



# 5 Things You Need To Know Before Purchasing a Coaching Platform

## OUR MISSION

# Fuel professional growth and success through the power of trusted relationships

- Coaching
- Mentoring
- Integrated Learning Paths
- Leadership Development Programs  
(DEI, New Manager Onboarding, High-Potentials, Org Transformation, etc.)



Torch

# Our speakers today



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# #1 Clearly Identify Your Goals

## #1 CLEARLY IDENTIFY YOUR GOALS

Success for any coaching program, in any business, starts by anchoring your purpose in the **goals of the organization.**

## #1 CLEARLY IDENTIFY YOUR GOALS

It's critical to map your initiatives to the bigger picture

This allows you to more effectively communicate the broader value of your work *and* how it helps the organization succeed.



## #1 CLEARLY IDENTIFY YOUR GOALS

# Clearly support your people strategy

A people strategy acts as the roadmap for both the organization and its employees—articulating how people will be equipped and supported to succeed.

## How do your leadership development goals align to your people strategy?


- What goals from your current people strategy does coaching serve?
- How does coaching complement your existing people strategy?
- And, how does coaching serve the future vision of your people strategy?

## #1 CLEARLY IDENTIFY YOUR GOALS

# Develop your program goals

There are many objectives that coaching supports.

- What are the one or two most important goals that you plan to support with your coaching program?
- Why did you select those goals over others?
- What is driving the need to work toward them now?

WORKSHEET 

### Define Your Goals and Their Business Impact

Can you draw a clear line from your strategy, goals, and programs to your overall people strategy? Use this worksheet to help guide your thinking. Fill in the right side with the stated goals of your organization, HR team, and working team. Example text is in grey.

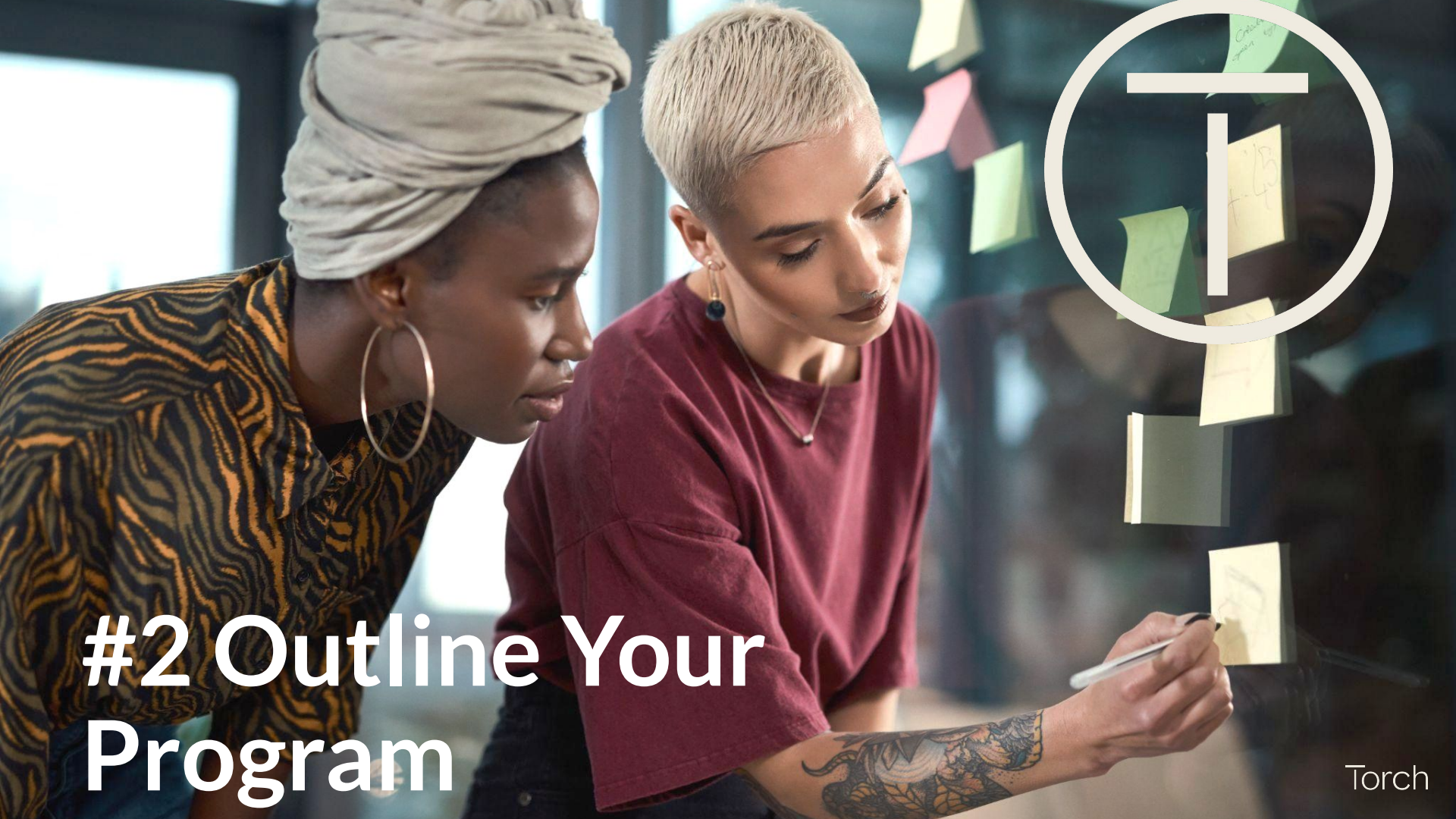
Area of focus	Example	Your answer here
<b>Organizational Goals/Strategy</b>	<i>Accelerate Innovation</i>	
<b>People Strategy</b>	<i>Attract, Recruit, Onboard, Retain, Develop</i>	
<b>Your Team</b>	<i>Support our organization's people with highly-skilled managers.</i>	
<b>How does coaching serve that goal?</b>	<i>(1) Great managers attract, retain, and refer talent (2) Coaching is a strong way to practice removing bias from a hiring process/day-to-day work (3) In developing managerial skills-coaching is more effective than other methods. Learners forget about 75% of new information after only six days-if it's not applied to their work</i>	





