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An extended version of this report is also available there as a series of web pages, with more topics and detailed commentary.

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# The Seventh Annual Sherpa Executive Coaching Survey 2012

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# Sherpa Coaching Survey 2012

## Executive Coaching: Here to Stay

Here to stay

Welcome to the seventh annual Sherpa Executive Coaching Survey.

This report is a free service of Sherpa Coaching, a team of authors and educators based in Cincinnati, Ohio, USA. Our research is co-sponsored by:

- § The University of Georgia Center for Continuing Education in Athens, Georgia, USA
- § Miami's Corporate & Community Institute, in West Chester, Ohio, USA, and
- § Tandy Center for Executive Leadership at Texas Christian University, Fort Worth, Texas, USA

This year, as always, we have polled coaches, clients, HR and training professionals, purchasing agents, and a wider group of professionals with an interest in leadership development. Here are three themes that tell us executive coaching is here to stay.

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### Credibility

Executive coaching has arrived. It occupies a place as a permanent fixture in the modern organization. The perceived value and the credibility of coaching are at all-time highs. For the first time, we asked coaches about value and credibility, and came up with some interesting answers.



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### Creativity

One-to-one coaching has given rise to 'coaching skills' training for managers and executives, and a new surge in coaching-based programs for teams. This presents huge opportunities for curriculum designers and practitioners alike.



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### Calls for Coaching

Requests for coaching are on the rise. Three out of four see an increase in the demand for coaching in the coming year. This time around, HR and training professionals are just as optimistic as coaches themselves.



In this report, we also explore:

- § regulation and licensing for coaches.
- § a coming revolution in communication technology.



And, for the first time ever, we will have an extended version of this study available on the web: more topics, additional insights and commentary at [www.sherpacoaching.com/survey.html](http://www.sherpacoaching.com/survey.html)

# Sherpa Coaching Survey

## Executive Summary

It's 2012. This is the seventh annual Sherpa Executive Coaching Survey. Here's what we have for you:

HR, training and business professionals believe in coaching. It's about value. More than nine in ten professionals see the **value of coaching** as 'high' or 'very high'. It is also about credibility. Over eighty percent see the **credibility** of coaching as 'high' or 'very high'.

More, more, more. Last year, most coaches were optimistic about **demand for their services**. This year, clients are joining in their optimism. Seven out of ten executive coaches and those who hire them say demand is going up. Life and personal coaches are optimistic, as well. In our survey sample, every buyer of coaching services sees demand going up in the next year.

although around believe business **coaching** demand design  
development dozens eighty **executive** going hr important  
leadership life majority managers market mode nine optimistic people  
percent person plans practice **process** professionals  
programs published regulations routine scope services  
sherpa significant **skills** sp specific standards startup  
**summary** ten third training transition twenty  
value year

The philosophy of coaching is spreading in scope and becoming part of many leadership training programs. In recent years, managers and executives have been learning **coaching skills**. One in three respondents already have significant programs in place to teach coaching skills to managers and executives, while almost as many have programs in startup or design mode. More than one in four offer coaching-based programs for teams, while others have programs on the way.

Two years ago, people being coached as part of **routine leadership development** constituted a majority for the very first time. The trend continues, as the majority of coaching is designed for improvement rather than correction or transition. Those who receive coaching for a specific problem or to ease a transition stand even, at around twenty percent each.

Four in ten coaches say they do not favor **standards of practice for coaching**, similar to the accounting or financial planning professions." On the other hand, nine out of ten HR and training professionals say a standard process is 'important' or 'absolutely essential'.

Only three in ten executive coaches follow a specific **published process**. Although dozens of processes are in use, two stand apart. CTI and Sherpa each have a twenty percent market share. No other process comes close.

In responses from around the world, not a single person is aware of **licensing or regulations**, nor plans for regulations. Even so, more than fifteen percent of executive coaches and twenty five percent across the board believe that executive coaching should be regulated.

# 2012 Sherpa Survey

## What is Executive Coaching, Anyway?

With thanks to our university sponsors, the Sherpa Executive Coaching Survey is a research project now in its seventh year. In this report, we study executive coaching, the ultimate in leadership development. You will discover how to make the most of coaching as a service for your organization, or as a career for yourself.

**Managers, executives, business and organizational leaders** will find the first half of this report of particular interest, all the way through the sections on standards of practice and coaching processes.

**Those in the coaching business** will find that the second half of this report gives them what they need to know about their industry, from the inside out.

It's not clear to everyone what executive coaching really is. Let's draw some lines. There are three broad areas of coaching: sport, personal and business-related coaching.

In business, there are two general fields of endeavor, commonly termed 'executive coaching' and 'business coaching'. At Sherpa Coaching, like many others, we work entirely in the realm of business behavior. We use the term 'executive coaching' to describe our work.

"Business coaching" has become a replacement term for consulting. For the first time this year, we created a new category for business coaches (working to develop client's knowledge and skills) in addition to our category for executive coaches (working on business behavior). This allows us to produce our clearest distinction ever between executive coaches, HR and training, consulting and other professional positions.

Here's our widely-accepted definition of executive coaching: "Executive coaching means regular meetings between a business leader and a trained facilitator, designed to produce positive changes in business behavior in a limited time frame." \*

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This definition clarifies:

- who coaches are: trained facilitators
- what coaches do: produce positive changes in business behavior
- when things happen: on a set schedule within a limited time frame

\* Definition from 'The Sherpa Guide: Process-Driven Executive Coaching' (Thomson/Cengage 2005), used by:

- § Action Coach
- § Coaching News
- § European Foundation of Management Development
- § Executive Coaching Summit Australia
- § Leading Coaches Center
- § Organization Development Journal

## 2012 Sherpa Coaching Survey Who Gets an Executive Coach?

Executive coaching is here to stay. The industry has come of age. For business leaders, having a coach is often seen as a status symbol. It can be the mark of someone being groomed for great things.

With that in mind, decisions about who gets a coach are important ones. The Sherpa Coaching survey has asked about the application of coaching resources for seven years. Who gets a coach? Our research has shown massive changes from year to year. What's going on in 2012?

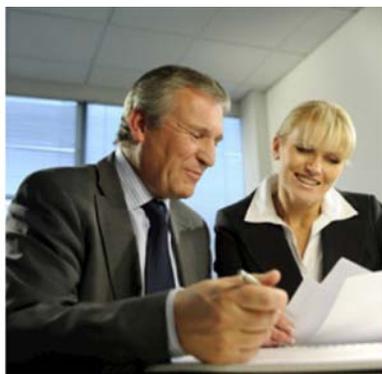
Ideally, anyone in a leadership position would benefit from coaching and the improved business behavior it produces. Things aren't always ideal. The state of the economy affects the ways coaching is purchased and used. Budgets will always limit the amount of money spent on coaching. Smaller budgets, fewer dollars. When money is tight, organizations start to reserve coaching for top-level and senior managers.

Up until 2008, lower-level management received a larger share of coaching services each year. Senior managers and execs were 'sharing the wealth'. Three years ago, we noticed a slight trend back toward coaching reserved for senior managers and execs, and offered: "If this is a function of tight budgets and a lean economy, we'll see further changes in the coming year."

Two years ago, the number of organizations who allowed people 'at every level' to participate in coaching dropped sharply.



Last year, our 2011 report. The trend reversed. Budgets eased up. We saw recovery. Money flowed at all levels in the organization once again. Then, the bottom fell out.



From The University of Georgia Center for Continuing Education  
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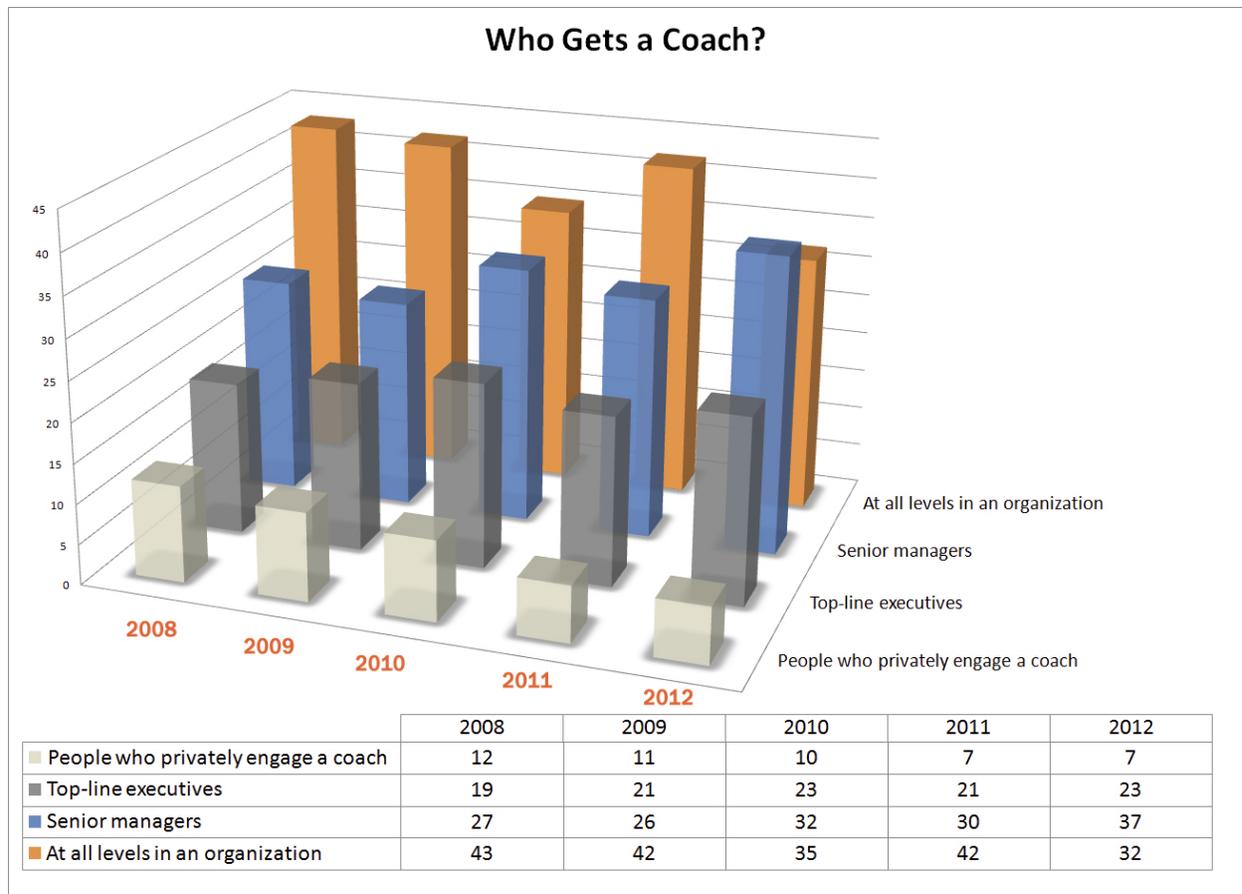
Here in our 2012 report, we are seeing a second bottom, what is sometimes called a “double dip.” The change is the largest shift in coaching history. A massive re-allocation of resources made sense in 2008-2009, when the stock market and housing market went into simultaneous collapse.

