

**GOLDRICH ASSOCIATES INTERNATIONAL NETWORK, INC.**

**TASK-LIST FOR EXECUTIVE AND BUSINESS COACHING<sup>1</sup>**

<b>TASK</b>	<b>STATUS</b>
<b>ESTABLISH THE CONTEXT FOR COACHING</b>	
Reach agreement with the sponsor regarding the organization's needs and the connection between coaching and the organization's success.	
Reach agreement with the sponsor on the "challenge" or "problem" and establish the major outcome goals of the coaching.	
Determine whether the goals are performance or developmental goals	
Establish "ready" "willing," and "able."	
Develop and implement a strategy for obtaining buy-in from key stakeholders	
Specify the confidentiality conditions	
Establish roles, responsibility, authority, and accountability	
<b>REACH AGREEMENT ON THE OPTIMAL APPROACH FOR THE ORGANIZATION</b>	
Clearly link the coaching, consulting, facilitating or training to the strategic plan, organization leadership model and the bottom line.	
Identify critical success factors for the organization, sponsor and participants.	
Agree on the proper mix of coaching, consulting, facilitation or training	
Identify participants	
Establish a structure for ongoing input from top management, peers and/or customers	
<b>OBTAIN DATA</b>	
Individual and/or group interviews	
360 feedback	
Personality style tests	
Communication and Team style tests	
Values instruments	
Training analysis (if necessary)	
Organization assessment (if necessary)	

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TASK	STATUS
<b>ANALYZE DATA AND PRESENT TO PARTICIPANT</b>	
Analyze data and develop feedback	
Review confidentiality conditions	
Present feedback and recommendations to participant	
Make appropriate mid-course corrections with top management	
<b>DEVELOP AN AGREEMENT TO COACH</b>	
Establish “ready” “willing,” and “able.”	
Design the relationship	
Review assessment and feedback data with each participant	
Establish goals	
Confirm or establish link between personal and organizational goals	
Develop behavioral objectives	
Secure agreement on goals and measures from sponsor	
<b>COACH</b>	
Interviews for more data or clarification, as required	
Personal exploration	
Skill building exercises	
Role play with feedback	
Homework	
Ongoing feedback system	
<b>FEEDBACK TO AND FROM SPONSOR</b>	
Ongoing feedback based on coaching plan	
Mid-course corrections	
Final conference meeting with sponsor and coach to close the process or plan next steps	