## Are you buying for your organization or a specific function?

Not every purchase of coaching comes from a centralized organization. Some are for a specific business-unit or function. In those cases, it's still important to tie your goals to the goals of the function and the broader business.



# #2 Outline Your Program

## #2 OUTLINE YOUR PROGRAM

# Identify your target participants

Choosing your participant group, or even the exact participants, should be dictated by your program strategy and goals.

Organizations often tailor their coaching programs to serve the following groups:

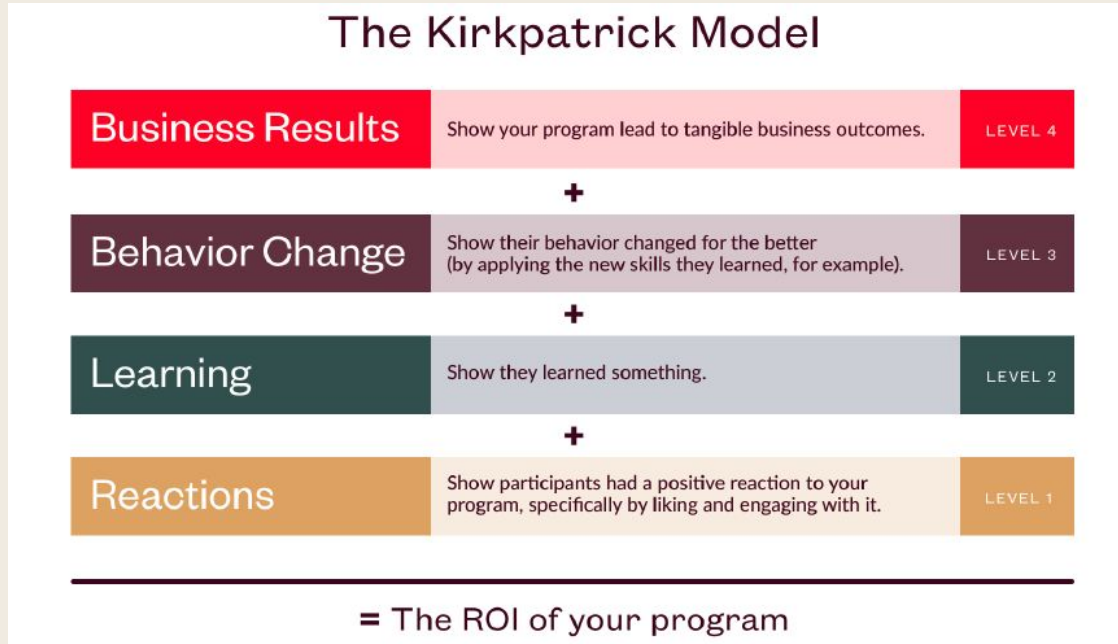
- High-potential employees
- New managers or recently promoted employees
- Leaders driving diversity, equity, and inclusion (DEI)
- Executives leading transformation/change