Budgets were based on real fear, caused by real events. This second, larger shift seems to be caused by the same thing: fear and uncertainty. But this time, the retrenchment comes amidst an improving economy.



Here’s what’s going on: The number of organizations limiting coaching to top-line executives and senior managers has hit a second peak. The trend toward organizations paying for coaching “across the organization” is in a second valley, at all time lows.

### Who gets a coach? 5 year trends



# 2012 Sherpa Executive Coaching Survey

## Why Spend Money on Coaching?

Why does coaching work? How do people make use of coaching? What do clients and customers expect from their executive coaches? The Sherpa Coaching survey has tracked the reasons people use coaching for seven years. In this report, we'll tell you about trends and changes in what people want from coaching.

Some people know exactly what they want. Others aren't sure when to call in a coach. A leading coach recently told us: "People call a doctor when they're sick. People call a mechanic when their car breaks down. But when a team or an organization is being crushed under the weight of bad business behavior, people don't always know they are supposed to call an executive coach. In time, that will come."

The time is coming. Almost every HR and business leader sees real value in coaching. Coaching has been used to solve specific behavioral problems, to assist in transition and to develop 'up and coming' leaders.

In the early days of coaching, an executive who wasn't living up to expectations was the most

likely to be assigned a coach. There was a certain stigma attached to coaching: "You have a coach. You must be having some problems."

For seven years, the Sherpa survey has asked coaches, HR professionals and coaching clients to share the ways they saw coaching used. There's a clear trend. More coaching is now devoted to developing upcoming talent, and a smaller share of coaching is designed to address specific problems.

As a result, having an executive coach can be a status symbol, the mark of an up and coming leader being groomed for greater possibilities: "You have a coach. You must be something special."

In 2012, the majority of coaching is designed for leadership development, with the balance of coaching split pretty much equally between transition and problem solving. That applies equally to companies of every size. Over seven years' time, the amount of coaching used to solve a specific behavioral problem has dropped from 40% to near 25%.



Imagine a workplace where everyone communicates well, expectations are always clear, and accountability is a good thing. You can have that, starting today.

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*We wrote the book*  
on executive coaching, our text at eight universities.

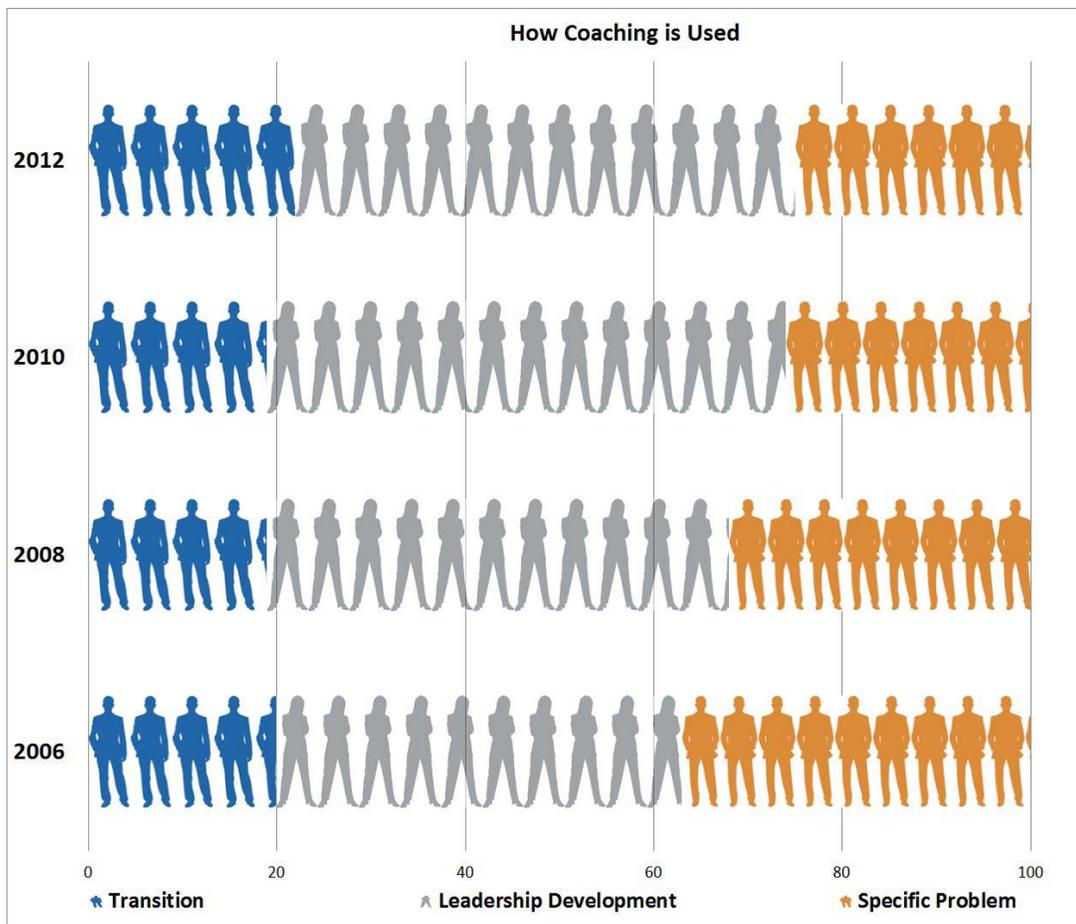
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Over the years, coaching has shifted away from problem solving (orange color key) and toward pro-active leadership development (gray color key). Here you have six years' worth of data, with the latest figures at the top of the chart.



No matter why coaching is brought to bear, the results are pretty much the same. Coaching helps people in three ways:

- First, a coach allows leaders to reflect about their decisions, and about themselves.
- Second, people usually avoid difficult truths. Coaching brings reality front and center.
- Third, people don't know how to change. A coach can guide a client to find replacements for behavior that's not working.

One coaching client describes the benefits of coaching as: "Immensely huge. I can't put a dollar amount on what it has meant for me. This has changed my life."

An executive, asked if coaching produced benefits, said: "Absolutely. My operations VP, as an example, struggled with our recent transition. I have seen a different leader, as has his team. This will lead to solid business results."

## 2012 Sherpa Executive Coaching Survey

### Coaching Skills and Team Coaching

What's new? What's different? What's working? In last year's sixth Sherpa Coaching Survey, executive coaches commented on two new trends in leadership development: team coaching and coaching skills training for managers. We promised to follow these topics starting this year. Here's a quick look at what we can report:

Full-time executive coaches are not the only source of coaching. Now, managers, executives and supervisors are increasingly expected to coach through behavioral issues. In coaching skills programs, leaders learn how to improve working relationships to increase profits, morale and teamwork. These programs are a relatively new concept.

Coaching isn't exclusively one-on-one. Teams can be coached, too. The intent of team coaching is the same as with an individual: to guide the team to realizations about their behavior or

performance, to enable them to make their own improvements and to make those changes sustainable over time.

Leading a program in coaching skills or a team coaching exercise is clearly not training. It is different from consulting. These programs place new demands on program leaders. These programs require new skills. The facilitator in these programs must truly be a coach. That is a much more intense, demanding role than that of a trainer.

As these programs become more common, we will have to address the same issues we do with individual coaching. Will facilitators use a published process? Will standards of practice emerge, or will team coaching and coaching skills be a 'hit or miss' proposition for many organizations?

Percentage of companies with:	Programs in place	Startup / design	No such programs	Do not know
<b>Coaching Skills</b>	<b>36</b>	24	29	11
<b>Team Coaching</b>	30	24	<b>34</b>	12

Coaching skills has been on the scene for a while. The concept is taking hold. Large firms, those with 100 employees or more, are teaching coaching skills far more often than smaller employers. Canadians, Americans and Australians teach coaching skills most often.

Team coaching is a newer concept. Large firms have not yet taken the lead in the design and development of team coaching.

Executive coaches, both internal and external, are presented with a rather large opportunity. They seem to be taking advantage of it.

- § 42% of coaches have established coaching skills programs.
- § Only 34% of HR & training professionals do.
- § 35% of coaches offer established team coaching programs.
- § Just 29% of HR and training professionals do.
- § Male and female coaches offer these programs in equal numbers.

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Veteran coaches are more likely to have established team and coaching skills programs.

Percent of coaches active in:	Under 1 year in business	1-2 years	3-5 years	6-10 years	10+ years
<b>Coaching Skills</b>	<b>23%</b>	<b>28%</b>	<b>33%</b>	<b>39%</b>	<b>53%</b>
<b>Team Coaching</b>	<b>19%</b>	<b>20%</b>	<b>29%</b>	<b>35%</b>	<b>43%</b>

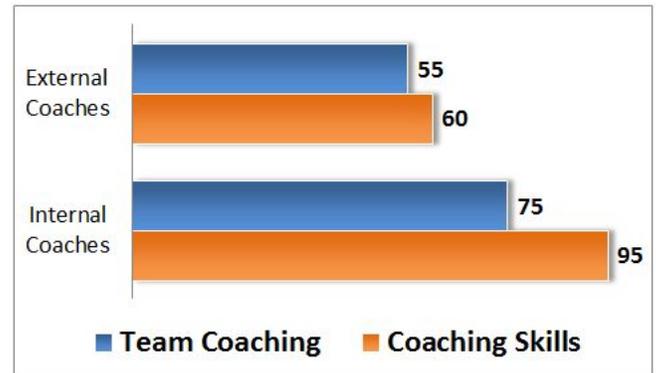
In related fields, fewer than 30% of business coaches offer these programs. Only 15% of life and personal coaches do.

External coaches who offer coaching skills and team coaching programs are also the coaches who charge the highest billing rates. Among coaches who charge \$300 per hour and more, 70% offer team coaching and coaching skills programs. Among coaches who charge less than \$300 per hour, 55% or fewer have such offerings.

Internal coaches have been working on this more than externals: 95% of internal coaches have coaching skills either in place or in design mode. 75% of internal coaches are working with teams.

In our special web report on internal vs. external coaches, you'll see a detailed breakdown that shows established programs, and programs in startup and design mode.

[www.sherpacoaching.com/survey.html](http://www.sherpacoaching.com/survey.html)



# 2012 Sherpa Executive Coaching Survey

## The Value and Credibility of Coaching

Executive coaching suffered an identity crisis in its early days, often confused with life coaching, counseling, consulting or training. Now, there are best selling business books, training programs and organizations dedicated exclusively to executive coaching.

