

SURVEY REPORT

THE GIBS COACHING LANDSCAPE REPORT

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of Business Science**

University of Pretoria

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1. Executive summary

Many emerging trends have been accelerated in 2020, as COVID-19 has forced individuals to rethink the way they work, relate, and lead. An increase in digital adoption means that organisations can continue to connect during lockdown. However, the type of connection is largely dependent on the organisational culture. As many workers migrate to home offices, there is the risk of task-orientated output that neglects team collaboration, traditional brainstorming, and notes of empathy and encouragement around the water cooler.

With astute awareness, leaders need to ensure that there is no 'relapse' into the old (although sometimes still prolific) managerial paradigm of 'command and control'. The rise of the Fourth Industrial Revolution encourages humans to tap into their infinite potential, sparking creativity and critical thinking. Our future does not rely on us competing with technology, but rather reclaiming the unique qualities – empathy, imagination, design, critique – that make us human.

Given this contrasting context – where pandemic meets human passion – GIBS is proud to launch the first South African Coaching Landscape Report. This report reviews coaching, specifically in South Africa, from three unique perspectives: coaches, coachees, and buyers of coaching. It uses respondents' insights and language to present South Africa's first integrated definition of coaching. It identifies key reasons for coaching, as well as some of the barriers. It explores ways to personalise and customise coaching interventions so that they best meet the needs of the individual and the organisation. Furthermore, it presents three key trends in coaching that would be important for all coach stakeholders to carefully consider as we navigate the future of work.

As Africa's leading business school, GIBS is proud to offer a comprehensive and practical report on leveraging coaching during a crisis as well as during 'business as usual', with the keen insight that coaching will be instrumental in the curation of human-centric leadership.



The business of being human

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www.gibs.co.za/coaching

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2. Introduction

What does a day in your life look like? As a leader in the 21st century, you find yourself in the depths of a digital revolution. You rediscover the advantages of your human creativity and thinking capacity. However, with prolific uncertainty and increasing demands, finding time to think and focus is not always easy.

Business coaching was developed to support both leaders and organisations to thrive in complex environments. The recognition is that, with time to think and a partner to your ambitions, you are more likely to succeed. Business coaching is about training the muscle of 'learning to learn' or 'learning to shift'. This makes individuals more agile, which is critical in our current context of constant change. Finally, it is about the nexus of personal and organisational goals. In business coaching, success is amplified when these two goals intersect.

Since its inception in 2000, GIBS has differentiated itself by being intentional in developing leaders across Africa. Coaching is a key part of this, and GIBS's centre, Coaching@GIBS, is dedicated to coaching. The old managerial paradigm of command and control is no longer effective. To have an impact, we need to enable and unleash the full potential of our people. Coaching competence within an organisation means managers can confidently apply coaching skills to get the very best out of people. Coaching has also been identified as a key leadership tool in developing future-fit leaders.

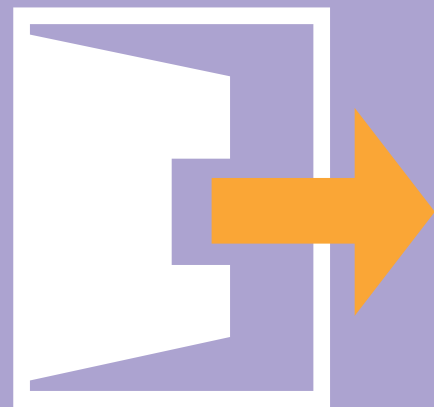
This research, as part of Coaching@GIBS, was initiated to ensure the relevant application of coaching in African business. As market leaders, Coaching@GIBS is ever-challenging its coaching programmes and offerings. We strive for a globally competitive and human-centric approach that is relevant to our African context. Former GIBS dean, Prof. Nicola Kleyn, says:

"As we travel a journey of global change, acquiring knowledge and skills is no longer enough for learners of today. Coaching creates the ultimate opportunity to work on building a bridge between who we are and what we want for ourselves in future."

Coaching@GIBS applied a holistic approach, combining three surveys to create **The GIBS Coaching Landscape Report**. This is a first for the South African market, who previously relied on international data to understand business coaching, or conducted surveys with primarily one stakeholder group.

THE THREE SURVEYS WERE:

- **the coach survey, which gathered coaches' perceptions;**
- **the coachee survey, which looked at the recipients of coaching; and**
- **the buyers or decision-makers of coaching services in an organisation.**



The research was launched in 2019. Invitations to participate in the survey were sent to the International Coach Federation (ICF), Coaches and Mentors of South Africa (COMENSA), Knowledge Resources, organisations with an active and growing coaching culture, and GIBS's Professional Associates. The following groups completed the online survey:

- **98 coaches;**
- **42 coachees; and**
- **20 buyers of coaching services.**

While Coaching@GIBS commissioned this research, it must be noted that the data gathered is not a GIBS view. It is an independent view of the respondents at a moment in time. However, we have applied our own views in the exploration of what the surveys reveal. Of course, change is inevitable. **And so, Coaching@GIBS is committed to reviewing this data regularly to harvest key trends and drive innovation in coaching.** With this in mind, and in the spirit of coaching, we welcome your freshest thinking as you digest this report, and hope that you will journey with us over time across South Africa's coaching landscape.

Continue the conversation at coaching@GIBS.co.za; and find the individual survey results at <https://www.gibs.co.za/coaching/pages/coaching-resources.aspx>

Coach survey – respondents at a glance



GENDER

Of the respondents who partook in the coach survey, 68% were female and 32% were male. This is consistent with the worldwide trend where 60–70% of coaches are female.

AGE

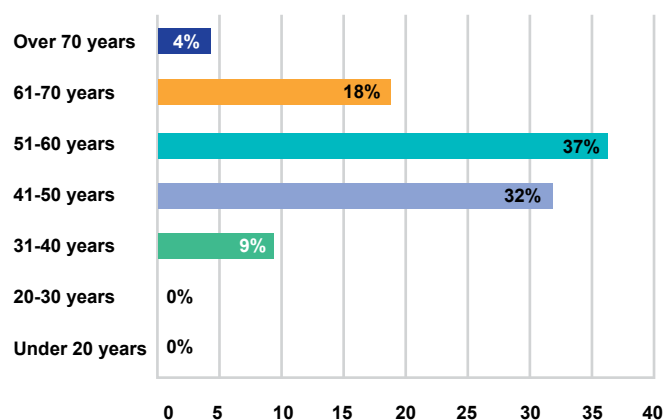


Figure 1: Age

South Africa is biased towards an older coach community, compared to the global norm of 30–60 years. This may be because coaching is considered a second career for many South Africans. GIBS's market research, which was conducted by the Carnelley Rangecroft Consultancy in 2020, reveals that executives are biased towards older, more experienced coaches. 'It's lonely at the top' is frequent feedback from clients, illustrating their desire for somebody who has similar executive experience.

