve a subjective multiple choice, respondents are shown the choices in random order.

This year's 1,500 participants nearly tripled the number in the first year's study.
The 2009 level of participation guarantees accuracy of 97.4%.

| | | | | |
|------------------------|--------------|--------------|-------------|-------------|
| - Accuracy - | 2009 | 2008 | 2007 | 2006 |
| Number of participants | 1500 | 1300 | 800 | 550 |
| Margin of error | + / - 2.58 % | + / - 2.78 % | + / - 3.5 % | + / - 4.2 % |

Respondents included, in round numbers:

- 820 executive coaches,
- 350 HR and training professionals,
- 180 life or personal coaches,
- 100 trainers, consultants and others, some using the title 'business coach' or 'career coach'.
- 50 who purchase or use executive coaching services.



275 respondents reported in using the same email address this year as last.

Participants came from the US, Canada and 40 other countries. Most participants told us their location (map):

| | |
|------------------|-----------|
| Argentina | 1 |
| Australia | 23 |
| Bahamas | 1 |
| Bahrain | 1 |
| Belgium | 3 |
| Brazil | 3 |
| Canada | 63 |
| China | 1 |
| Colombia | 1 |
| Denmark | 7 |
| France | 7 |
| Germany | 14 |

| | |
|-------------|---|
| Hong Kong | 1 |
| India | 1 |
| Ireland | 4 |
| Israel | 6 |
| Italy | 9 |
| Japan | 3 |
| Malaysia | 5 |
| Malta | 1 |
| Mexico | 8 |
| Netherlands | 6 |
| New Zealand | 7 |
| Norway | 9 |

| | |
|--------------|---|
| Oman | 1 |
| Panama | 1 |
| Peru | 1 |
| Poland | 2 |
| Portugal | 2 |
| Romania | 1 |
| Russia | 1 |
| Serbia | 1 |
| Singapore | 5 |
| South Africa | 7 |
| Spain | 5 |
| Sri Lanka | 1 |

| | |
|-------------|-------------|
| Sweden | 14 |
| Switzerland | 3 |
| Turkey | 2 |
| UAE | 2 |
| UK | 46 |
| USA | 1102 |

2009 Sherpa Executive Coaching Survey

Of 1,100+ participants from North America, 600+ were executive coaches who told us specifically where they live and work. Here's the regional breakout of North American coaches' responses:

| Location | Count |
|---------------------|-------|
| Canada | 92 |
| USA - Midwestern | 104 |
| USA - Northeast | 156 |
| USA - Northwestern | 49 |
| USA - South Central | 29 |
| USA - Southeast | 88 |
| USA - Southwestern | 95 |

Technology and support:

Again for 2009, IQS Research of Louisville, Kentucky (USA) hosted the survey and validated results. IQS Research flags and discards duplicate responses, based on IP and email addresses. Once data is collected, Sherpa Coaching analyzes the results using software developed specifically for this project.

Data is collected annually between mid- November and mid-December, with publication of results on the following January 15th. Those who respond to the survey receive the results directly by email, the day they are released.

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About IQS Research

Headquartered in Louisville, Kentucky, IQS delivers research on markets, customers, and employees, with studies designed to identify issues and opportunities, and map a path to success. IQS Research collects and analyzes data to provide the information needed for reliable, fact-based decisions that lead to profitable outcomes. IQS Research programs are distinguished by innovation, accuracy and insight.

For customer satisfaction and employee feedback studies, or market profiles, please visit iqsresearch.com/services.htm

For the Center for Healthcare Reimbursement, go to www.center.iqsresearch.com/

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2009 Sherpa Executive Coaching Survey

Survey Sponsors

Sherpa Coaching

in Cincinnati, Ohio, USA, conducts the only executive coaching certification offered by multiple universities. Seven universities have sanctioned the Sherpa curriculum, which is currently offered at Penn State, Texas Christian University and the University of Georgia. In 2005, Sherpa executives Brenda Corbett and Judith Coleman authored *The Sherpa Guide: Process-Driven Executive Coaching*, called “the most detailed coaching process in print.” Training and certification is also offered on site, to internal coaching teams that have included Toyota and US Bank . Certified Sherpa Coaches attend an annual recertification conference for continuing education.



Sherpa’s class: “Coaching Skills for High Performance” is offered on site, or on university campuses, and has attracted high-profile clients which include The Human Genome Institute. Sherpa leadership training is also offered in a DVD series available at www.sherpacoaching.com .

TCU’s Tandy Center for Executive Leadership

at Texas Christian University, Fort Worth, Texas, USA, provides executives with training and development opportunities to help them advance their professional and leadership effectiveness. The Center provides high-level training customized to client needs; consulting services that produce relevant results, and executive coaching to help achieve tactical goals. More information is available at <http://neeley.tcu.edu/default.asp?NodeId=1820> .



The University of Georgia Center for Continuing Education

in Athens, Georgia, USA provides educational programs and services which connect the University with lifelong learners throughout the world. The Center designs, develops and delivers a variety of educational programs to meet the learning needs of a diverse population. With a luxury hotel, restaurants, meeting rooms and banquet facilities, The Center offers a dynamic learning environment for classes, conferences or special events. More information is available at www.georgiacenter.uga.edu .



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