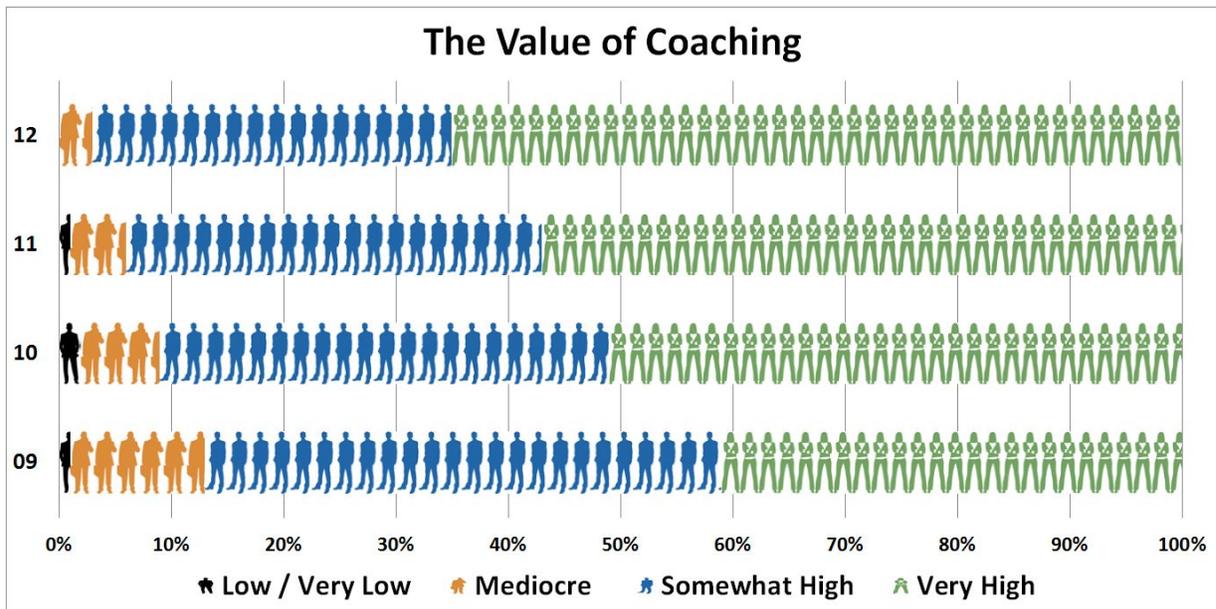
Clarity about executive coaching allows for legitimate conclusions about its value, and serves to build its credibility.

In 2012, we can say: Executive coaching has arrived. Since we first started collecting data, both the perceived value and credibility of executive coaching has risen every year.

Momentum has clearly swung in favor of coaching, as the number of people who see the credibility of coaching as 'very high' is on a fast track, showing geometric increases. This year, among non-coaches, the number of people who see the value of coaching as 'very high' broke thru the 60% mark, an all-time high.

Those who see the value of coaching as 'very high' (green figures) reach an all time high. Negative evaluations have virtually disappeared in the last few years. Few skeptics remain. Our latest info for 2012 is on the top line.

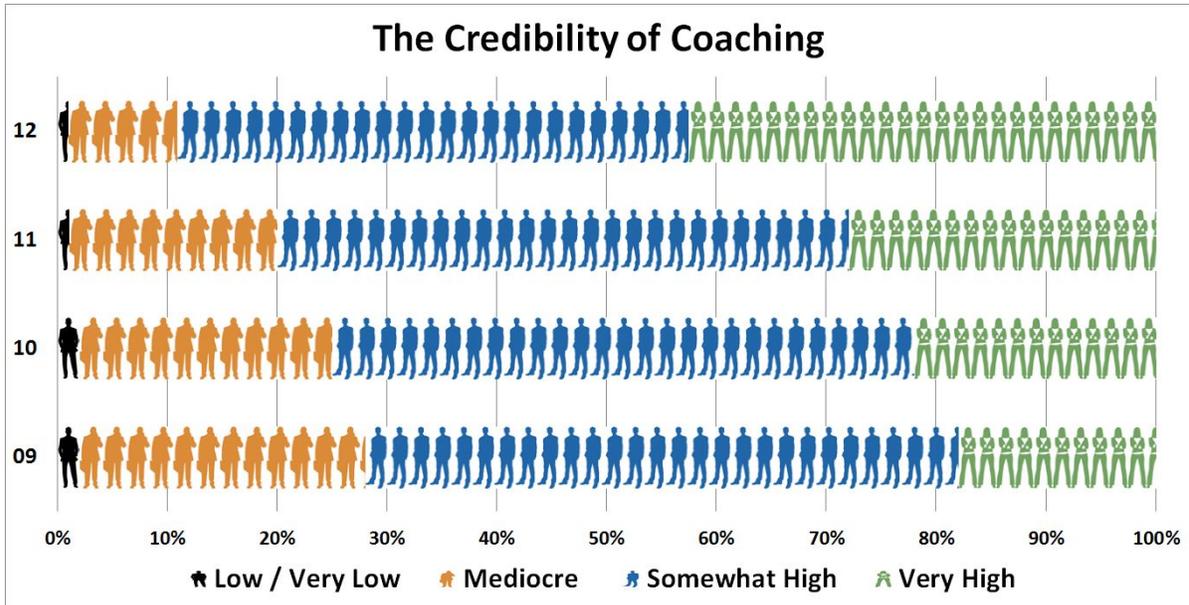
Coaching is here to stay.



VALUE

Credibility: Just like the value proposition for executive coaching, the credibility of coaching is at an all time high.

Those who say the credibility of coaching is 'high' or 'very high' jumped from 80% to 90% in the past twelve months. Coaching has come of age.



# CREDIBILITY

Compared to just three years ago, the number of people who see the credibility of coaching as mediocre or worse has declined sharply, dropping from 28% to 11% .

This year, we asked coaches about the value and credibility of their craft for the first time.

The value proposition: 91% of executive coaches see the value of coaching as 'very high', as do 80 % of business and life coaches and 63% of HR and training professionals.

Believability: Executive coaches rank the credibility of coaching as 'very high' (44%) or 'somewhat high' (49%). HR and training professionals give similar marks for credibility ('very high' (38%) and 'somewhat high' (47%). In other words, 93% of executive coaches see the credibility of their craft as high, while 85% of the people who might hire them agree. Coaching is here to stay.

**Give it time**

Australia has more coaches per capita than any other country\*. Coaching is fully developed as an industry. It's probably not a coincidence: The credibility of coaching is higher in Australia than anywhere else on the planet.

\* The State of Coaching Across the Globe,  
Frank Bresser Consulting, 2009

It's 2012. We can call it a watershed year. Coaching truly is a permanent part of organizational development. Executive coaches are becoming trained and certified in record numbers. A larger percentage of the coaching trade is made up of seasoned veterans. The adoption of published processes creates consistent results.

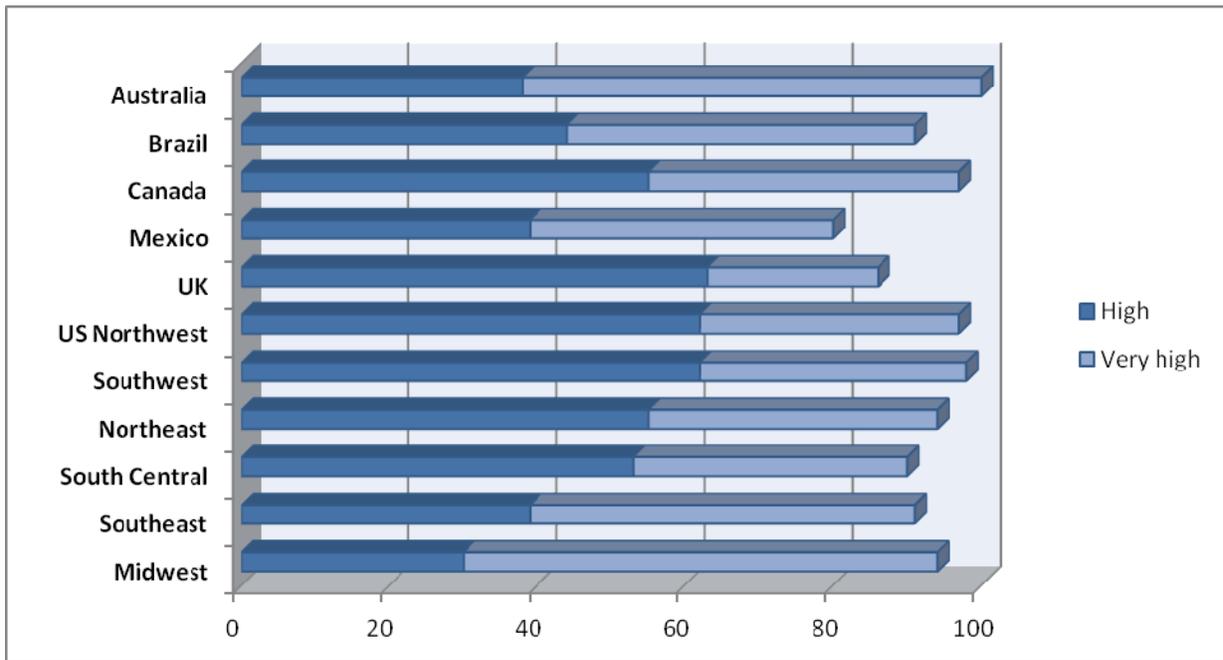
Experimental and 'edgy' coaching has largely disappeared from the scene. As all this happens, everyone agrees that value and credibility are on a steady rise. There's little improvement left to be had for the perceived value of coaching, just a little ground to be made up in terms of credibility.

Here's the way respondents rate the credibility of executive coaching, by region.

Australia, on the top line, has a perfect 100% score. Other countries in our poll and regions in the USA show that coaching is reaching the status everyone has been hoping for.

The Western USA shows slightly more confidence in the coaching industry than other parts of the country.

The credibility of coaching ranks high, especially in Australia, where we tallied a 100% approval rate.



# CREDIBILITY

## 2012 Sherpa Executive Coaching Survey Putting it Out There: Service Delivery

Coaches can deliver their services in person, by phone, text, chat, email or videoconference. In this, the seventh annual Sherpa Executive Coaching Survey, we have taken a fresh new look at service delivery, and even rewritten our questions to change with the times.

We have asked two questions over a seven-year span: How is coaching delivered, and which method is the most effective. We have not provided any definition for the word ‘effective’,

so we can get a true reading on what people believe.

There has been a definite trend. Over the years, coaching has been delivered in person more frequently. The change has been gradual. Six percent of executive coaching has shifted from phone to face-to-face since we started collecting data in 2005.