RACE

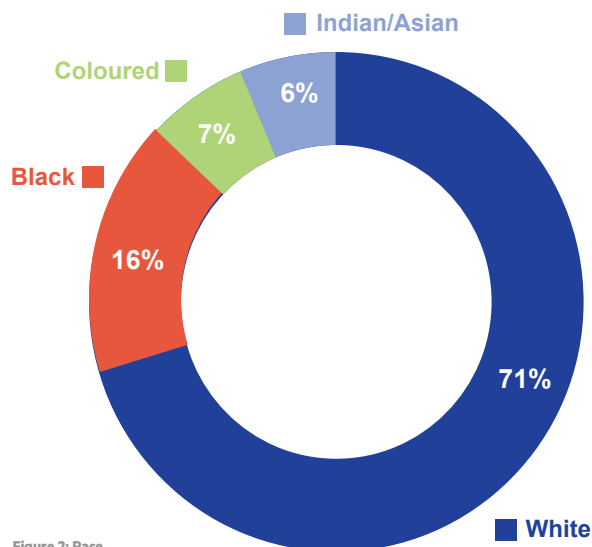


Figure 2: Race

The responding coach audience on this survey does not align with the country's demographics. If this is representative of the national statistics (it may not be), then training organizations and coach bodies need to ask the important question: 'How can we make the South African coach industry more representative?' Diversity is an important factor for many organisations building their coach capacity both internally and with external vendors.

EXPERIENCE

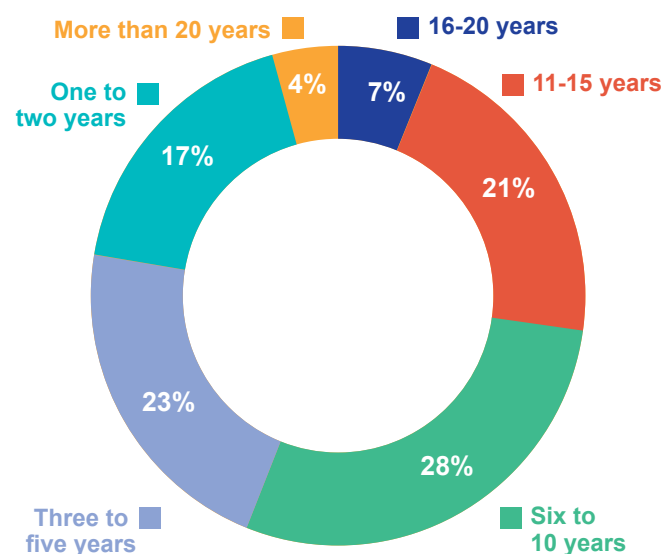


Figure 3: Experience

The marketplace needs to be encouraged to appreciate both experienced and newly qualified coaches. The quality of coach education and training is consistently improving, benefiting newly trained coaches, who often come with contagious passion and fresh perspectives. More experienced coaches may bring a practical application grounded in experience as a coach and a business person. Certainly, the right experience should contribute significantly to further mastery of coaching as a skill. Later, we will discuss rapport (or chemistry) in the coach partnership. This is one of the more important considerations when selecting a coach.

COACH QUALIFICATIONS

Most respondents had several coaching qualifications or training experiences. A typical individual response listed approximately five courses. Unsurprisingly, there was a diverse list of programmes, from recognisable accredited programmes to short courses and workshops. There is no single accepted standard for training requirements in South Africa. There is also strong motivation for continued professional coach training. Moreover, there are various approaches to coaching, influenced by learning, psychology and leadership theories. The impetus for ongoing coach learning is explored in more detail later.



Coachee survey

– respondents at a glance

In this case, the coachee profile reflects a South African executive. Coachee profiles are often industry-specific. If research was conducted per industry, variations would exist.

GENDER

Fifty-seven per cent of the coachees who took part in the survey were female, while 43% were male.

AGE

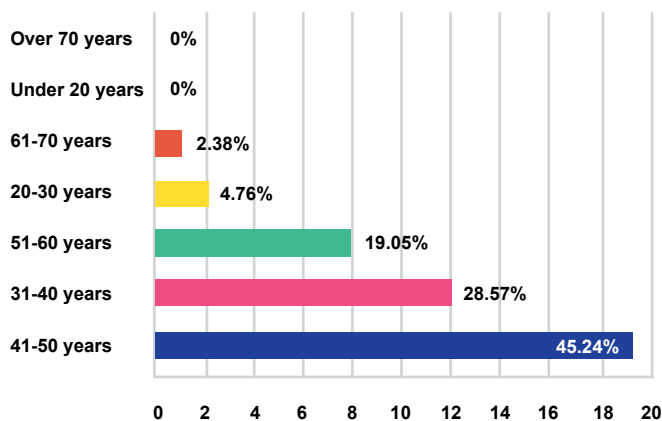


Figure 4: Age

Given the rise of executive coaching, it is not surprising that the majority of coachees are aged 41–50 years old. There is an opportunity to increase coaching amongst graduates and young talent as well as use coaching to facilitate dialogue across generations. Group/team coaching is another opportunity to democratise coaching within organisations.

RACE

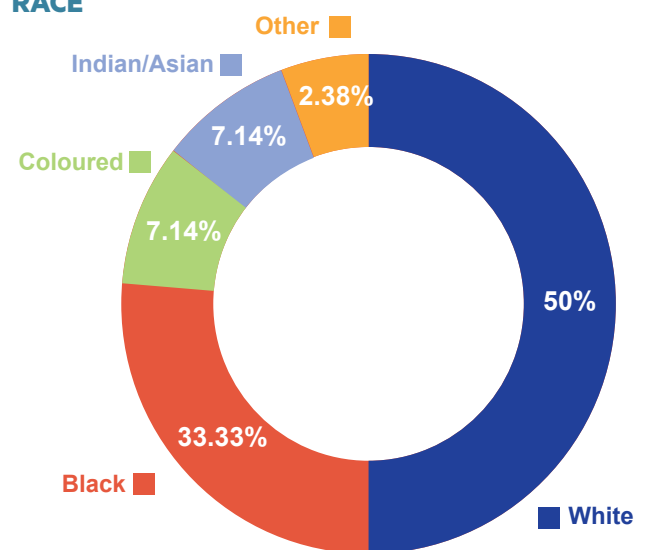


Figure 5: Race

The responding coachee group on this survey also does not align with the country's demographics. If this is representative of the national statistics (it may not be), organisations need to ask the important question: 'How can we make coaching as a development tool more representative/ inclusive?'

