

The Emerging Role of the Internal Coach

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ABSTRACT

Growing from the demand for flexible, targeted development options and the acceptance of executive coaching emerges the role of the internal coach, a professional within an organization who, as a formal part of his or her job, coaches managers and executives. This article identifies this trend, defines the role of the internal coach, compares it with external coaching, and outlines the key issues that need to be addressed in delivering internal coaching programs. It is hoped that this material provides a foundation for future investigation and discussion as the internal coach role matures into a valuable and frequently used tool in management and executive development.

—Coaching has become a mainstream offering in management and executive development functions. Engaging professional coaches to work with managers on their development is a regular occurrence in most large corporations in the United States (Kilburg, 1996; Morris, 2000; Peterson, Uranowitz, & Hicks, 1996; Tyler, 2000). Gone is the stigma of needing a coach to help with an individual's development, to be replaced by the opposite—the status of being important enough to the enterprise to deserve the investment of individual attention (Buss, 1998; Nobel, 1994; Stern, 2001). As with the explosion of popularity of personal trainers to guide and maximize physical development, management and executive coaches these days build their efforts on a ubiquitous interest in professional development. The role of the executive coach has evolved from its roots as the organization's agent on performance remediation to the present focus on the upside of an individual's potential (Zemke, 1996). There are still performance improvements to be made, but almost always as investments in the organization's future, rather than a “fix it” ultimatum.

—At the same time, other trends have been facilitating the growth of coaching. People development as a broad topic has become much more routine in most organizations (Tichy & Cohen, 1997; Toomey, 1994). Managers these days are expected to foster the development of their staff as well as to be prime movers of their own growth. Individual development planning has graduated from being a two-line entry on an appraisal form to being an on-line template that managers and their direct reports are expected to actually write and implement (Hicks & Peterson, 1997). In addition, various feedback processes, such as 360-degree and multirater feedback, have become widespread inputs to those development plans. Many more managers have gotten used to interpreting varied information about themselves in shaping well-founded and actionable development plans (Peterson & Hicks, 1995). Finally, to keep pace with the increased sophistication of the

entire development function, organizations have hired individuals with commensurate skills and upgraded the skills of existing staff (Tobias, 1990). This process has brought into organizations levels of expertise about development that were previously available only by going to outside consultants.

☞ What has not changed until recently is the fact that executive coaches were always external to the organization (Tyler, 2000). This fact made sense given the original requirements of the role: counseling skills focused on behavior change, knowledge of organizational functioning, confidentiality, and, to varying degrees, an overarching professional identity (e.g., relevant advanced degree, license, or certification) that elevated the coach's credibility for both the individual and the organization. Given the older agenda of remedial, or “must-fix” coaching, these requirements were essential in quickly instigating a developmental focus and reducing defensiveness of the participant. Along with the normalizing of coaching and development planning, these requirements also have eased. Reaching outside the organization to screen and contract with a professional coach became less important than making rapid progress on a development plan, especially because similar, if not identical, resources were increasingly likely to exist within the organization. It was inevitable that internal coaching resources would be matched up with managers who wanted, or needed, to implement their development plans. For some coaching needs and for some participants, the clout of engaging an external consultant became less important than getting coaching mobilized.

☞ Into this maturing arena comes the predictable, but not entirely obvious, emergence of the internal coach. Although many human resource (HR) generalists would say that coaching had always been part of their jobs, it was informal and transactional. Quietly and without fanfare, the role of the internal coach has achieved recognition in some large organizations as valuable in its own right. It may not represent a professional's full-time responsibilities, but, where it exists, the role itself has achieved enough legitimacy to elicit a developmental commitment essentially the same as what would be expected with an external coach.