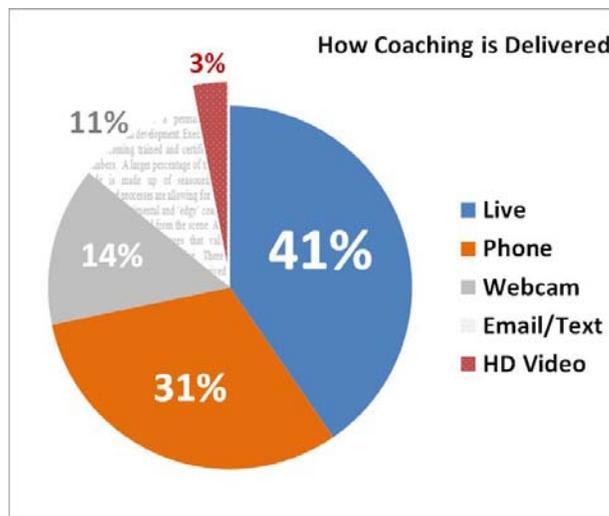
Technology is becoming a factor, as well. Video conferencing is gaining a share of the coaching landscape. Internet-based video has its limitations, but high definition systems are becoming more widely available, especially to internal coaches at larger firms.

has added another option for coaching, that of point-to-point video.... Over time, the quality of sound and images will only improve, making coaching over the Web more and more like a live meeting.”

At Sherpa Coaching, our author/educators have always advocated face-to-face coaching. However, we predicted the advanced technology that now makes remote coaching the next best thing. In their 2005 book “The Sherpa Guide: Process-Driven Executive Coaching”, Brenda Corbett and Judith Coleman wrote: “Technology

This year, we separated high-definition videoconferencing from webcam applications such as Skype. In years to come, we’ll be able to monitor the adoption of technology in coaching.

Overall, here’s what people said when asked how coaching is “often delivered”:



HR and Training professionals

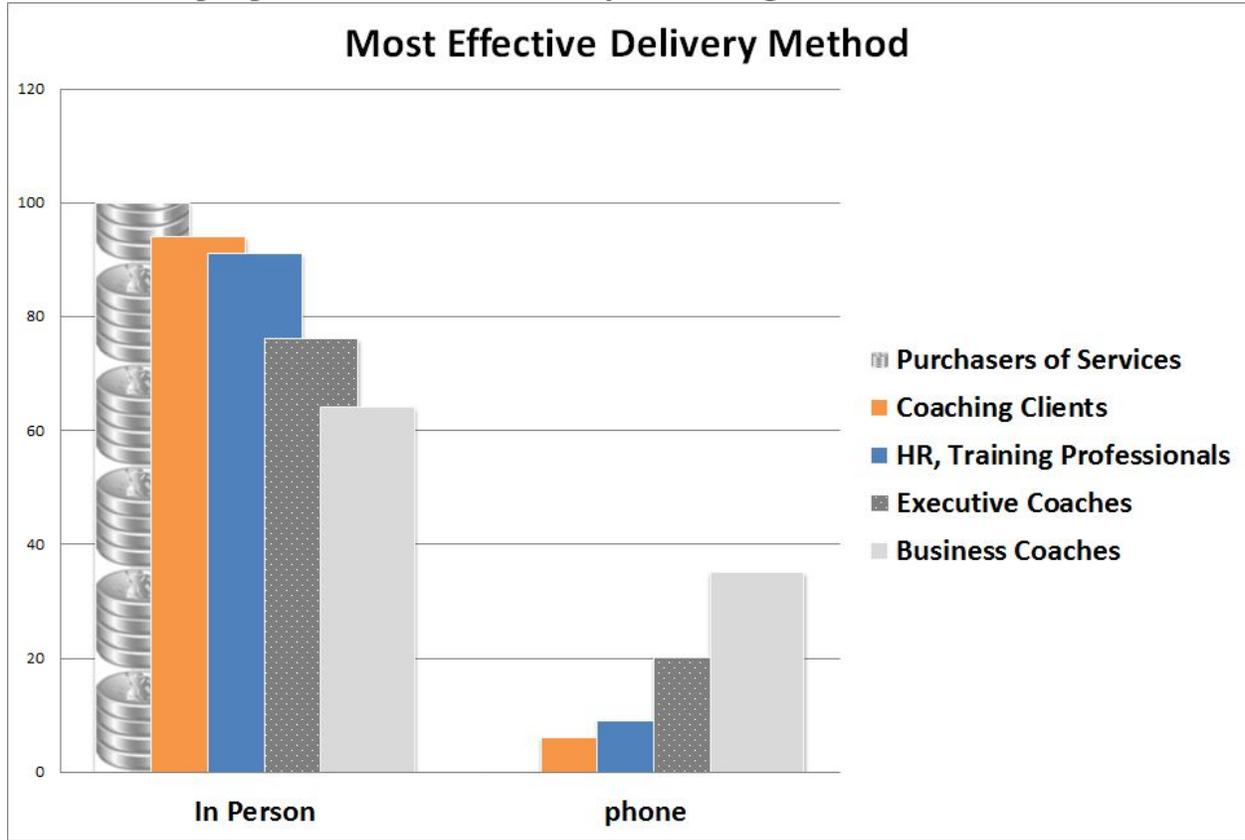
mentioned

d HD video at a higher rate (9%) and webcam coaching at a lower rate (6%).

Regardless of how services are delivered, what do people think is best? It depends on how you

define the word ‘effective’. We leave that to our respondents. Effective might mean better communication. It might mean more convenient or efficient. Different groups of people have very different opinions.

Here’s what people told us about the ways coaching services are delivered:



Preferred delivery methods	HR, training	Clients	Purchasers	Executive coaches	Business coaches	Life coaches
In person	91	94	100	76	64	54
Phone	9	6	0	20	35	42

Whether we look at ten-year veterans or coaches in business six months or less, all favor in-person delivery. Newer entrants to coaching show a slight preference for video conferencing over use of the phone for coaching.

Overall, around 30% of coaching is by phone, and over 15% by webcam or video conference.

As live, high quality video becomes widely available, it will start to overtake other delivery methods.

Top-level coaches report that high definition video can be “just like sitting across the table from my client.”

Across all dollar ranges, coaches use phone, video, in person and alternates in the same proportions. The most successful coaches, those billing \$500 an hour or more, grant the superior effectiveness of live meetings at an 80% rate, compared to 70% of all other coaches.

When it's all said and done, what works for the client works for the coach. Two coaching clients reported on their experience, one saying:

*“Didn’t like having the sessions over the phone. Got a lot more out of the face-to-face meetings.”*

while another said:

*“The occasional phone meetings seemed to be as effective as face-to-face meetings.”*

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# 2012 Sherpa Survey

## Executive Coach and Business Coach

There are too many kinds of coaches to count. This, the Sherpa Executive Coaching Survey, has an obvious focus. Over our seven years of research, we have made best efforts to make sure our results match our mission.

This year, we took additional steps to keep things sorted out. Knowing that coaches offer a wide range of services, we made a new distinction in this year's survey. Coaches participating in this year's survey were asked to identify themselves as:

- executive coaches, those who work on business behavior, or
- business coaches, who help clients develop knowledge and skills.

The distinction helps us produce the most accurate results we have ever had for executive coaches, and report on an often neglected business segment for the first time. Analyzing responses from years past, it appears that business coaches in our earlier research usually identified themselves as 'other professionals'.

We have found one thing in common between the two: executive and business coaches are equally optimistic that demand for their services will increase in the coming year.

In many ways, the two groups lead different professional lives. Here's a sampling of what we found.

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### Demographics:

Business coaches are slightly older. 55% of them are at least 56 years of age, while only 44% of executive coaches are that old.

Women are the majority in executive coaching. 55% of executive coaches are female. Men have a slight edge in business coaching. 52% of business coaches are male.

There are fewer veteran business coaches and more new entrants, compared to executive coaches. In startup mode, just 10% of executive coaches have been in business for 2 years or less. 24% of business coaches are that new to the game.

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An extended version of this survey, with additional topics and more detailed commentary, is available online at [www.sherpacoaching.com/survey.html](http://www.sherpacoaching.com/survey.html)

Note: As a courtesy to life coaches who took part in our survey, we will report on their responses separately. Life coaches will be able to download a free report along with the general release of our survey, on or after January 25, 2012.

## The Market:

Business coaches cater to small and mid-sized companies. Executive coaches typically work with, or are employed by, larger firms.

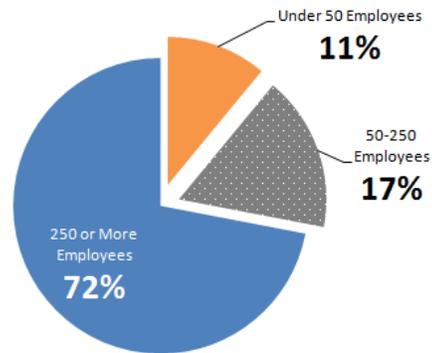
Here's a breakdown that shows a dramatic difference:

Executive coaches are charted up top,  
Business coaches' data is below.

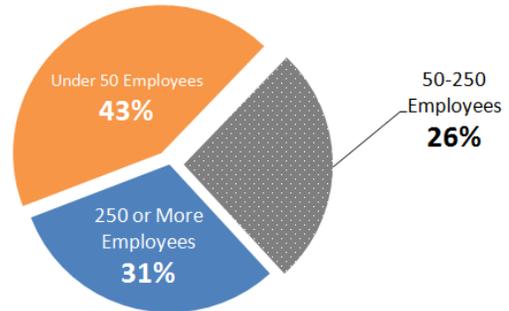
Small client companies (0-49 employees) are shown with the orange color key.

They are a small part of the executive coaches' world (11%), a big factor in business coaching, (at 43%).

### Executive Coaches



### Business Coaches



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## Practice:

Compared to business coaches, executive coaches charge more for services. 35% of business coaches charge an hourly rate of under \$150 US. Only 15% of executive coaches charge at those lower levels.

Business coaches spend more time marketing and less time coaching. When asked how much of their time they actually spend coaching, most business coaches (52%) spend less than two days a week actually coaching. 64% of executive coaches spend more than two days a week providing services.

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## Service Delivery:

The work is different: coaching one person, especially with a process that has time limits, that's one thing. Working with a small business owner to improve skills, strategy and performance, that's another thing.

It is harder to predict the scope of an assignment in business coaching. Because the nature of their work is different, business coaches look for longer engagements.

24% of business coaches favor open-ended assignments. Only 14% of executive coaches feel that way.

Executive coaches work with their clients in person more often. Executive coaches report that 42% of their coaching is face-to-face. Just 37% of business coaches say that.

How are services delivered? Only 20% of executive coaches say the telephone is the 'most effective' way to deliver services.

35% of business coaches say the phone is most effective.

### Standards:

Despite the longstanding history of consulting, business coaches seem to sense more chaos in their line of work than executive coaches do.

28% of business coaches favor government regulation of their industry, as opposed to only 16% of executive coaches.

45% of business coaches see a need for a standard process, like those used in accounting or financial planning, while only 38% of executive coaches would agree.

In short, there are real differences between executive and business coaches and the way they do their work. We are delighted that this year, we are able to make a clear distinction between the two.

Only 20% of business coaches follow a published process, while almost 30% of executive coaches do.