INDUSTRIES

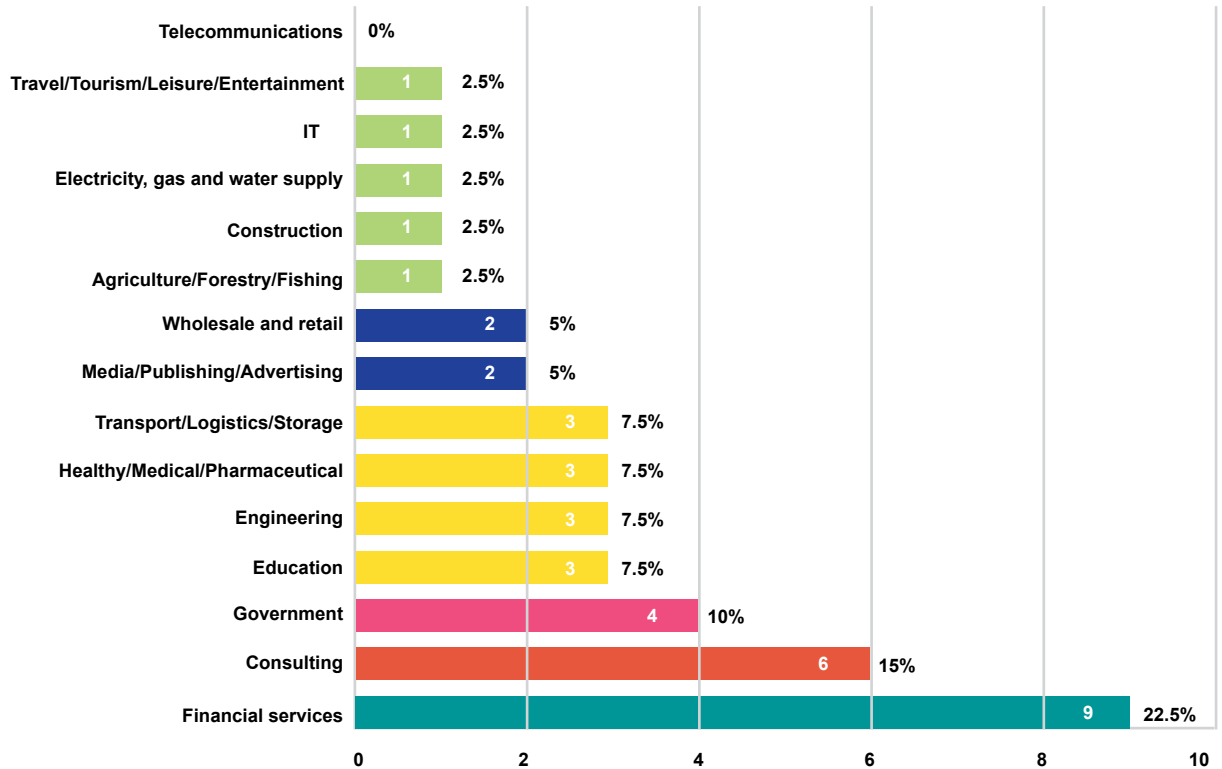


Figure 6: Organisation industry/sector

The majority of these coachee respondents are employed in the financial services sector. Surprisingly, there are few to no respondents in IT and telecommunications. This is not aligned with global trends and probably reflects more about the respondents who chose to complete this specific survey than about actual industry uptake of coaching. We know that, globally, IT and telecommunications invest heavily in coaching. For example, Silicon Valley's star performers boast the use of coaching in their organisations. There is also an opportunity for entrepreneurs to leverage coaching to refine business strategies, empower young leadership, and transform big dreams into tangible outcomes.

ROLES

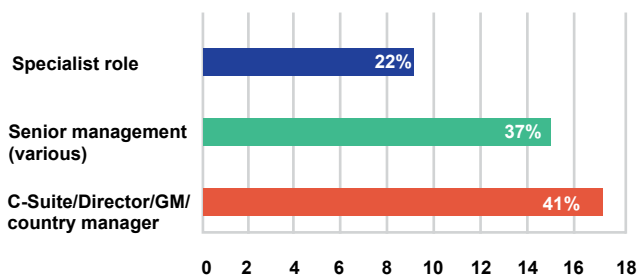


Figure 7: Roles

Of the respondents who participated in the survey, 41% were C-suite/general managers/country managers, 37% described themselves as senior managers, and 22% described themselves as specialists.

No respondents defined themselves as young talent. Given its (perceived) cost, coaching is often reserved for senior and executive management. Again, group/team coaching offers an opportunity to scale the impact of coaching in organisations. We are seeing an ever-expanding need for managers to have coaching skills as part of their leadership repertoire. This is another way to weave coaching into an organisation. In fact, the Fourth and Fifth Industrial Revolutions demand that leaders display human-centric skills to remain relevant and impactful. It is becoming increasingly important to develop talent early, to enable employee's full potential, and to create thinking and learning organisations. This will be discussed more later on in this report.



Buyers of coaching survey – respondents at a glance

INDUSTRY

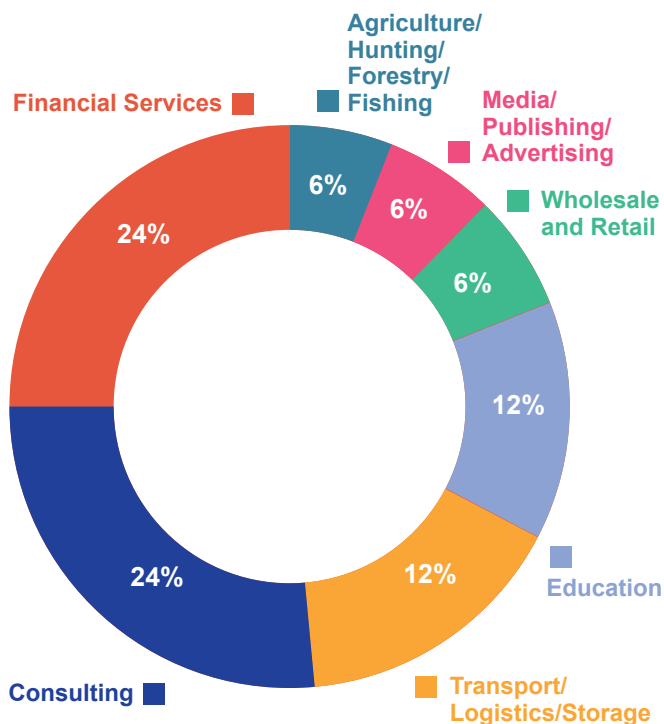


Figure 8: Industry

Unsurprisingly, the majority of buyers are in the same industries as the coachees.

NUMBER OF EMPLOYEES IN A COMPANY

Interestingly, 55% of companies have less than 500 employees, which is encouraging as it shows coaching is not reserved for multinationals and large corporations. There are many successful case studies of coaching being used to build smaller businesses and support start-ups. Thirty per cent of companies had between 500 and 5 000 employees. The revenue of companies was fairly evenly split.