☞ The numbers of internal coaches or of organizations employing them is unknown at this point, but their presence is clear. At a recent coaching conference at the University of Maryland's University College (“The Art and Practice of Coaching Leaders”), some attendees identified themselves as internal coaches and, in some cases, as part of an internal coaching department. When asked, they proudly talked about the growth of their services and were clearly energized to absorb all they could to take back to their organizations. Examples of their backgrounds included an HR generalist who overtly dedicates part of his time to coaching, an external consultant who accepted a part-time role as an internal coach, and a sales manager whose prowess as a coach brought her to seek to have an impact beyond her immediate work group. Although discussions with these internal coaches were informal and no tally was attempted, subsequent conversations and interviews have confirmed their growing presence. In organizations such as Teletech in Denver; IBM, Scudder Kemper, and TIAA/CREF in New York; State Street Bank in Boston; and US Tobacco in Connecticut, internal coaches have established

themselves and proven their value in providing coaching services from their unique perspective.

— This article is an attempt to formally recognize the role of the internal coach, define it, and highlight some key policy and practice challenges that internal coaches, or internal coaching departments, need to resolve to successfully deliver their services. This content is derived from approximately 10 structured interviews I was able to conduct with internal coaches as well as my own perspective as a highly experienced coach with both internal and external consulting experience. I hope that this article will both provide practical guidelines to internal coaches and stimulate discussion and research about this newly emerging role.

What Is Internal Coaching?

— Internal coaching as a role is derived from the longer history of external executive coaching, with one important and obvious difference: The internal coach is a fellow employee of the same organization as those he or she coaches. The implications of this difference are explored later in this article, but it is useful to summarize elements of the role in totality.

— Executive coaching has been defined variously (Buss, 1998; Hargrove, 1995; Kilburg, 1996; Morris, 2000; Peterson & Hicks, 1996; Zemke, 1996), but a common theme is that it is anchored by a one-on-one relationship of trust aimed at fostering learning and professional growth. (The focus here is exclusively on professional development; comments are not intended to apply to personal coaching that has emerged as a counseling and therapy model.) Most definitions emphasize the coaching relationship as providing the impetus for professional breakthroughs, which applies equally well to internal and external coaching. Other parallel factors include an emphasis on the organizational context, such as maintaining relationships with sponsors of the coaching (i.e., boss and HR contact), and collaboration on a development plan that all of those involved can use as a guide.

— The simplest definition of internal coaching may be a tautology: being formally viewed by organizational coworkers as a coach makes it so. The clarity and strength of the label, formalized under a job title, may be all that is needed to operate as an internal coach. However, wanting to be more descriptive here, and in keeping with the attempt to delineate the emerging role, the following definition is offered: Internal coaching is a one-on-one developmental intervention supported by the organization and provided by a colleague of those coached who is trusted to shape and deliver a program yielding individual professional growth.

— From the standpoint of setting standards, however, there are several implications of this definition that should be made explicit. Internal coaches should be outside of the usual chain of command of those they coach, to differentiate it from the job coaching that all effective managers do. Also, whereas external coaches usually use a standardized assessment at the beginning of coaching applicable to the wide range of situations,

internal coaches can often be more flexible. They will know extensive background information about the situation and have access to the results of organizational processes, such as performance appraisals and multirater feedback surveys. They can therefore shape an assessment that targets the key development issues without overmeasuring. Finally, derived from both the importance of a trusted relationship and the presence of a development plan, multiple coaching meetings are assumed. A single chat may be interesting and useful but should not be defined as a coaching relationship.

☞(Note: No attempt is made at this point to delineate professional backgrounds of those delivering internal coaching services. Suffice it to say that as with other newly emerging roles, responsibilities and activities determine qualifications. Suggested competencies are listed later in this article. Over time, however, a dialogue about requisite experience, education, degrees, or even certifications would be a useful endeavor.)

What Is Not Internal Coaching?

☞Because there are activities that are similar to internal coaching, it is useful to highlight their differences. In particular, the general advisory role often provided by HR professionals and other internal consultants should not be construed as internal coaching. Even though both advising and coaching involve discussing sensitive topics, considering alternatives, and making recommendations, their goals and targets are different. Advising on topics such as recruiting, compensation, morale, and so forth leverages an HR professional's technical expertise in those fields for the best interests of the organization. Internal coaching is focused at the individual level, aiming to maximize a specific manager's effectiveness. Internal coaches often have insights about the organization, but those insights are plowed back into assisting individual growth. For example, even if a manager and an internal coach are discussing that manager's staffing plan, the focus would be on the developmental opportunity that resides within those challenges rather than on any specific staffing decision.