## #2 OUTLINE YOUR PROGRAM

# Articulate how you will measure success

There are a number of frameworks that you can use to demonstrate leader growth and program ROI.





# #3 Make a Winning Business Case for Coaching

## Present the facts

Sharing the “why” behind coaching can help you build a strong case and overcome challenges that you face internally. Be prepared to **present a well-rounded and researched case to stakeholders.**

### #3 MAKE A WINNING BUSINESS CASE FOR COACHING

## Coaching vs. other investments

There are many ways to develop people but many of those methods don't achieve the outcomes that organizations need to move the business forward. In fact, they have many limitations:



- ⊗ **Low completion:** Most learners **don't complete** the online courses they start with completion rates between **5% and 15%**
- ⊗ **Easily forgotten:** Learners **forget 75%** of new information after only 6 days
- ⊗ **Low trust:** **67%** of executives say their leadership development **programs don't work**

# Coaching vs. other investments

Coaching is designed to help leaders overcome these challenges



## Personalized

*Coaching is tailored to the strengths and opportunities of the individual in the context of their day-to-day work.*




## Safe

*People grow most in the context of trusted relationships where they feel psychologically safe and supported.*



## Accountable

*Regular meetings to check in on progress towards goals helps individuals stay committed to their plans for growth.*



**86% of leaders** agreed that relationship-based approaches to leadership development achieve better results than more passive forms of learning



### #3 MAKE A WINNING BUSINESS CASE FOR COACHING

## Identify your stakeholders



#### Another stakeholder to consider

If you're funding your program for or with a specific department, ensure its leader has visibility & a voice in the selection process

## #3 MAKE A WINNING BUSINESS CASE FOR COACHING

# Illustrate the path to ROI

Mapping the path to ROI for coaching through the Kirkpatrick model

Kirkpatrick model level	Proof Point	Metric	Timeline
<b>Level 4</b> Business Results	Show that your programs lead to tangible business outcomes	Retention, Promotion, Engagement	6 mo- 1 year post coaching engagement
<b>Level 3</b> Behavior Change	Show their behavior changed for the better	Qualitative and quantitative feedback from self, peers, and coach	6 mo-1 year
<b>Level 2</b> Learning	Show they learned something	Qualitative feedback, employee engagement on team (if a manager)	Immediately→ 6 mo
<b>Level 1</b> Reactions	Show participants had a positive reaction to your program	Ratings (like NPS), program completion	Immediately after a coaching engagement, ~3-6 mo of launch

### #3 MAKE A WINNING BUSINESS CASE FOR COACHING

## Avoid delay and address its cost

**A delay in investment means a delay in results.** Be ready to present a strong answer to, “Why now?”

- How will delaying at this moment impact the larger goals of the organization?
- What other programs offer a reliably high ROI?





# #4 Understand Your Investment Budget

## #4 UNDERSTAND YOUR INVESTMENT BUDGET

# Get a full picture of your budget

Funding for programs can come from a few sources depending on your organization

### Centralized

Funding comes from L&D or HR budget.

### Decentralized

Funding comes from departmental budgets or individual employee learning and development stipends.

### Blended

Funding comes from both the central L&D budget and departmental budgets.



Once you have a full picture of your budget requirements and potential funding sources **check with your finance team to make sure it's an acceptable way to fund the program.**



# #5 Choose Your Solution Partner



# What does a typical buying process look like?



## #5 CHOOSE YOUR SOLUTION PARTNER

# Develop your requirements

### COACHES

The most important piece of a coaching program. Are the coaches:

- Highly trained, with relevant certification, degrees, and experience?
- Able to coach participants at different experience/leadership levels?