ROLE OF INDIVIDUAL COMPLETING SURVEY

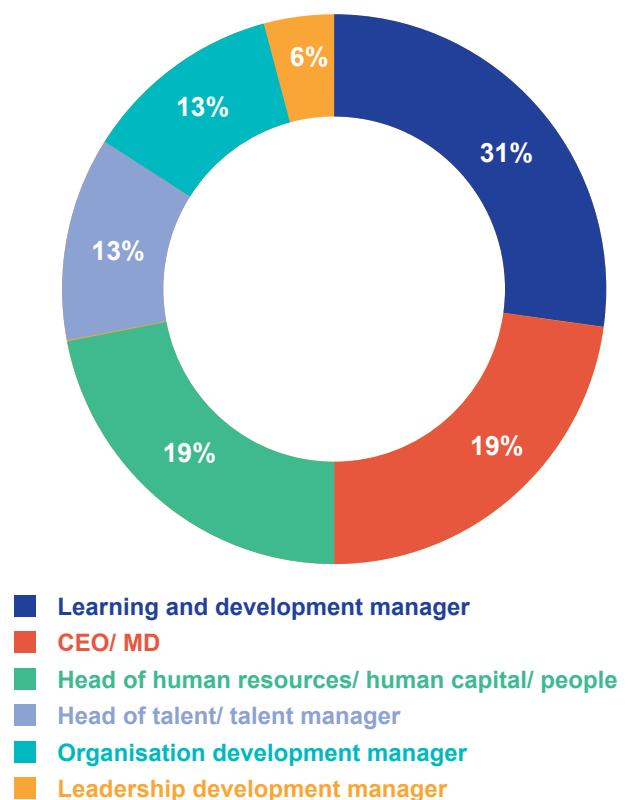


Figure 9: Roles

Given the link between coaching and learning, it is not surprising that learning and development managers mainly lead the coaching agenda within organisations. However, the process is often supported by important stakeholders, such as the chief executive officer (CEO) or human resources (HR). Senior executive coach sponsorship is a powerful way to support the application and embedding of coaching within an organisation.



3. Understanding of coaching – shared definition

A first for South Africa! All respondents' (coach, coachee, and buyer) definitions were consolidated to create the first comprehensive and integrated definition of business coaching, as applied in a South African business context.

Your ambition and ability to be a better leader will impact the success of your team. Therefore, it is unsurprising that coaching is universally recognised as a growth and performance enhancer. However, the definition changes slightly, depending on the role of the respondent (see Table 1). Coaches appropriately offer a very detailed definition, while the buyers of coaching tend to focus primarily on its relevance within a work context. Coachees understand that there is professional and personal impact with coaching. All respondents understand that coaching is a **process within a context for an outcome and purpose**. There was collective understanding that the process is collaborative and facilitates deeper thinking. It is recognised that coaching will impact personal and work goals. Personal growth, learning, career management, and work performance are identified as the purposes of coaching.

FROM THE GROUND UP: INTEGRATED DEFINITION OF COACHING BASED ON THE GIBS COACHING LANDSCAPE RESEARCH

Coaching is a collaborative, client-centred process. It is based on an egalitarian, helping, and trusting relationship. The coach creates a safe space to facilitate a thinking and reflecting process aimed at assisting in decision-making. This is done by listening attentively, asking questions, sharing knowledge, and supporting and challenging in a non-judgemental and affirming manner. The intention is to achieve an individual's goals, enhance his/her sense of well-being and resilience, and achieve learning and personal growth. All of this leads to decisions and actions that add meaning to the individual's life. The coaching takes place within the context of an individual's personal and work life as well as within the context of the organisation's goals. In this case, organisational goals include growing managers and leaders, and increasing workplace effectiveness. The purpose of coaching is personal growth and learning as well as managing change, transitions, and performance.

IN SUMMARY

Coaching is a collaborative, client-centred process through a trusting relationship. It is based on listening, questioning, supporting, and challenging in the holistic context of an individual's personal and work life. This process facilitates thinking and reflecting for decisions, actions, and learning. As a result, individual and organisational goals are achieved. Coaching also enhances personal and professional meaning and purpose.

Relevant part of definition	COACH	COACHEE	CLIENT/BUYER
The coaching process	Coaching is a collaborative , client-centred process 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 , and supporting and challenging in a non-judgemental way and affirming manner .	Coaching is a shared, collaborative relationship that assists and guides the coachee through a thinking process using questions, support , and by providing a sounding board .	Coaching is a collaborative , thinking partnership in a safe space in which the coach assists the coachee to make decisions . This is done through an egalitarian helping relationship , which supports individual learning, as well as the finding of solutions and solving of problems in a systemic manner .
The coaching goals/outcome	To achieve the clients' goals , enhance their sense of well-being and resilience , and achieve learning and personal growth , which lead to decisions and actions that add meaning to their lives .	To achieve the client's goals .	The outcome will be career development, team development, and performance enhancement . This will be balanced with personal growth .
The context in which the coaching takes place	The coaching takes place within the context of the individual's personal and work life , and the broader societal impacts on their lives .	The coaching takes place within the context of the individual's personal and work life .	The coaching takes place within the context of the organisational strategy, workplace effectiveness, and growing managers and leaders .
The purpose of coaching	The purpose of coaching is growth, learning , managing change and performance	The purpose of coaching is personal growth and performance in the workplace as well as managing change and transition.	The purpose of coaching is personal growth, learning, managing careers and performance , as well as unlocking personal potential .

Table 1: Comparison of definition/understanding of coaching by coach, coachee, and buyer of coaching

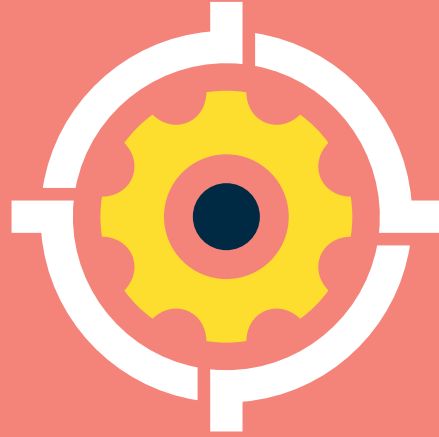
Text bold in blue: common terms across groups

Text bold in grey: differences in terms across groups.

If we compare this to definitions by professional coaching bodies, there are common references to ‘partnering’, ‘collaboration’, ‘learning’, ‘goals’, and ‘personal and professional’ contexts. This suggests a general awareness of what coaching is amongst coachees and buyers. In our view, this is a growing awareness.

ICF and COMENSA definitions include more **qualitative** terms around the coaching process and profession (e.g., ‘thought-provoking’, ‘creative’, ‘inspiring’, with outcomes like ‘self-awareness’, and ‘potential’). The Worldwide Association of Business Coaches sets standards for **business** coaching and so emphasises the context and content of the coaching being about business, which is more aligned with the buyers’ definitions of coaching. All of this is appropriate, as it aligns with the overarching objective of the coaching, depending on your position.

For the coach and coachee, there are intangible yet profound shifts, such as confidence and self-awareness. Being a confident and self-aware leader will inevitably impact your performance in the workplace. Organisational impact is the by-product of a successful personal coaching intervention. Buyers are often tasked with proving return on investment (ROI) of their purchase, and appropriately prioritise the organisational impact and results over individual benefits, though they do recognise the value of both.



4. Understanding of mentoring – shared definition

Perhaps predictable, mentoring was a far simpler term to define (see Table 2). Business is familiar with mentoring. However, it too has evolved from the position of sage and subject to one of mutual exchange, questioning, and provocation. With this in mind, the integrated definition may evolve over time as coaching competencies, such as open-ended questions and deep listening, continue to influence the mentorship relationship. Until then, respondents share the philosophy that mentorship is about an expert guiding a less experienced person.