☞Team builders, organization effectiveness consultants (internal), and trainers may also engage in activities similar to those of internal coaches. Not only might the topics under discussion overlap with coaching, but those professionals may have one-on-one meetings as a component of their efforts. However, because they work with groups and define their goals in terms of organizational improvement, they do not fit the definition of internal coaches. Many internal coaches may have experience in, or currently do, organizational development projects, but a clear distinction should be maintained between the roles.

☞Finally, mentoring is sometimes used as a synonym for coaching but will not be so used here. Although mentoring involves a one-on-one relationship and repeated meetings, its focus has evolved to emphasize career advising and advancement (Murray, 1998). Mentors are most frequently viewed as internal sponsors, helping to make key introductions that can lead to career opportunities, especially for high-potential managers from underrepresented groups. To the extent that internal coaching includes career discussions, one could say that all coaches do mentoring as part of their assignments. The

converse, however, is not true; in general, mentors need not delve into the specifics of skill building or behavior change that a coach would.

Internal and External Coaching: Two Sides of the Same Coin

☞ There are many benefits of internal coaching that are fueling its growth. An obvious one is cost savings as compared with the fees for external coaching programs. Internal coaching resources can be applied more widely than more expensive external coaching. More important, internal coaches often can use their existing insights about the organization and its players to make faster initial progress in suggesting a developmental agenda. Similarly, an internal coach is more likely to be able to observe or hear about how those being coached are doing and fold those observations back into the coaching. Finally, internal coaching is a tangible manifestation of the “learning organization” (Senge, 1990). For those organizations that have made efforts to embrace that identity, internal coaching can model it as well as help individual managers make the transition.

☞ Although these benefits are compelling, external coaching has advantages as well. It does not require any in-house resources or additional staff. Also, traditionally external coaches with impressive degrees and broad coaching experience are likely to engender more immediate credibility (Tobias, 1990). This credibility can be essential with a resistant or defensive manager who is being paired with a coach. Furthermore, external coaching relationships are “cleaner”; internal coaches may have multiple roles and interactions, both formal and informal, with those they coach. This situation can be confusing or even raise concerns about trust and confidentiality if not handled with sensitivity and forethought.

☞ Given their mutual trade-offs, even where an internal coaching function exists, however, there always will be managers and executives for whom external coaching is the best choice. This may have to do with the complexity of the personality involved, coach credibility, concerns about confidentiality, or other factors. Organizations should view these two faces of coaching as complementary, both supporting the objective of managerial growth and development but for somewhat different audiences. They should not be viewed as competitive with each other; doing so could actually inhibit the effectiveness of both by making one appear inherently superior to the other, which is not necessarily the case.

Key Challenges in Shaping an Internal Coaching Program

☞ Because no definitive guidelines exist about how to design and implement an internal coaching program, the goal here is to highlight the key challenges that such programs must address. These challenges are interdependent; an iterative approach is necessary in determining how they would apply to a specific organization. Suggestions are offered with the hope of stimulating dialogue about best practices in dealing with these challenges.

Internal Coach Selection and Training

☞ Those who may be interested in providing internal coaching services and those who are likely to be successful in the role may not always be the same. Just as with any other function, competencies should be identified that directly contribute to success in the role of internal coach, and these should be objectively applied to candidates. A process could be designed using a board or panel of knowledgeable professionals, possibly including a trusted external coach, to evaluate candidates against the required competencies. Rather than a yes or no decision, evaluations could highlight both strengths and gaps for the role, allowing development plans to be implemented for those truly motivated to ready themselves.

☞ Training for internal coaches is too large a topic to be treated here, but a few suggestions are offered. Assuming a foundation of relevant courses (or a degree) in counseling, organizational behavior, and individual psychology, internal coaches need to have a thorough grasp of the coaching guidelines applicable to their organization. These guidelines should be written for easy distribution, possibly evolving with changes in the program, describing coaching services and dealing with key issues likely to confront coaches. A reading list for coaches as well as any required organizationally sponsored leadership or management courses is also useful. Furthermore, because tutorials on communication and interpersonal skills are often part of coaching, standardized modules on these topics should be assembled. Once coaches are trained to deliver these modules, they will provide a consistent foundation that can be flexibly applied within the context of the coaching. Similarly, training or certification in the use of organizationally preferred 360-degree or self-insight questionnaires should be provided. Finally, ongoing in-service training and case supervision should be offered on a regular basis.