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Questions? Managing Partner Karl Corbett can be reached at [kc@sherpacoaching.com](mailto:kc@sherpacoaching.com).

## 2012 Sherpa Executive Coaching Survey Certification and Training for Coaches

When the Sherpa Executive Coaching Survey started seven years ago, we asked about training for executive coaches. We have researched it ever since. As leading authors in the field, our founders are in the training business. We want to know more about it.

Over the years, we have released everything we know about training to everyone in the industry, competitors included, at no charge. We do this for the betterment of coaching, to create a better workspace for coaches and their clients. Here's what we can report in 2012:

There is still a wide range of training available, with varying levels of qualifications and

credibility. Change is frequent. Several popular directories include training programs and certifying bodies whose websites have been recently abandoned. Six months after our 2009 study on coach training, around 10% of the schools we studied appeared to be shut down.

Training is one thing. Certification is another. All the certifying bodies in coaching are self-proclaimed. Some schools certify their own graduates. A half-dozen trade associations certify training programs. Some will certify coaches who have no professional training whatsoever.

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None of the certifying bodies in coaching have their certification processes approved by independent authorities. As a result, neither university-based programs nor private schools have been accredited by a qualified organization whose process is subject to outside scrutiny.

Despite it all, most executive coaches have been classroom trained and certified. Overall, 74% of executive coaches cite classroom training and certification, up by ten percent from the levels of three years back.

62% of veteran coaches, those in business ten years or more, are classroom trained and certified, compared to 77% of all other coaches. They started their careers before training and certification was looked upon as a necessity.

How important is training? Across the board, every type of coach: executive, business and personal, says training and certification is 'absolutely essential' or 'very important' by an 80 – 20 spread. Training, HR and other professionals weigh in at the same 80 to 20 margin. Among purchasers of coaching and coaching clients, a small sample in this year's survey, 100% say it's either 'essential' or 'very important'.

A CEO in the Midwest told his coach: "I was skeptical about bringing in a coach. I didn't want to hire someone who has just read a book. At least some formal training is a requirement."

There is no central body or licensing authority that evaluates and endorses executive coach training programs. The International Coach Federation (ICF) is the most widely recognized standard, but is not universally accepted.

In addition to accrediting coach training programs, they offer certification to individual coaches, many of whom have attended an ICF accredited school. Under most arrangements, it is the job of a school to certify its own students. It is unusual for an accrediting body to pass judgment on both schools and their students.

Individual universities endorse and offer training programs, but their offerings vary. Some

universities use their own professors and local coaching talent to create a unique offering. Others turn to published authors for content and delivery.

Even when multiple universities endorse and offer the same program, they are not necessarily selecting the program for the same reasons. Universities do not collect fees for evaluation and endorsement of programs. They do make money by selling seats in the programs they select or create.

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In our overall results, the ICF is still favored as ‘most qualified to certify a training program for coaches’, given their long history. In our top 20 metro areas (US and Canada), The ICF beat

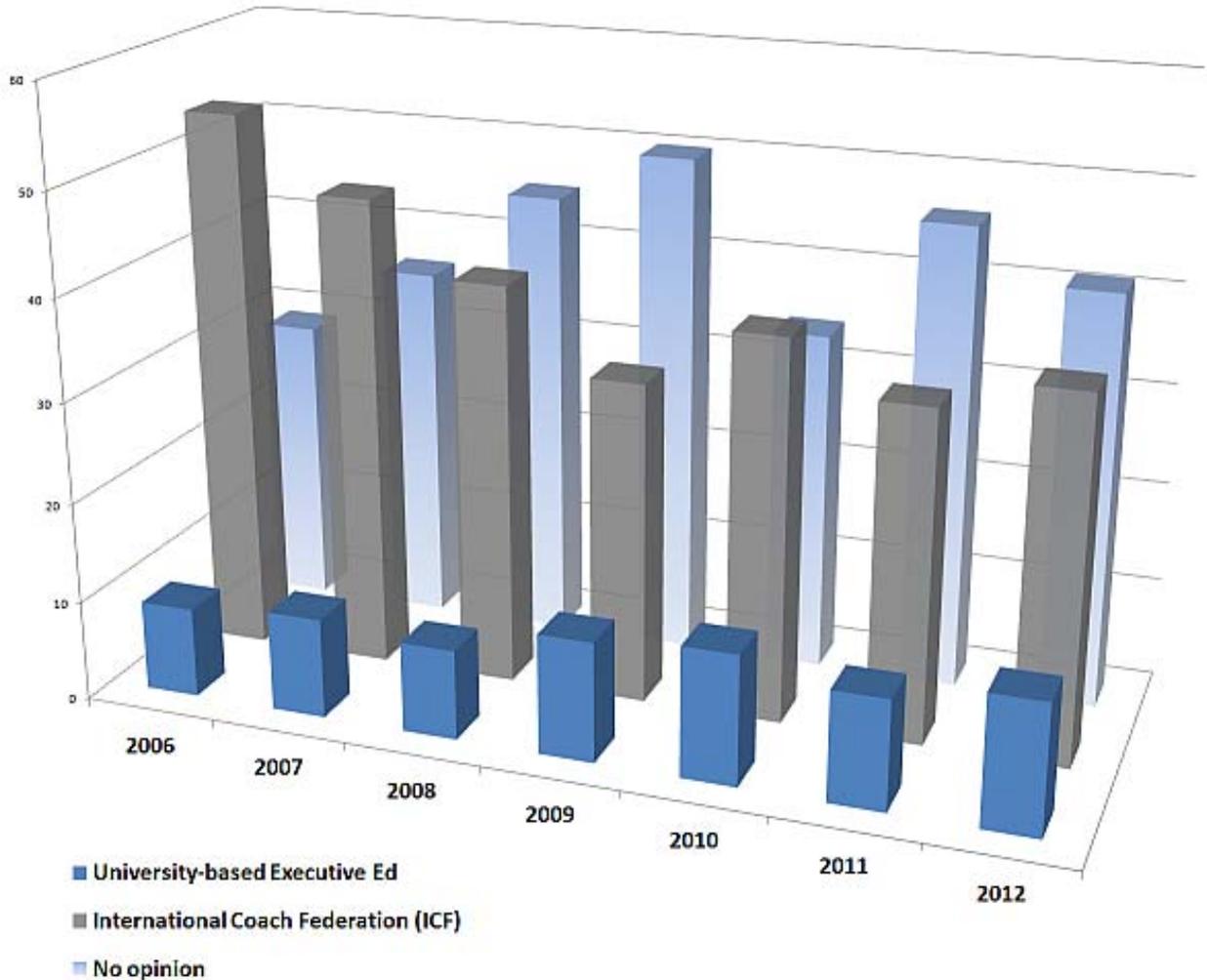
university executive education in all but one place: New York City coaches favor a university brand. HR and training professionals favor university-based programs by a 55/45 margin.



### **Comment from a Coach**

“Brief rant: Many coaching organizations are self-created and a great source of income for their founders. It would be refreshing to see a non-profit, independent body provide information on what constitutes a qualified executive coach.”

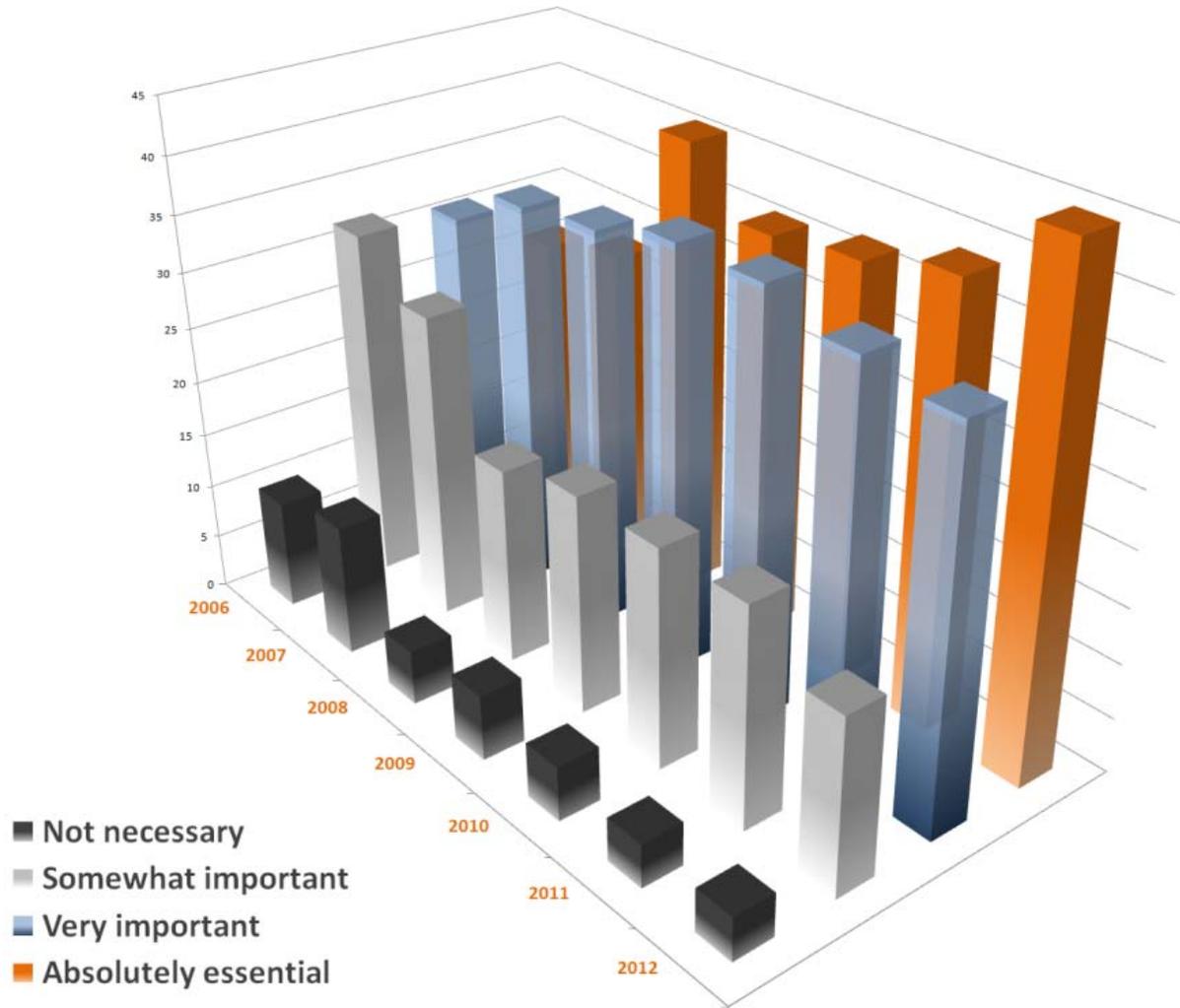
Preferences for certification authority:



There are divisions among executive coaches.