INTEGRATED DEFINITION OF MENTORING BASED ON THE GIBS COACHING LANDSCAPE RESEARCH

Mentoring is a process in which a more experienced person with subject matter or industry-specific knowledge uses his/her knowledge and expertise to guide and advise the less experienced mentee/protégé. The purpose is to develop and upskill the mentee/protégé in his/her work role and professional capacity.

DEFINITION OF MENTORING (BASED ON COACH 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.

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

Mentoring is a relationship between a subject matter specialist and a person looking for advice and guidance as well as networking opportunities. The purpose is to develop and a grow a person in their professional capacity.

DEFINITION OF MENTORING (BASED ON CLIENT/BUYER RESPONDENTS' CONSOLIDATED RESPONSES)

Mentoring is a process whereby a more experienced or knowledgeable person transmits his/her knowledge or experience to a more junior/less experienced member of the organisation in order to develop role-specific competence.

Table 2: Definitions of mentoring from each survey



5. Reasons for coaching

While the order may have varied, the three most important reasons listed for coaching were **personal development, career development, and leadership development** (see Table 3). Buyers prioritise leadership development, given its influence on business success. However, personal impact was recognised, too. The reverse is true from a coachee's perspective. As coaches, it is important to consider how they pitch their request or offer of coaching based on these preferences. For example, personal development is inclusive of (and certainly a very critical part of) leadership development. How can coaches best land this message amongst coachees and buyers to support buy-in?

It is particularly important for coaches to acknowledge that their coaching service is not necessarily used for coaching sake on its own, but that coaching is almost always used to serve a broader organisational strategy. This could be leadership development, talent development, transformation, change, or another strategy. Coaches should demonstrate how they can add value to that strategy, with its underpinning commercial and non-commercial objectives.

Career was another strong motivator for coaching across respondents. In terms of career development, from the buyers' perspectives, there were two components equally represented. The first was preparing people for promotion – that is, identifying talent and coaching them in anticipation of a promotion. The second was supporting individuals to transition into a new role/promotion.

Buyers may be motivated by organisational objectives. However, they should not disregard personal levers as a powerful way

of gaining coachee buy-in. This is increasingly important as we move through the Fourth and Fifth Industrial Revolutions, where human-centric skills like creativity, critical thinking and emotional intelligence become key leadership differentiators. It is worth emphasising the personal (well-being, resilience, balance), professional (advancement, learning), and organisational benefits of coaching.

It is also important to consider the barriers to coaching, especially in position of coach or buyer. These may include, but are not limited to:

- **Budget constraints.**
- **Time constraints: Executives may find it difficult to safeguard time for consistent coach sessions, with potential negative impact on the coaching experience. The critical question to both money and time constraints is: 'What is the cost of not using coaching?'**
- **Lack of rapport between coach and coachee.**
- **No or unclear measures of success at the start of the coaching engagement, making ROI difficult to prove at the end.**

Identifying and understanding the barriers to coaching may support coaches' approach to requesting or selling coaching to an organisation.

REASONS FOR COACHING

COACHES	COACHEES	BUYERS
Personal development (54%)	Personal development (27%)	Leadership development (55%)
Career coaching (53%)	Part of a programme (27%)	Career development (50%)
Leadership development (30%)	Career transition (22%)	Personal development (15%)
Strategic thinking space (21%)	Leadership development (16%)	

Please note data was drawn from open-ended questions and respondents could list several factors and, as such, the percentages need not add up to 100%. Only those with more than 15% of respondents selecting items are listed.

Table 3: Reasons for coaching from each survey

6. What does coaching look like (sessions and types)?

In the definition of coaching (GIBS integrated definition above), coaching is referred to as a ‘collaborative, client-centred approach that takes place **within the context of the individual’s personal and work life** as well as **within the context of the organisation’s goals**’. Therefore, **professional and personal context is very important**. Coaching is a **personalised** experience. It is based on very specific goals at a moment in time, and these goals are influenced by personal and organisational factors.

Context will change the coaching experience. For example, a coach may be required to stretch the creativity of the people in a very stable, innovative, and well-performing organisation. Then, the same organisation may suddenly go through a great deal of turmoil, possibly a merger or restructuring, changing the organisational context, which impacts goals from creativity to managing uncertainty and resilience. Coaching in this context is more about navigating change, building adaptive capacity, and leveraging opportunities that come from uncertainty. This change in coach requirements is what we are seeing in the current COVID-19 pandemic.

We know that change is inevitable. **The flexibility of the coach in responding to change, whether at the personal or professional level, is imperative. Coaching is ultimately about ‘learning how to learn’ or building the muscle of agility/ adaptive capacity.** It adds significant value to an organisation when it focuses on an individual’s ability to change, learn, and grow. Our ability to adapt is vital for sustained competitiveness and preparation for the future. Consequently, coaching is not just about micro goals – that is, individual and organisational goals at a moment in time. Successful coaching also depends on a coach’s ability to hold the macro context across time – that is, humans’ ability to change, learn and grow.

The personalisation of coaching does not only happen in session. Logistical factors influence, this too. These factors include but are not limited to:

- **Sessions, frequency, and duration of coaching;**
- **Rates; and**
- **Selection of coaches.**



6.1 Number of sessions, duration of sessions, and frequency of sessions

Coaching sessions must be fit to purpose. There are no absolutes in terms of number, duration, and frequency of sessions across the different surveys (see Table 4). **The objectives of the individual and the organisation must drive these factors.** This offers opportunity for personalisation and customisation.

Instead of viewing coaching as an hourly service, you may want to consider an outcome-based approach, where the coach is paid to achieve an objective. World-renowned coach, Marshall Goldsmith, does this. However, it is possible that coaching for (only) tangible concrete results (e.g., an increase in sales) could inadvertently diminish the value of non-tangible results (e.g., accumulating insights or developing capability to ‘learn how to learn’). Again, this highlights the need to adjust coaching to purpose and remain flexible.

Successfully operating in a volatile, uncertain, complex and ambiguous (VUCA) environment is critical for all industries, and coaching is no exception. As a coach, your clients’ contexts are constantly shifting. If coaching is truly a personalised solution, then personalised timing options should be applied. **This means less rigidity from corporates and more flexibility from coaches.** Consider then offering coach hours as opposed to sessions – for example, **15 hours** of coaching to be used over six to 12 months. This way, during a particularly challenging time, sessions may be longer and more frequent. Alternatively, if an individual is under intense pressure at work, it may be appropriate to postpone a project-based coaching session.

On-demand coaching and specialist coaching are also flexible options to consider. Coachees (especially executives) may well find it more valuable to pull on coaching in real-time. For example, a leader may want a quick 15-minute ‘sense-making’ conversation prior to having to make a complex decision. Coaches may also have areas of subject matter expertise or experience that a coachee or buyer would like to utilise. There is no reason why hybrid models of ‘guiding/input’ with ‘facilitating/coaching’ cannot be used effectively if the interchange is made explicit.