☞ Creating a consensus about key competency requirements for internal coaching is an excellent opportunity for interorganization benchmarking and cooperation. For the present, however, the list below is offered to guide both selection and training. Effective internal coaches do the following:

- Build trusting relationships with colleagues focused on their professional growth and development;
- Understand a model for a coaching process and execute it flexibly but dependably;
- Derive deep satisfaction from making discoveries about why others behave as they do—they have psychological curiosity;
- Articulate insights about behavior in ways others understand and find useful on the job;
- Understand a model of how adults change and grow and use such a model to guide coaching efforts;
- Approach job challenges with optimism and creativity—they are a source of ideas and suggestions for on-the-job learning;
- Have expertise in a variety of managerial topics and are able to provide just-in-time guidance on those topics;
- Are superb listeners, both as role models and information seekers;
- Balance the dual commitment to individual colleagues and the organization—they are able to transition smoothly between multiple organizational roles;
- Are constant students—they model how to learn from experience and expand their effective range in coaching;
- Have the maturity and ego strength to seek help with complexities outside of their

expertise, accept help if it is provided, and refer to other coaches or professionals if it is in the best interests of a colleague; and
Feel gratified with strengthening the organization one manager at a time.

General Expectations and Program Design

☞ Coaching is an activity deceptive in its apparent simplicity. Most managers would believe they understand it but in fact would be hard pressed to list steps in a coaching process. Internal coaches must anticipate the need for clarity and set general expectations about roles and milestones. They can publish, or have available by e-mail, a description of the types of issues that can be addressed with internal coaching, the steps in a typical coaching process, and how one would explore initiating the process.

☞ For internal coaches, it is likely to be useful to describe, or even label, specific coaching programs tied to organizational events—for example, coaching tied to specific outcomes of performance appraisals or development recommendations. Coaching could be applied in support of multirater survey feedback and development planning. Transition to a new role is another event that could be used to trigger a specific coaching program. Descriptions of such programs may be quite similar, but interested participants are more likely to be able to commit when a program's structure is spelled out.

☞ Just as external coaches have moved away from “black box” characterizations of their programs, internal coaches should be descriptive of what happens, when, and with whom. A typical structure might be organized around several steps or phases: (a) development planning, (b) contracting, (c) skill building, and (d) follow-up. Each could be described in terms of players, actions, outcomes, and time frames, with variations reflecting different types of coaching programs. General expectations could also be summarized for issues such as sponsor roles and confidentiality limits. These descriptions, although challenging to draft, would yield ongoing benefits in promoting services internally and keeping delivery consistent, especially when multiple internal coaches are operating in the same organization.

Confidentiality

☞ Although confidentiality is typically less of a concern when participants voluntarily request coaching, it must be clearly addressed in structuring an internal coaching program. Strictly speaking, complete confidentiality in any type of coaching is impossible. Organizational sponsors always know that an employee and a coach are working together and usually know what is in the development plan. The issue, therefore, is to clearly identify what is confidential and what will be shared. A simple but useful guideline is to structure the process so that all sharing of information with the organization is done jointly by the coach and the person being coached. Development planning and progress review meetings would include that person, the coach, the boss, and potentially an HR representative and would be the only time information would be provided to the organization. Of course, the coach would be free to gather information at any point but would be precluded from giving any independently. (Note: Legal precedent

supports breaching confidentiality if physical harm to anyone is perceived by the coach to be a threat.)

