

## How do you maintain corporate client confidentiality?

STICKY SITUATIONS GIVES US A WINDOW INTO **CRITICAL COACHING MOMENTS**. THIS SITUATION QUESTIONS COACHING INTEGRITY.

### the situation

“I have had a two-year coaching contract with a large corporate client, during which time I have coached both individuals and teams. As far as I know, the company has seen positive results. A new vice president has just been hired who doesn't know anything about coaching and is not committed to the coaching program put in place by his predecessor. He wants to see bottom-line impact from the coaching services I am providing to employees. Consequently, he is asking me to provide him with detailed information about the managers who report to him and what their coaching issues have been. If he doesn't get this information, he'll terminate my coaching contract with the company.”

Do you have a sticky situation that you want help with or a different perspective on? You don't have to go it alone. Let our senior coaches give you a hand. Please send your situations to: [letters@choice-online.com](mailto:letters@choice-online.com)



Vicky Trabosh claims, “Senior management and this manager in particular need to be continually educated about the process of coaching.”

Since you are a corporate coach who is not an employee of the company, the solution and answer is straightforward and simple. You will not report in to this new manager about the details of your coaching relationships. In my experience as a corporate coach, selling the concept of coaching to upper management is easy. Selling it to the employee who is told he will be receiving coaching that is paid for by the company is the big hurdle.

Senior management and this manager in particular need to be continually educated about the process of coaching. It is a personal and private relationship. Your credibility with the people you are coaching is paramount to them getting the greatest benefit from coaching. Hopefully your paperwork with your client includes a confidentiality agreement that you cannot breach. To talk with the manager about detailed aspects of the coaching is unacceptable.

To insure that I'm not just in a highly ethical mood, I talked with a CEO with whom I have worked for three years as a coach for him and his senior

**“To talk to the manager about detailed aspects of the coaching is unacceptable.”**

management team. A leader of an international firm who wears many hats, he sees the coaching I provide as a tool. I posed this column's question to him and he said, “I've hired you to help my managers grow. Without the confidentiality you maintain, the value of coaching would dissipate. I question what that manager is trying to do: help people be more effective or manipulate the coach and team to reach his personal goals?”

Your first tactic with this new manager is to educate him. He simply may not understand the coaching model. And this conversation will lead you to

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**Craig Carr, PCC,** states, “It may not be his commitment to coaching that is in question as much as it is his level of education in the paradigm, your services, and how they are meant to benefit the organization.”

**L**et’s see if we can break this down to two things going on instead of one big mash up. It’s easy to bunch circumstances together when things get complicated, right?

First, it is quite fair that the new VP wants to be shown the bottom line impact of your services. Let’s give him the benefit of the doubt since it is his job to make sure all the dots connect in his organization. As of now, it looks like he believes there should be a direct line from the coaching to the bottom line, or whatever measure he is using to determine efficacy. You will need to know what that is to be able to speak to his needs.

In other words, it may not be his commitment to coaching that is in question as much as it is his level of education in the paradigm, your services, and how they are meant to benefit the organization. Most execs at his level, if they are well trained and well placed, are open to hearing about what works and can recognize their own blind spots without prejudice. They know they must consider all input if they are going to make good decisions and compete

in today’s market. If this guy already has his mind made up, however, then the elimination of your program may be a foregone conclusion. Sorry.

If he is truly open to seeing the bottom line impact as he says, then you have a chance. This part, though more dicey, is where it’s up to you to make a difference. You clearly have a confidentiality contract and cannot attach identity to content, and must tread carefully as you *speak to him in broad generalities* when talking about your past clients. Come to him with openness and willingness to share everything you can without breaking the contract you had under the previous VP. Pace your conversation by letting him know you are happy to outline the coaching impact, and that he is going to be amazed at the scope of the results.

The knowledge you have now — “as far as I know the company has seen positive results”— is not going to cut it. You are going to have to find out those results by talking to past clients and people affiliated with your work, and understand the evidence for the

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**Carol Adrienne, PhD,** says: “No good can come out of your disclosing personal information on employees, so you must take a very conservative approach.”

**W**ell, this new VP sounds like a piece of work! I would suggest that the first thing you do is schedule a meeting with the highest ranking person in the human resources department. Ask them to go over your original contract with the corporation. What does it say? How was the subject of confidentiality handled? Was there an evaluation component that the corporation expected from you in order to continue funding your services?

Basically, the vice president has to abide by your original contract, without due cause for termination. He cannot use you to get information that he would not be able to get on his own. No good can come out of your disclosing personal information on employ-

**“You must take a very conservative approach.”**

ees, so you must take a very conservative approach. Your contract should have defined the guidelines for both client and coach, giving you grounds to stand by.

If the vice president persists in his attempts to coerce you to open your files or tries to terminate your contract, you should speak to your lawyer about the possibility of suing for breach of contract. If you disclose personal information on your clients, they could possibly wind up suing you!

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act on one of three conclusions:

- 1) a mutual understanding that you will continue your model;
- 2) an escalation of your discussion to this manager's boss to reach an understanding and have the upper level manager's support of your model; or
- 3) walk away.

There are hundreds of clients that need your excellence. It's easiest to work with and build existing relationships with clients who meet your values and allow you to do your best work. Your ability to be clear and concrete about the service you provide is necessary in the conversation with this

new manager. Practice what you preach. Communicate effectively and be a great coach. Be an example of how to live with integrity and honor. This leads to one of my favorite sayings and beliefs: *know yourself so well that no one can redefine who you are or what you offer.* You will be richer and more peaceful for your choice.

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goals you have achieved. One challenge will be to connect anecdotal or testimonial input to increased productivity, retention, or whatever you think will highlight your best work. The route to the bottom line may be indirect and

you are going to have to map that out for the new guy. From that point, if the conversation bears fruit, you can design with him what is needed going forward, and propose a new contract.

Again, when speaking, use general language for *who* got the results and say things like, "salespeople," "managers", etc. and then be specific about results, but without giving away identity. You are going to have to prepare for this presentation but if you know the results are great and good for the company, you owe it to yourself and the employees you've helped to fight for the contract. Good luck. •

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