### TECHNOLOGY

Does the technology of the people development platform:

- Reduce burdensome admin tasks?
- Integrate with key pieces of technology?
- Integrate with other learning systems?

### MEASURABILITY

Can you measure the success and demonstrate the impact of your program?

- a perspective on how to measure and report on success at different levels?
- access to performance data on platform?

### CUSTOMIZATION

Do technology and support teams work with you to align to your business needs:

- Customize parts of the leadership assessments?
- Tailor elements to reflect your culture, values, and brand?

### SUPPORT & ADVICE

A platform is more than technology. Does the solution:

- Offer access to the behavioral scientists that built the platform?
- Professional services and best practices to shape and optimize your program?



## #5 CHOOSE YOUR SOLUTION PARTNER

# Make a decision

After evaluating you'll have a much clearer picture of how different solutions meet the needs of your organization and the tradeoffs you'll need to make if you choose a specific provider.



### CHECKLIST

## Did I learn everything I needed to during my coaching solution demo?

Every coaching or people development platform demo will be a little different. Regardless of the path the salesperson takes, make sure you select a partner that makes you feel confident about these 10 critical areas of coaching.

QUESTION	YES	NO
I have the functionality I need to get started now, but still have room for growth	<input type="checkbox"/>	<input type="checkbox"/>
I feel confident in the qualifications and experience of the coaches	<input type="checkbox"/>	<input type="checkbox"/>
I'm able to customize the platform to meet the needs of our brand, values, and goals.	<input type="checkbox"/>	<input type="checkbox"/>
The platform offers key integrations to systems and content	<input type="checkbox"/>	<input type="checkbox"/>
Set up and implementation are not burdensome. I can access best practices, expert advice, and support.	<input type="checkbox"/>	<input type="checkbox"/>
My participants will be able to: <ul style="list-style-type: none"><li>• Get started quickly</li><li>• Access resources to guide the coaching engagement</li><li>• Anchor to goals</li></ul>	<input type="checkbox"/>	<input type="checkbox"/>
The pricing and packaging meets the need of my organization today and in the future: flexible, no minimums, pilot options.	<input type="checkbox"/>	<input type="checkbox"/>
I am able to measure the success of my programs.	<input type="checkbox"/>	<input type="checkbox"/>
The platform meets the security requirements that my organization has.	<input type="checkbox"/>	<input type="checkbox"/>
The platform methodologies are sound and based in behavioral science principles.	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

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# Coaching will transform your organization.

“Today I realized how important this platform and my coach are. My coach is helping me meet not only career goals but also my personal development goals!”

-TORCH COACHEE

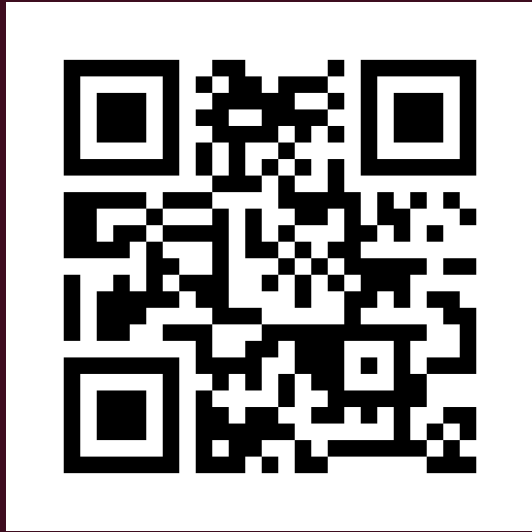
“Understanding how to develop leaders inside a company is one of the biggest challenges for every founder and CEO. Torch helps create better leaders. Pretty much a no-brainer”

-JUSTIN KAN, Co-founder, Twitch

“The program helped me find myself again, and have fun. It helped me transition to be a better leader/senior in my team and act like one”

-TORCH COACHEE

Download the *Buyer's Guide for Leadership Coaching Platforms* with the QR code below:



# Torch

## Torch is the People Development Platform that unlocks the potential of people, teams, and organizations

By combining coaching, mentoring Torch helps you design, manage, and measure programs that drive the success of your people—and your organization.

Request a demo at [www.torch.io](http://www.torch.io)