☞ With internal coaching, however, it is important to recognize that this simple guideline, or any other, would be tested much more frequently than with external coaching. Both formal and informal interactions are likely between the coach and organizational sponsors. Innocent hallway questions about how the coaching is going or what the coach thinks of the issues represent challenges to confidentiality. Internal coaches need a diplomatic way to avoid answering such inquiry. More complex challenges to confidentiality are likely when a coaching client posts for a new position and when a coach also covers HR generalist duties. How should the coach handle situations in which promotions, salary, succession, and so forth are discussed for those being coached? There may not be a definitive answer to this question, but the safest approach would be to officially opt out of the discussions. Although useful input may be lost, it should be viewed as a sacrifice in order to keep internal coaching viable. Internal coaches need to anticipate these and other pressure points on confidentiality, plan appropriate responses, and, to the extent possible, clarify expectations about confidentiality up front for all concerned.

Contracting

☞ Contracting aims to establish clear commitments between the coach and the person being coached. External coaches have an advantage in setting and having others follow these commitments because of the tangible nature of fees. Missing paid-for appointments or squandering an allocated budget amount brings rapid attention to the issue of commitment. It is therefore more important that internal coaches establish mutual expectations at the beginning of a coaching engagement. These should include specific points about scheduling, respect for each other's time, and procedures for changing appointments. Better than just discussing such points is also providing them in writing, possibly as a foreword to a folder or log that can be used throughout coaching to record ideas, keep track of progress, and be a repository for articles or handouts.

☞ One document that is key to the success of coaching and represents the most specific contract is the development plan. Effective development plans are targeted and short term, rather than broad, general, or comprehensive (Peterson & Hicks, 1995, 1996). They focus on just two or three developmental objectives, including specific examples of on-the-job behaviors that support those objectives, and identify others involved and time frames (Davis, Skube, Hellervik, Gebelein, & Sheard, 1996; Gollwitzer, 1999). A motivating development plan is a significant work product of the early collaborative efforts of the coach and person being coached. Even when someone begins coaching with a development plan already drafted, the coach always needs to explore it, test its meaning, and refine it to a point where it is clear, actionable, and on target for what needs to be developed. Making it a joint effort and a living document that can be revised and adjusted is one of the best ways to heighten commitment to what is to be accomplished through coaching.

—However, coaches should avoid the tendency to push for tighter contracting as a means to assure commitment. There are no guarantees for commitment, least of all in a process like coaching. The emphasis should be on the internal coach delivering consistent value, and lapses in commitment should therefore trigger questions more than contract waving. When coaches perceive that commitment is waning because of missed, shortened, or postponed appointments or other cues, they need to act quickly to explore those perceptions. Asking questions of themselves and their client may expose the problem: What progress have we made, and what have we still to accomplish? In what ways does the development plan need to be revised at this point? What new or different pressures exist in the client's work life? Although it might feel risky to raise such questions for discussion, it models a much healthier approach than becoming offended or seeking recourse with sponsors of the coaching. In their best use, contracts provide a basis to identify and discuss variation in commitment rather than as an illusory guarantor of compliance.

Sponsor Roles

—Sponsors are those colleagues designated as overtly supporting a coaching program. They routinely include a boss and an HR generalist responsible for the business or department in which the participant works, but others could be enlisted as well, including career mentors, past bosses, or dotted-line bosses. Sponsors are important players in coaching programs for many reasons. They inform both the coach and the person being coached about performance issues and perceptions before, during, and near the end of the program. They are excellent reviewers of a draft development plan, both vetting its practicality and clarity and serving as witnesses to the commitment that it embodies. Of course, they offer support and encouragement, and possibly feedback, as new behaviors are tried. Also, they offer both the coach and the person being coached informed listeners to discuss the progress of the coaching effort, especially if obstacles occur or commitment wavers. Finally, they offer a means to bookend coaching so that gains can be openly acknowledged.

—For all of their value, sponsors are often underused. In self-initiated coaching, as internal coaching is likely to be, their value may be overlooked in the desire to move ahead. Coaches should include them, for all the reasons stated above, even if the person being coached may not feel the need. Sponsor roles are not time consuming or complex. Especially for a boss, sponsoring the coaching is a natural extension of people management responsibilities. Being a sponsor simply formalizes coaching as a developmental intervention that adds to, but does not replace, the usual developmental commitments in a reporting relationship. Behavior change is much more likely to take hold if support, feedback, and praise are available from the existing management structure, represented by the sponsors, as well as from the coach.