- § Internal coaches heavily favor university endorsement of coach training programs.
- § Externals favor the ICF's endorsement.
- § Mid-level earners, in the \$150-\$300 per hour range, favor the ICF's endorsement by a 6 to 1 margin.
- § Top coaches, those charging \$500 per hour or more, are twice as likely to favor university-endorsed programs.

## Formal certification for executive coaches: Do we need this?



For years, we have asked "Who is most qualified to certify coach training programs?" At the suggestion of participants, we have asked for opinions about quite a few trade associations.

Thus far, our responses have been mainly from the USA, Canada and Australia, so European groups are at a disadvantage.

Overall, only three choices have garnered as much as 5%: The International Coach Federation, university-based executive education and the ever-popular 'no opinion'.

The opinions of executive coaches mirror the overall sample very closely.

# 2012 Sherpa Executive Coaching Survey

## Standards of Practice

Coaching is a complex endeavor. Over the years, the Sherpa Executive Coaching Survey has asked about standards of practice, published processes, measuring return on investment, and any number of topics which might shed light on the art and science of coaching.

Quite honestly, we don't look for any particular answer. We do think it's important for the industry to develop as quickly as it can. That happens when people have access to information about what works and what doesn't.

Three years ago, we asked: "Will executive coaching go the way of accounting and financial planning, with formal guidelines for service

delivery, or will coaches be free to come up with their own ways of delivering services?"

The answer lies somewhere in the middle.

- § Coaching is in different stages of development in different countries.
- § There are dozens of trade associations.
- § There are differing philosophies: working on strengths vs. working on weaknesses being a major divide in the industry.
- § There are competing training programs. Several are taught by published authors with a following outside their formal classroom offerings. Most are not.

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In other words, no governing body, no philosophy, no school or process, no association, it appears, will ever have the authority to impose standards on coaches.

If any standards of practice emerge, coaches themselves will decide on them and follow them, independently.

---

Even without any central authority directing coaching activity, we do see common practices becoming standard practices.

Another move toward standards of practice has been customer driven. Five years ago, 30% of coach/client meetings were scheduled 'as needed', and almost 30% of engagements were open-ended. That's great for coaches. However, 'open-ended' and 'as needed' might not fit into a budget, or a strategic plan.

The biggest move comes in the use of assessments in coaching. Two years ago, 92% of coaches used an assessment to help with their coaching. Last year, that number went up, with 96% of our coaches reporting use of an assessment. This year, 99% of all coaches report using an assessment. That's a big change. That is a new standard of practice created by coaches working independently, learning from each other, joining communities and networks and improving the way they work.

Coaches are responding, and new standards of practice are being created in the process. Open-ended engagements and meetings scheduled 'as needed' now make up less than 20% of the business, and under 5% at larger firms. Coaches are adapting a common way to deliver service based on what the market wants. It's working.

For a number of years now, debate has continued over whether coaching can become, or should be considered, a profession.

Our conclusion: Coaching does not currently have any universal criteria and therefore cannot be considered a formal profession. It is a business activity, an industry, which matches only the broadest definitions of a profession.

Based on industry trends we have captured and analyzed since 2005, we conclude that there are not, and there will probably never be published standards of practice or processes that executive coaches must follow in order to be considered a coach.

**What constitutes a profession?**

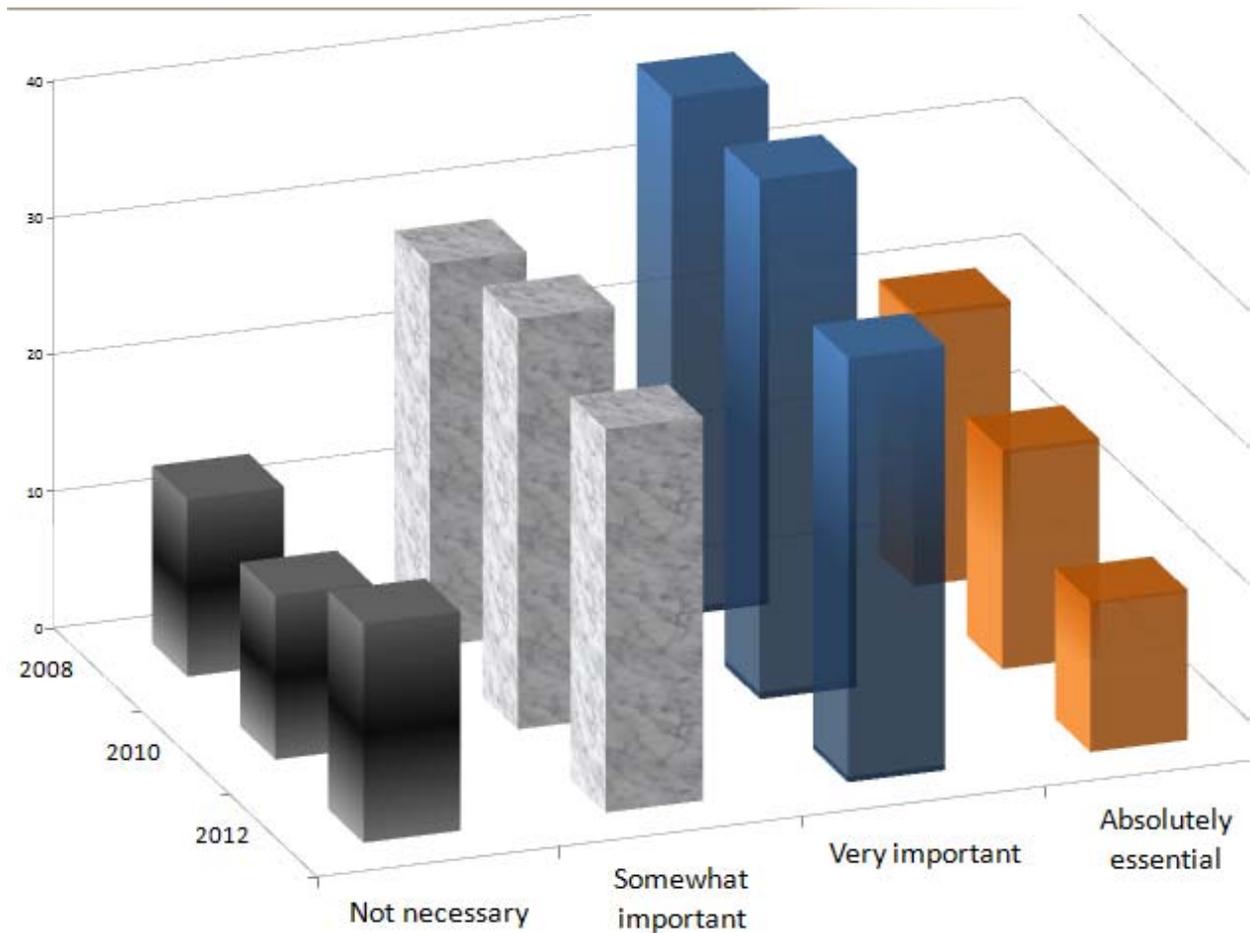
“The terms profession and professional refer to a body of practitioners who meet the formal criteria of an occupation, as in (e.g., medicine, law, psychology, etc.).”

*From Standards Australia: Coaching in Organisations*

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A recognized standard of practice for executive coaching is?

(All respondents, data from 2008, 2010 and 2012)



# 2012 Sherpa Survey

## Executive Coaching Processes

If a coach follows a published process or a set of guidelines for their practice, it's strictly voluntary. Do coaches take each client as they come, or do they have a well-documented process that can apply to every client's needs?

The largest number of coaches, around 40% of the field, says they "develop a unique approach from client to client."

In pretty much equal numbers, other coaches have "developed my own process for coaching" (30%) or "follow a published process" (30%).

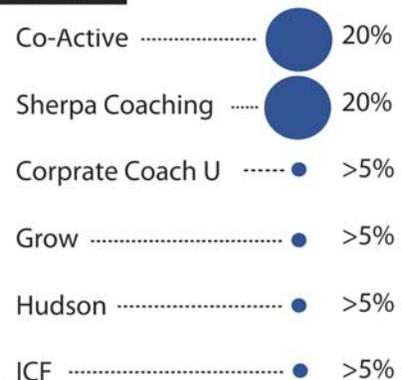
There is apparent movement towards published processes, with responses moving up from 28% last year and 21% the year before.



So, which coaches follow a published process?

- § Veteran coaches, those in business 6 years or more, don't tend to follow a published process as often as less-tenured coaches.
- § Newer entrants into the field, coaches in business 2 years or less, tend to rely on their own process for coaching, according to our latest information.
- § The 'sweet spot' for process-driven coaching is among coaches who have been in the business three to five years. The majority of them (52%) follow a published process.

### Coaching Processes:



\*Data taken from the 2012 Executive Coaching Survey, thirty six additional processes were mentioned, once each.

Among processes mentioned in our responses, two have meaningful market share. For the third year, the Co-Active process and the Sherpa process each earned slightly over 20% of all process mentions. These are not the only significant processes, however. Four other processes held a 5% share, with thirty six additional processes mentioned once.

Which executive coaches follow a published process?

11% of coaches who claim ‘personal experience’ as their background for coaching.

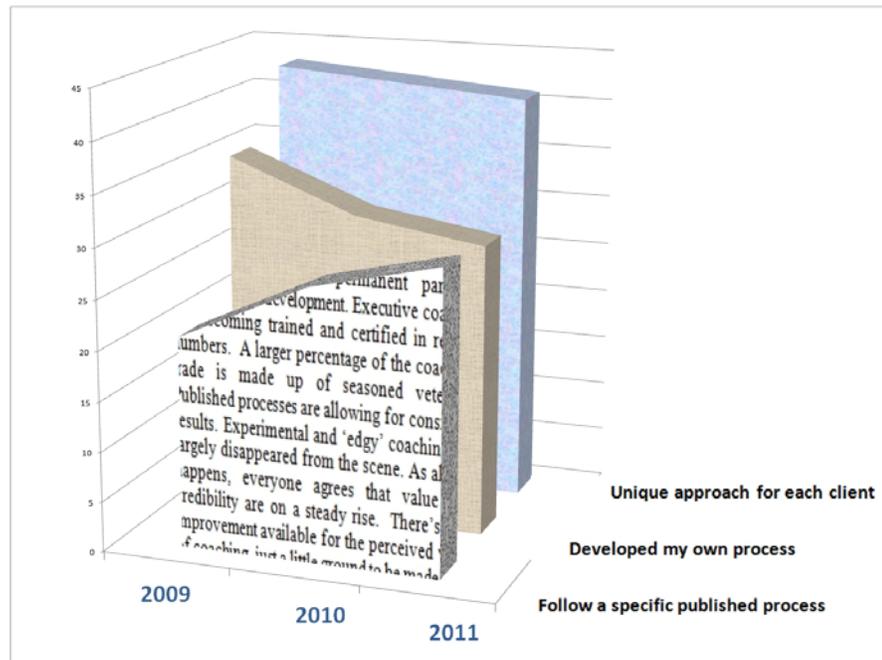
18% of coaches whose background is ‘formal education not related to coaching’.