	COACHES	COACHEES	BUYERS
Frequency of sessions	64% selected monthly	64% selected monthly	Not provided for Buyers
Duration of each session: 60–120 minutes	32%	48%	37%
Duration of each session: 30–60 minutes	48%	45%	42%
Number of sessions	Too much variation to determine exact number – 66% between six to 12 sessions	Great variation – unable to categorise	<ul style="list-style-type: none"> • Three to six sessions: 20% • Six to eight sessions: 25% • Eight to 10 sessions: 20% • 10 to 12 sessions: 25%

Table 4: Some key extracts about number of sessions, duration of sessions and frequency of sessions (full data available in the individual surveys)

6.2 Rates

The coach's rate/fee is an opportunity for customisation. The rate offerings are complex and many coaches offer a variety of tiers in different circumstances – for example, junior managers at one rate, executives at another rate, or rates for non-profit organisations. Factors that may impact rates include, but are not limited to:

- **the coach's experience and qualifications (e.g., 10 years' experience and a master's degree in coaching might differ in rate from a person with a short training programme and very little experience in coaching);**
- **coaching as part of a package inclusive of other services (e.g., coaching offered as part of a broader leadership development or consulting project);**
- **executive coaching is often more expensive, given that it might require an advanced coaching skillset; and**
- **third-party consultancy or business – many coaches work for these companies that then market, design and engage clients, and sell their services for them. Usually there is a margin on this service.**

According to the coach survey results, a summary of comparative rates by ranges is listed below.

INDIVIDUAL COACHING:

- **Life coaching:**
R450 to R1 125 per hour
- **Junior management coaching:**
R275 to R3 000 per hour
- **Middle management coaching:**
R650 to R3 000 per hour
- **Executive coaching:**
R750 to R4 500 per hour
- **Buyers rate for individual coaching:**
R300 to R 5000 per hour (uncategorised)

GROUP/TEAM COACHING:

- **Group coaching:**
R300 to R5 000 per hour
- **Team coaching:**
R1 500 to R7 000 per hour
- **Buyers rate for group/team coaching:**
R3 000 to R5 000 per hour

While the price ranges may appear to be large and inconclusive, they are unsurprising given the factors listed above.

Sixty per cent of buyers did not answer this question. GIBS has found that buyers and coaches tend to be reserved when sharing rates. However, we know that more expensive rates are usually associated with extremely qualified, experienced, and astute coaches. Knowing both the tangible and intangible value of having a highly experienced coach should be understood and communicated at individual and organisation levels.

The South African coach market may be significantly undervalued. In the US, for example, the average hourly rate is anywhere between \$400 and \$600. This is a key consideration for international coach sessions. It is generally recommended that coaches are remunerated for their level of expertise and experience. It is also important to consider the expected investment outside of the actual coaching sessions (e.g., 'on-demand' coaching or 'preparing a 360-degree feedback process').

6.3 Coach selection criteria

COACHEES	BUYERS
Rapport (50%)	Professional body (70%)
Experience (38%)	Training qualifications (60%)
Qualifications (30%)	Experience (60%)

Please note data was drawn from open-ended questions and respondents could list several factors and, as such, the percentages need not add up to 100%.

Table 5: Criteria when choosing a coach

The third area of personalisation is in the selection of the coach. We all like choice. Where possible, involve the coachee in this selection by offering a shortlist of two or three coaches, which helps facilitate upfront coachee engagement. It is often helpful for coachees to complete a **pre-coaching matching form**. Questions may include demographic preferences, as well as more reflective questions like:

- **What is your greatest achievement to date?**
- **What have been some of your most significant obstacles in achieving your career goals?**
- **Who is your key support at work and at home?**
- **What do you expect from your coach?**

By completing these questions, the coachee begins clarifying objectives. The person responsible for the final coach-coachee matching can use these answers to ensure the personalisation of the selection. For example, 'I am so overwhelmed – I need practical skills to manage my time' means looking for a coach who is able to provide relevant input or techniques. Or 'I have a big decision to make between two different roles' means prioritising a coach who challenges people to think deeply about purpose. We would suggest that while limiting the number of coach options is useful, actual matching to one specific coach is not an exact science. The final choice is best made by the coachee. Do not underestimate the power of intuition in guiding coachees to select their own coaches.

The buyer of coaching may also want prospective coaches to complete a **pre-coaching form**. Questions can align to buyer and coachee criteria (see Table 5). For example, on coach credentialing, you may consider questions like:

- **Are you a member of a professional body for coaches?**
- **If yes, which body are you a member of?**
- **How long have you been a member of this body?**

- **Are you credentialed with a professional body?**
- **If yes, what is your level of credential?**
- **How long have you had this credential?**

A NOTE ON PROFESSIONAL COACH BODIES

Buyers and coachees differ on one aspect when selecting a coach. Buyers prioritise coaches who belong to professional bodies, while coachees rate rapport as being more important. Both buyers and coachees value qualifications and experience. This desire for professional coaches must be balanced with the need for rapport between the coach and the coachee. Alternative words used to describe rapport include resonant, attuned, connected, and clicking. Doug Silsbee (2008), one of the early writers in coaching, used 'resonance' to define the connection with each other. He described it as 'an unspoken felt connection, in which both people know there is mutual understanding' (Silsbee, 2008, p. 119). In his book *Attuned leadership: African humanism as a compass*, Reuel Khoza (2012) describes 'attuned' as connection, compassion, integrity, humility, and reasonableness. While Khoza (2012) is writing about leaders and not coaches, this intangible yet very present feeling of connection is a key component in a coaching relationship from the coachee's perspective.

Of course, resonance is hard to gauge before a coachee has experienced the coach. This may be one reason why credentials and accreditations are valued- the assumption being that a credentialing body has assessed for competency, including ability to create rapport. Coachee's, however, should also be empowered to gauge both competencies and rapport, in their coach. They can ask themselves questions like: "is my coach doing more telling/ talking than I am? Is the coaching contracting process and the envisaged outcome clear and acceptable? Does a coach project too much of his/her personal views in this coaching partnership? Do I feel both safe and challenged?"

Coaching@GIBS independent market research conducted by Carnelley Rangecroft Consultancy in 2020 supports the importance of credentialed coaches. Given the recent influx of

coaches, these bodies help to regulate the industry and serve as quality control. Business coaching is also different, given its goal orientation and strong emphasis on action and accountability. Being part of a professional body suggests that you, as a coach, understand the business coaching model.

There are times when a coach cannot be chosen. For example, when coaching is part of a group process of a leadership development programme, or when there is only one coach employed by the organisation. Coaches are skilled to work with any person. However, **given the importance of resonance from the coachees' perspective, allowing the coachees to choose their coaches may be a prudent choice. If a coach is preselected or placed, increase coachee buy-in by emphasising the coach's credentials and experience, as well as the empowered position of the coachee in directing the coaching engagement.**

The link to a professional body and resonance need not be an either/or situation. Buyers of coaching services could screen coaches against a list based on their policy and objectives for coaching, and then from that list, allow the coachees to choose their coaches. The GIBS coach survey discusses matching processes between coach and coachee. In this survey, 68% of coaches belonged to the ICF and/or COMENSA. There is a difference between membership and being credentialed. A credential provides an official recognition that the person is able to coach at a particular level against a set of competencies (and has been formally assessed against those competencies). Membership most often simply relies on paying a membership fee, and is not filtered or credentialed. Each level also requires a set number of coaching hours. The table below demonstrates this difference. Given the robust requirements, many members do not necessarily pursue a credential.