Setting and Logistics

—Although it is a relatively simple topic, the setting in which to deliver coaching is a particular consideration for internal coaches. The ideal setting for coaching is a quiet,

comfortable room, free from distractions, with modest equipment available, such as a flip chart or white board and a video camera and monitor for playback. These requirements are unlikely to be met in a typical office, so the coach should have his or her own office or conference room set up to maximize the use of coaching time. Meetings can be scheduled with no ambiguity about where to meet and with confidence that no phones, e-mail beeps, or knocks on the door will interrupt the coaching.

☞ The right setting can support a variety of developmental activities. Coaches need to be prepared to teach listening, communication, and interpersonal skills as well as models of management and leadership that are often the underpinnings of developmental plans. Internal coaches can draw on appropriate modules from the organization's in-house curricula, also including ideas for exercises and role-plays. Videotaping and playback is a valuable tool for trying new approaches safely and providing feedback. Having it readily available makes it more likely to be used rather than having to make special arrangements for it to be set up.

☞ Internal coaches have the distinct logistical advantage over external coaches in the ready opportunity for real-world observation. Internal coaches can much more easily slip into a presentation or meeting, either as part of another role they perform in the organization or just as an interested colleague. They are therefore in an excellent position later to provide feedback to the manager being coached and brainstorm alternatives with concrete knowledge of the players and dynamics of the situation. Similarly, internal coaches have extensive shop floor awareness of organizational culture, business pressures, frustrations, leadership challenges, and anticipated change, which significantly adds to the immediacy and value of their counsel.

Assessment Tools

☞ Although external coaches may be deeply experienced with specific assessment tools, internal coaches have the advantage of being able to select from an often wider range of feedback tools and insight builders. Never to be underestimated, interviewing can have surprising value and should not be overlooked by internal coaches (Miller & Rollnick, 1991). For paper-and-pencil measures, they can scan the marketplace of vendors and select those instruments best suited to their organizational culture and coaching needs. Organizations are usually very willing to fund internal coach certification in such tools. Popular ones include the range of 360-degree surveys that are available, anchored to specific organizational levels or job types, interpersonal and communication style inventories, and values or motivational profile tests (Frisch, 1998). In some cases, organizations have customized tools or purchased the rights to use them without limitation, which provides opportunities for internal coaches to become experts in their application.

☞ Such tools can be useful early in coaching to help both the coach and the person being coached gain insight into behavioral tendencies and preferences. These insights can then be used to guide and inform the development plan. However, internal coaches need to apply standards for the use of these measures just as external coaches would. Test scores,

survey results, and feedback reports should be confidential, available only to the coach and the person being coached, and should be stored under lock and key. Even though results are usually descriptive and emphasize insight, they can easily be misinterpreted or overgeneralized by untrained or inappropriate users. Handling such instruments is somewhat easier if multiple internal coaches are operating in the same organization. Standards and procedures can be established as policy and included in statements descriptive of coaching programs. In addition, such policy can also allow for the coach to seek counsel from other coaches—bound by the same rules of confidentiality—in interpreting unusual or especially complex results.

Conclusion

—The goal of this article was to highlight and validate the emergence of a formal, organizationally sanctioned role for the internal coach. In doing so, key aspects of that role have been identified, defined, and contrasted with other HR roles in the organization. Awareness of key challenges that the role faces were also explored with the hope that such awareness will aid in their resolution. The internal coach role is still too new to offer definitive guidelines on these key challenges, but recommendations have been offered. More important, however, the hope here is to stimulate a dialogue about this emerging role. Best practices can then accumulate as the dialogue progresses, benefiting all internal coaches and those organizations planning on offering such services. There is every expectation that the roster of internal coaches will continue to expand. External coaching will expand with it, bringing greater appreciation for how the two approaches complement each other. Eventually, as internal coaching catches up and defines its practices more clearly, internal and external coaching will be viewed as two sides of the same coaching coin, realizing greater benefit for organizations committed to the development of their human resources.

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