23% of those who cite self study or online training in coaching.

32% of those who went through classroom training and certification as a coach.

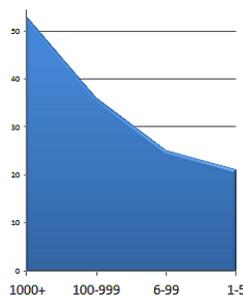
Do you base your coaching on a published process?

(Executive coaches, responses from 2010, 2011 and 2012 reports)



There is gravity at the high end of the spectrum for published processes. Larger firms create teams of coaches who are trained and certified together, and expected to create a common language and culture. Rather than allowing each coach to develop their own, they rely on published processes to deliver predictable results.

Their approach, we are told, is based on a simple fact: larger corporations and agencies are not in the business of writing a coaching process or curriculum. Coaching may support their mission, but coaching is not their mission.



The numbers bear that out.

Coaches in larger firms follow a published process more often.

53% of coaches in large firms (1,000+ employees)

36% of coaches in mid-sized firms (100-999 employees)

Just 20 - 25% in smaller firms

# 2012 Sherpa Executive Coaching Survey

## Licensing and Regulation

There is no movement toward unionization, regulation or licensing of executive coaches in the US. For the first time this year, we asked about licensing and regulation of coaching. Not a single example of regulation for coaching was submitted.

Overall, 50% say coaching should not be regulated at all. Another 25% feel the industry should be self-regulated. Among those who

would favor regulation for executive coaching, 16% of our respondents favor state licensing or regulation, 6% see a federal government role, 3% favor local control.



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In Australia, the Government offers a workplace training certification. Although this certification is not limited to coaching, some schools have managed to become what's called a Registered Training Organisation. That's a very acceptable way for coaching schools to 'back in' to a certification program. It is not a direct move by government to license or regulate coaching in any mandatory way.

The accounting and financial planning professions have detailed processes, practice manuals, laws and regulations that guide their work. Many favor the adoption of standards and government regulations for executive coaching, but that has not happened. This year, we can explain why. Coaching clients do not need to be protected by government from their coaches.

In the US, one attempt to regulate coaching was brought to our attention by a respondent who said:

*"I am a member of the team that added language to exempt coaches from Mental Health legislation in the state of Colorado (both 2005 and 2010). State legislatures create laws to protect those at risk in the population. Colorado determined that coaching clients are not vulnerable and do not need protection, thus no need to license practitioners. Business disputes can be reported to the Better Business Bureau."*

Despite the lack of regulations anywhere in the world, and the failure of attempts to regulate coaching, there are those who favor it. 19% of executive coaches and 30% of business coaches favor regulation by federal, state, provincial or local government. 20% of HR and training professionals, 24% of life coaches and 23% of other professionals call for regulation.

On the lower end of the pay scale, executive coaches who charge under \$150 per hour, three in ten favor regulation. Only 15% of coaches who charge \$150 or more per hour support regulation.

One American coach said: “Would like to see more self-regulation ... too many people without qualification are advertising themselves as coaches. “

Leaning toward the free market, a Canadian coach commented: “Anyone can call him/herself a coach. The market will determine if they should stay in business/practice.”

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# 2012 Sherpa Executive Coaching Survey

## Trends in Training

A few years back we asked: “Can coach training organizations continue to offer hundreds of different programs, many developed and offered with limited oversight or field testing?”

So far, the answer appears to be ‘yes’.

Peer Resources\*, a leading source of information on coaching and mentoring, lists over 300 currently active training programs for life, business and executive coaches.

\* [www.peer.ca](http://www.peer.ca). Membership optional, but recommended.

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Three hundred coaching schools. Considering the number of coaches entering the industry each year, a few thousand at best, there is not enough business to sustain any more than a fraction of the training programs currently on the market. Preliminary research indicates that as many as 10% of coach training programs go out of business each year. Dominant players will emerge. Lesser lights will fade.

Why do we say that lesser lights will fade? Not every coach training program seems destined to have universal appeal. Take a look at a few

business models for coach training, and let us know what you think:

- § An executive coach training program with a somewhat redundant message: “based on *mindfulness*, *sustainability*, intercultural and global skills, systems theory, neuroscience, *mindfulness*, and *sustainability*.” (Website abandoned)
- § Or, the quick fix: “Become a Certified Professional Life Coach in Just 16 hours!”



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Private training programs have been around for fifteen years. University-based training has been around for just half that time. There is a place and a market for both.

Almost half of all internal executive coaches are university trained, vs. 20% for external coaches. Internal coaches attend programs that feature more time with a live instructor, as well.

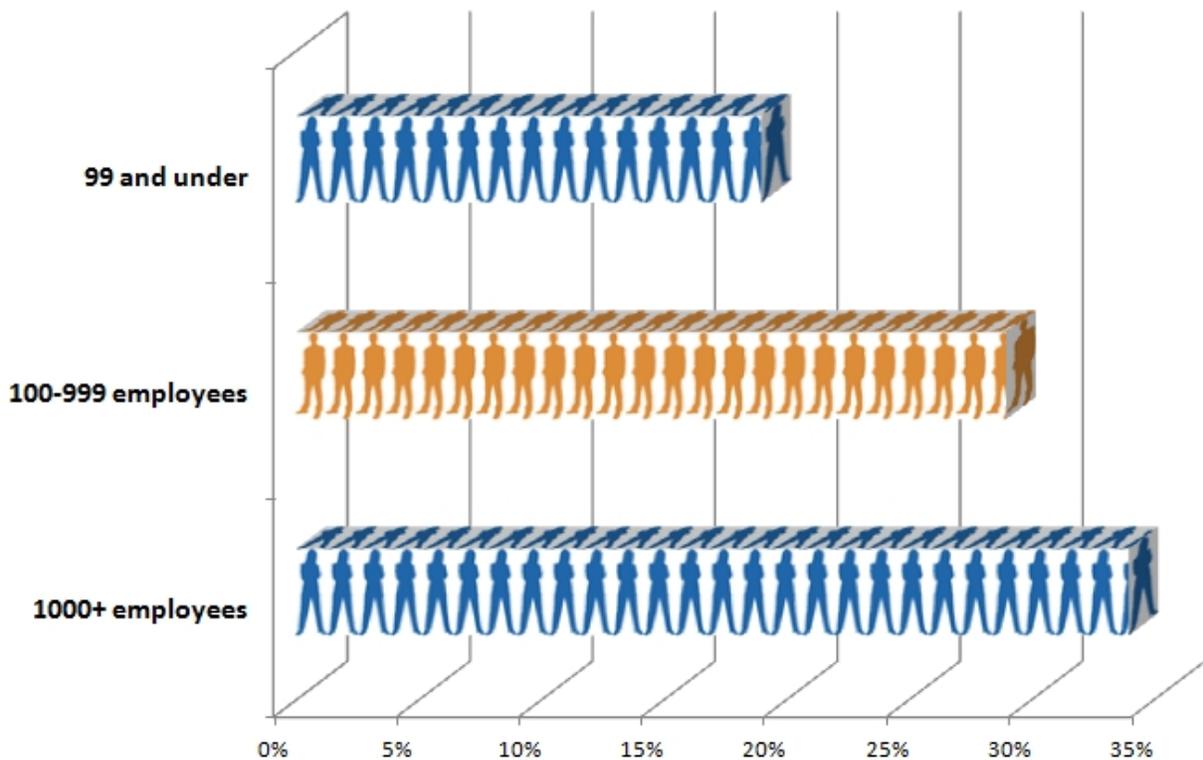
University training is becoming the standard for large companies and internal coaches.

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Larger firms tend to train their coaches together and select a training program for them. Among the very smallest firms, coaches choose their own training.

This results in business for both private schools and university executive education. The chart below shows how this works in the open market.

**Percent of coaches university trained, by company size (# employees)**



## 2012 Sherpa Executive Coaching Survey Length of Engagement

How long is this going to take? There is a wide range of opinion about how long an executive coaching engagement should last. Factors include the total number of meetings and how often those meetings take place.

Coaches who follow a published process are more likely to have built in time limits, but there's no guarantee. Many coaches "develop a unique approach" from one client to the next, which makes the open-ended engagement seem more likely.

HR and training professionals and the people who purchase coaching services favor engagements of 90 days or less. Executive coaches, especially external service providers, lean toward 90 to 180 days in duration.

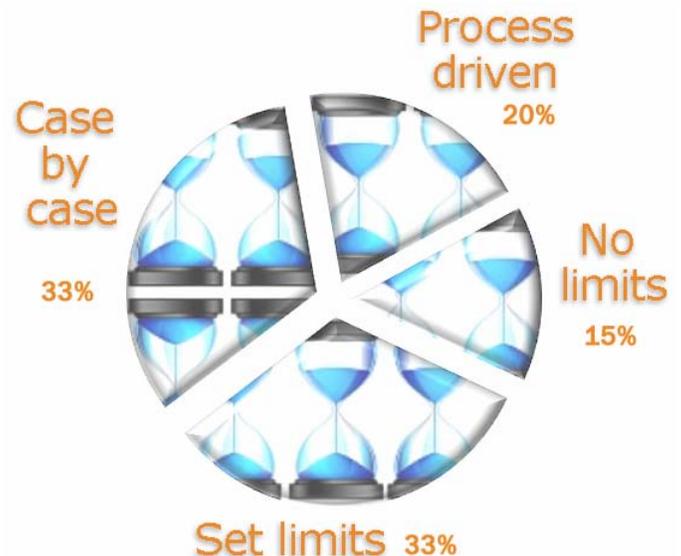
Sometimes, it's a matter of access and convenience. Internal coaches often work and meet on the same property as their clients (fellow employees). Internal coaches tend to opt for more frequent meetings, most often weekly. They also opt for engagements of 90 days or less.

External coaches usually meet every other week, and that makes for longer engagements.

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### Taking it to the Limit:

- § About one third of HR and training professionals prefer to set the length of a coaching engagement via "case by case decisions with no explicit limits."
- § Twenty percent opt for "a process that includes time limits", and
- § Another third want a set "length of engagement per person with additional negotiated terms."
- § Fifteen percent don't set any initial constraints at all.



Do different kinds of coaches have different approaches? Absolutely. Business coaches favor longer engagements than executive coaches do. Their work is different, however. It is harder to predict the scope of an assignment in business coaching, so business coaches look for longer engagements. 24% of business coaches favor

open-ended assignments, compared to just 14% of executive coaches.

Coaches and HR professionals at larger companies (1000 employees and up) favor coaching with a limited scope, 90 days or less.

Large firms also opt for weekly meetings. They tend to use internal coaches, who can meet more often with their clients.

Employees at mid-sized companies favor weekly meetings and a 3 to 6 month time frame.

Employees at the smallest firms, often executive coaches themselves, look for meetings every other week inside a 3 to 6 month time frame.