Coach supervision is becoming increasingly important as part of credentialing. Even if the programme is not accredited, it should offer a significant number of training hours (above 60 hours) as well as balance theory with practical application, live feedback, and critical reflection.

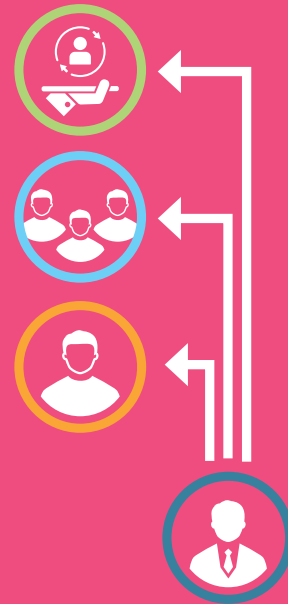
It is also useful to note that **there are many approaches to coaching**. A coach may choose to specialise in a specific approach or use a blend of approaches in their coaching process. Examples of coaching approaches include:

- **Narrative coaching**
- **Gestalt coaching**
- **Integral coaching**
- **Brain-based coaching**
- **Ontological coaching**
- **Systemic coaching**

	Members in South Africa	Registered members	Level 1 accreditation	Level 2 accreditation	Level 3 accreditation
COMENSA	943 members + 242 student members	166	29 – CCP – Credentialed Coach Practitioner	13 – SCP Senior Credentialed Coach Practitioner	22 – MCP Master Credentialed Coach Practitioner
ICF	408	No level	38 – ACC Associate Certified Coach	127 – PCC Professional Certified Coach	12 – MCC Master Certified Coach

Table 5: Data provided by ICF and COMENSA reflect current membership and credentialing
Source: ICF (2019)

Some coach training will focus on a specific approach, with the expectation that students master this approach. Others, including GIBS, choose to focus on a context (for GIBS, the context is business coaching), rather than one methodology. In GIBS's case, training and application is in a variety of approaches, allowing the coaches to either select their preferred way of coaching or apply an appropriate blend. The GIBS orientation is also based on adult learning and change as a knowledge base.



7. Trends in coaching

Given growth to date, we can confidently predict that coaching will continue to rise in popularity and demand. This does not only apply to stand-alone coaching services, as organisations are increasingly recognising the advantages of upskilling managers with coaching skills. **Open communication, active listening, deep questioning, empathy, exploring options, and actively managing accountability are key characteristics of a coaching engagement.** As we venture further into our new world, driven predominantly by technology, uncertainty and change, these traits have proven invaluable in leading successful teams.

Today's workplace offers many opportunities for coaching exchanges. Consider your week. Have you had to make a bold decision? How have you communicated a revised strategy? Have you had a difficult conversation with a colleague? How did you facilitate your team meeting? How did you galvanise support for your latest idea? Do you need fresh thinking for new solutions? How are you balancing working from home with family demands? How are you critically sifting through abundant and paradoxical information to make confident decisions?

Coaching enhances the thinking process and outcomes of these familiar moments in business. In addition to leader as coach, our survey emphasised three trends, which coaches and buyers should focus on over the next five years – namely **internal/external coaching capability, group/team coaching, and virtual coaching.**

7.1 Internal/External coaching capability

Currently, 33% of organisations/buyers/decision-makers who completed the survey are using internal coaches for individual coaching. The same respondents believe this figure will increase to 80% in the next five years. They do not see a drop in external coaching, believing that this will also increase by 72%.

GIBS market research conducted by Carnelley Rangelcroft Consultancy in 2020 found value in external coaches. Key benefits of external coaches include objectivity, fresh thinking, and psychological safety (given their distance from internal politics). However, the value of internal coaches was also noted, given their deep knowledge of the business and organisational culture. Interestingly, the research emphasised the value of optimal partnering between internal and external coaching, as they both are able to offer valuable benefits. As a result, it is not surprising that we anticipate a growth in internal and external coaches.

A key consideration is how internal coaches will be trained/educated? Will they hold additional responsibilities or be a full-time internal coach? How will confidentiality be managed? Its worth noting that the conflicts in interest and possible conflicts in role, may make acting as an internal coach difficult. While we believe that its increasingly critical that managers are trained with coaching skills, we also caution that asking someone to be a more formal internal coach to their colleagues carries great responsibilities and requires maturity around matters of confidentiality and systemic complexity (including politics, power, rank and status). The GIBS guide, 'How to implement effective coaching processes within your organisation', provides a framework on how to consider these variables. This guide can be found at <https://www.gibs.co.za/coaching/pages/coaching-resources.aspx>

7.2 Group/Team coaching

Today, individual in-person coaching is the most common experience. However, we have seen an increase in popularity of group/team coaching. This is usually a group of no more than six people and may or may not be an intact team. The process demands coaching and group facilitation skills from the coach (along with a level of experience in group process and dynamics). Therefore, it is an advanced form of coaching. Group coaching not only offers economic advantages and scalability, but because 20% of learning takes place through supportive learning relationships, group coaching offers the added advantage of peer learning. For intact teams, it also offers the opportunity for enhanced communication, empathy, and understanding. All these factors improve team morale, cohesion, and outputs. GIBS has found that group coaching is a particularly useful modality in leadership development contexts. As a result, GIBS has developed a significant group coaching capability, building group coaching into the majority of its academic and executive education programmes.

Group/Team coaching is not often emphasised in coach training, given that it is not needed to become a credentialed coach. However, as the demand increases, coaches would do well to upskill themselves in this valuable process. Buyers may want to review a coach's experience in group/team coaching when making final selections. At the time of this study, coaches' time was split as follows:

- **62% spent on individual face-to-face coaching;**
- **17% on individual coaching via technology;**
- **11% on team coaching; and**
- **9% on group coaching.**

This time allocation does not align with how organisations use coaching, with 81% of organisations using individual face-to-face, 57% of organisations using team coaching, and 33% using group coaching. The buyers could select as many coaching options as they are currently implementing, so the percentages exceed 100%.

7.3 Virtual coaching

Despite some evidence of virtual coaching as an emerging trend, historically it has not been used much in South Africa, with the exception of global coaches. COVID-19 has changed this. Digital adoption has been accelerated in 2020 as people become more familiar with online platforms, such as Skype and Zoom. It is becoming increasingly important for coaches and coachees to embrace technology. Technology offers another opportunity for personalisation, which is important in any coaching engagement. According to GIBS market research conducted by Carnelley Rangecroft Consultancy in 2020, traditional in-person coaching can be considered long and admin-intensive. Coachees and buyers show a preference for hybrid coaching that offers both in-person and digital connects.

Technology is seen as an additional key trend and the comments relating to technology vary, with some coaches being very positive and others more negative. All coaches agreed that technology will disrupt the coaching industry. How the industry responds will determine whether this impact is positive or negative. A recent GIBS article by Reid, Proudfoot, and Ackermann (2020) on group coaching, notes:

...Conducting group coaching via online platforms is a tried and tested offshoot... which has been spurred on in recent years with the development of viable online platforms such as Zoom, Microsoft Teams and Skype Business. Even before the coronavirus crisis, Coaching@GIBS experts were offering virtual group coaching for clients in South Africa and around the continent with growing success. What the current crisis has done is blown open the world's tentative adoption of online options and forced online group coaching to the fore.

Technology has certainly supported the growth of the coach industry. However, as the article wisely notes, it is not without its own challenges, 'including a reticence to commit to coaching online and even to the necessity of rewiring old ideas to better suit an emerging new world' (Reid et al., 2020). Furthermore, with the rise of technology, we have seen an influx of coaching bots and automated coaching apps. While these innovations may appear savvy at face value, they undermine the richness of the coaching experience – unleashed fully with a fellow human being who is able to partner with you in the limitless exploration of your thinking and creative capacity.

The positive application of technology may support the need for on-demand coaching. In a research report by the ICF and Human Capital Institute, Filipkowski, Heverin, and Ruth (2016) summarised this well as follows: 'An app to track when I coach or when I am coached would be helpful... as would an avatar that could be used to practice skills.' Technology supports the democratisation of coaching, with the potential to offer economies of scale and accessibility. It also allows the buyers of coaching to easily track coaching engagements. No such platform exists in South Africa – yet! Watch this space as GIBS launches South Africa's first comprehensive online coaching platform. Enabling technology can also support managers in applying coaching skills in real time. This is important, given that we know only 10% of learning takes place formally. The rest is done on the job or through relationships.

It is no surprise that these key trends all offer economic and time efficiencies, but there are many other benefits. For example, group coaching in an organisation can be used to develop a collective leadership culture, address organisational culture, and support development programmes. The benefits of technology include being able to work from home, coach globally and optimise time by using virtual coaching platforms. Currently, virtual coaching takes place individually (17%), with less than 1% of team and group coaching taking place online. Using technology would also make coaching more scalable. There is the concern that, as people use technology, they may become more disconnected from themselves and less able to communicate effectively and deal with conflict. The paradox is that coaching using technology might address this issue.

8. Recommendations and conclusion

There are many individual recommendations that can be made and are found in each of the surveys. There is one overarching recommendation that we believe will make a significant difference to the quality and impact of coaching within organisations.

GIBS strongly recommends that organisations utilising coaches and coaching services develop a **clear, documented purpose, process and policy** to support and maximise the effectiveness of coaching. To this end, GIBS has developed a 'How to implement effective coaching processes within your organisation' guide. This 'how-to' guide is not prescriptive and does not tell the organisation whether it should use group or team coaching, virtual or not etc. However, it does aid in decision-making and advises about the strategic alignment of coaching processes to organisational objectives as well as to learning and development goals. It addresses components like:

- **the value (increasingly) of group and team coaching;**
- **using coach training to support internal peer-to-peer coaching and internal coaching;**
- **recommending certain activities like triad sessions, reporting, and other processes of alignment; and**
- **advising on the value and process of coach matching.**

This guide can be found at <https://www.gibs.co.za/coaching/pages/coaching-resources.aspx>

Coaching is one of the fastest growing industries in the world. Business coaching differentiates itself in a saturated market by prioritising the intersection of organisational and individual goals. This report provides the first integrated definition of business coaching, based on surveys of coaches, coachees, and buyers of coaching services. The report emphasises the partnership that takes place in context. Personal and leadership development are goals shared by all respondents. These results are amplified with the personalisation of coaching and the customisation of coaching interventions in organisations. Coaching is personalised through specialised design and deployment. Logistics play a big role here, too – the timing of sessions, rates, and coach selection. A coach credential is important to the buyers of coaching, while coachees most value rapport, but both note the importance of business experience of the coach – after all, it can be lonely at the top!



This report highlights three key trends in coaching: internal coaching, group coaching, and virtual coaching. We want to thrive in this VUCA world. It is widely acknowledged that coaching is a powerful tool for managers and leaders to use and leverage in personal and professional development. Daily, we encounter coaching moments – difficult conversations, bold decisions, critical communications, untapped potential, and a desire to innovate. Managers with coach competence will be differentiated. And organisations with a coach culture will perform. Coaching should be an integral part of the employee experience.

The Fourth and Fifth Industrial Revolutions invite us to reclaim the unique and valuable attributes that make us human. To do so will require a deep exploration of self, time to think and focus, navigation of our boundless imaginations, and putting our energy and creativity into meaningful action. It will also be about optimising team collaboration and facilitating solutions. We will reinvent our virtual water cooler to encourage the sharing of ideas. We will pioneer new ways of working that are personalised and impactful. We will harvest wisdom from a variety of sources. And we certainly will not do it alone. Coaches are the key competitive advantage for individuals and organisations in mastering the future of work today.

Appendix A:

Authors and researcher



NATALIE VAN DER VEEN



Natalie is a trained business coach (ICF ACSTH) and facilitator. With a deliberate blend of marketing and coaching skills, she uses human-centric methods and ideas to research, write, and consult in impactful marketing, leadership, and the future of work.

Previously, Natalie worked at Africa's leading business school, GIBS, focusing specifically on personal learning processes and application. Natalie has experience in the design and delivery of customised leadership development programmes for corporates across industries. She blends her multinational marketing experience with her capacity as a consultant and coach to understand drivers of human behaviour. She strives to ensure that all learning experiences are made personally meaningful so that this relevance translates into transformation, impact, and sustainable change in the workplace. Natalie is deeply passionate about human-centric leadership and the future of work. To this effect, she has published various articles and case studies. She enjoys working with intentional individuals and organisations that prioritise balance, collaboration, inclusion, and sustainability.

ALISON REID



Alison is an internationally accredited professional coach and the director of the coaching and facilitation functions at GIBS. Prior to joining GIBS, she ran her own consultancy and worked in clinical and academic brain function settings in the Middle East and South Africa. Alison is an educator, researcher, and coach, holding a master's degree in executive business coaching and is accredited with the ICF, Academy of Executive Coaching, and International Society for the Psychoanalytic Study of Organizations. She writes for both academic journals and media. Alison is passionate about human-centricity. She believes that human-specific skills like creativity, emotional and social agility, critical thinking and capacity for complexity will increasingly become the key differentiators in tech-dominated workplaces as well as a catalyst for healthier, more connected and responsible societies. With the right motivation, awareness and support, human beings are able to connect, collaborate, and solve the largest problems facing us as a species for a space where all can thrive.

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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, Natalie joined Wits Business School (on a 70% contract) as the 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.

- ICF, South Africa chapter
- Knowledge Resources
- COMENSA
- GIBS Professional Associates

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