Ultimately, the customer is king. HR and training professionals want shorter engagements, more structure and limited scope. That is being reflected in the way service is delivered. Open-ended engagements and meetings scheduled 'as needed' come in at under 20% of the field, and under 5% at larger firms. That's down significantly from five years ago, when 30% of meetings were scheduled 'as needed', and almost 30% of engagements were open-ended.



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## 2012 Sherpa Executive Coaching Survey Assessments in Coaching

As part of the seventh annual Sherpa Coaching Survey, let's take a look at the way executive coaches and their clients use assessments.

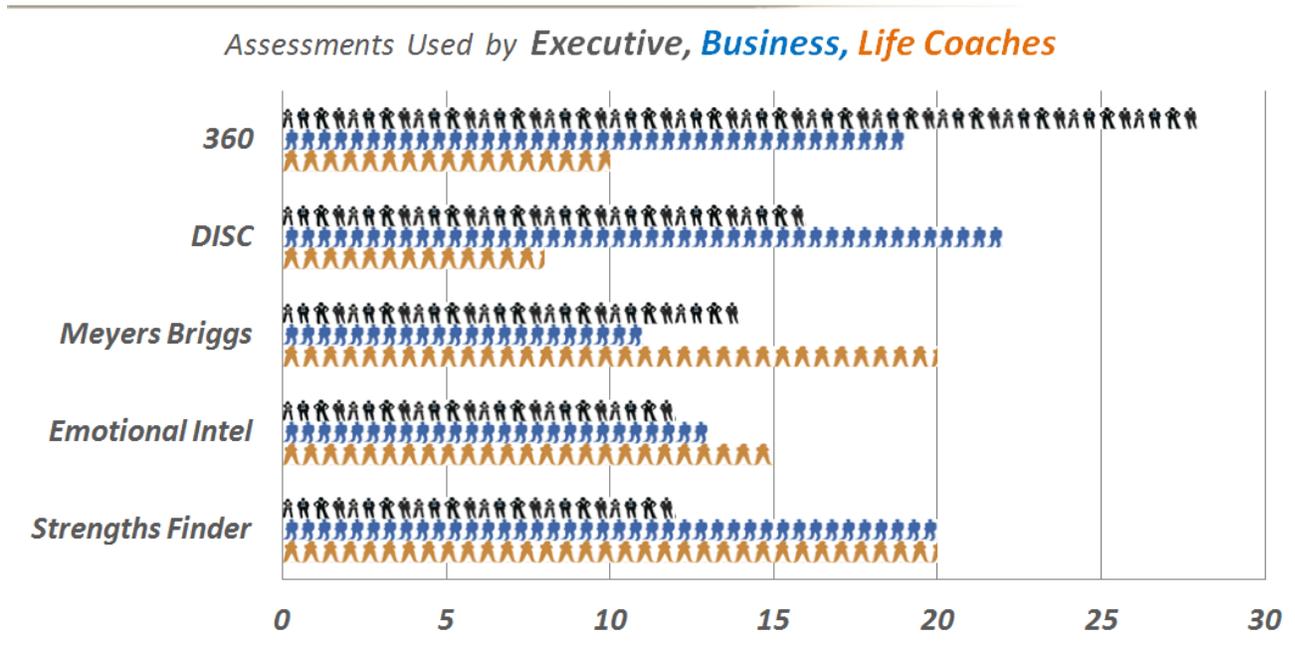
Almost every executive coach gets a running start with their clients by using assessments. These assessments can measure colleagues' opinions, clients' communication styles or leadership strengths and weaknesses.

Based on what a coach wants to measure, there are several basic assessment types. Some are called 'type models', which classify tendencies

and preferences, with no good or bad types, per se. DISC and Meyers Briggs fall in this classification. Other assessments are diagnostic, designed to point out problems and weaknesses. '360' assessments fall under the 'diagnostic' label.

For executive coaches, '360' assessments lead the pack, hovering at a 26% market share. Next in popularity, there's a group of assessments, each with a market share around 15%: DISC, Meyers-Briggs, Emotional Intelligence, and Strengths Finder.

Assessments used: executive coaches in black, business in blue, life coaches in orange.



There's a trend toward the use of assessments among executive coaches. Always a common practice, the use of assessments has become a standard practice. A couple of years back, 8% of coaches did not use an assessment at all. Last year, that number dropped to 4%. This year, almost everyone reported using an assessment.

If every coach has a favorite assessment, you'd expect the most popular tools to remain popular in a saturated market. Leading providers are consolidating and increasing their hold on the market. Each year, fewer participants check the 'other' box and write in a name that's not among our major choices.

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Special case: Of all the assessments we have analyzed, there's one assessment that seems to have a special appeal: the Strengths Finder.

This seems to indicate that working on strengths is becoming common practice for younger coaches and clients, working on weaknesses more common for senior leaders and executives.

It is used far more often by younger coaches with lower billing rates and clients whose rank is less senior.

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% of Coaches Using Strengths Finder, by Earnings Bracket



## Sherpa 7th Annual Executive Coaching Survey With a Little Help from Our Friends

The Sherpa Executive Coaching Survey has acquired global reach over the years. This, our seventh year, represented a breakthrough, with responses from 43 countries, representing 4.4 billion people, almost two thirds of the world's population.

We were encouraged by support worldwide from organizations dedicated to coaching, who shared an invitation with their members and colleagues to participate in this survey. Special thanks to those who agreed to help:

- |  |                              |
|--|------------------------------|
| § Association for Coaching                 | (UK)                         |
| § European Coaching Institute              | (UK)                         |
| § Frank Bresser Consulting                 | (Germany)                    |
| § HR Net                                   | (USA)                        |
| § The International Institute for Coaching | (USA, UK and Portugal)       |
| § The Leading Coaches' Center              | (USA)                        |
| § The Library of Professional Coaching     | (USA)                        |
| § Noble Manhattan                          | (UK, Poland, Romania, Spain) |
| § Peer Resources                           | (Canada)                     |
| § Sociedade Brasileira de Coaching         | (Brazil)                     |



# 2012 Sherpa Coaching Survey Around the World, Around the Clock

*2012 Sherpa Survey: Responses from around the world*



We appreciate support from trade organizations that put their agendas aside and work for the good of coaching and leadership development. Our most dramatic support is from those who take the time to participate, and eagerly await the results each year. Their appreciation is ample reward for our investment in this research.

One person wrote us: “For me, the excellence of this initiative lies in in the analysis and comparisons of surveys taken over the years, which enable an accurate reflection of the changing trends within the coaching industry. Thank you.”

Another said: “Your annual surveys are valuable for the coaching industry. Please keep doing them.”, and

“It is so helpful to see the success of coaching surveyed and tracked. Thank you for this valuable resource.”

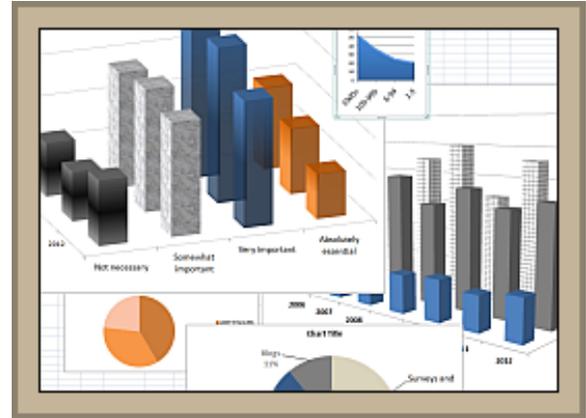
You’re welcome.

# What is the Sherpa Executive Coaching Survey?

The Sherpa Executive Coaching Survey is a research project now in its seventh year. This survey is conducted by Sherpa Coaching, a team of authors and educators headquartered in Cincinnati, Ohio, USA, and co-sponsored by several university executive education departments. Technical support and hosting is provided by IQS Research in Louisville, Kentucky, who validated the collection of data.

As educators in the field of executive coaching, we want to know what business leaders, HR and training professionals think about coaching. We want to know why executive coaches are being hired, and how they go about building an industry. On a broader scale, we want to help build the credibility of executive coaching and ensure the industry's future.

When we started in 2005, no one was doing large-scale research on a regular basis. Small studies with as few as twenty participants were used to draw large conclusions. Some surveys chose their respondent coaches from a personal network, rather than a representative pool of coaches. Even with the right samples, one-time research becomes obsolete pretty quickly.



We have been doing this work for seven years now. There have been other surveys in recent years, but some don't separate life coaching from executive coaching. Some lack a valid sample, due to the size of the study or the way respondents were chosen. Each survey has been a one-time event. In some cases, results have been kept from the general public or offered at a price.

So, we made a commitment back in 2005 to run an annual survey, open to anyone who wishes to participate, and release the results to the public at no charge. That's what we have done every year, and that is what we will continue to do.

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An extended version of this survey, with additional topics and more detailed commentary, is available online at [www.sherpacoaching.com/survey.html](http://www.sherpacoaching.com/survey.html)

# Sherpa Executive Coaching Survey 2012

## Methodology

Each year, we review the way our survey is designed. Over seven years, we have solicited help in survey design from executive education programs at five major universities. In addition, we rely on Shawn Herbig, President of IQS Research in Louisville, Kentucky. Mr. Herbig and his research team offer solid advice any time we consider additions or changes to the survey.

A leading authority on coaching and mentoring, Rey Carr of Peer Resources (Victoria, BC, Canada), has described the Sherpa Executive Coaching Survey as “the most method-sound in the industry.”

We target a broad, representative base when we send out survey invitations. Then, we allow anyone to participate, invited or not. That’s very different from other research we have seen in this field.

The Sherpa Coaching list includes executive coaches, human resource professionals and others interested in the broad field of coaching. This mailing list has been a work in progress since 1999. Email invitations are also sent to lists held by our university sponsors and their alumni.

Participants in earlier surveys are always invited to take part in current research. Anyone who receives an invitation to participate can forward the survey link, allowing for other people to ‘opt in’ to current and future research.

In effect, anyone who knows about the survey can participate, and invite others to do so. This ensures unbiased results, since any latent inequities have been shaken out of the invitation list over the years.

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## Who Responds To The Survey?

So, it’s a survey about executive coaching. You’d expect most of our participants would be coaches themselves.

That proves to be the case once again. Executive coaches made up almost 60% of our respondents. Business coaches came in at 14%. HR and training professionals, coaching clients and purchasers of coaching services provide about 15% of our responses.

Life coaches responded at an 8% rate. Other professionals round out our pool of respondents.

People share our invitations, ensuring a free flow of information and a sample representative of the coaching world. Again this year, most of our respondents were not on our original list of invitees.

1,100 people responded to this survey, providing a margin of error of just 3%. The accuracy of the survey is also confirmed by comparison with responses from previous years, allowing the confirmation of trends over time. Based on an ever-increasing body of knowledge, the 2012 survey accurately identifies changes and trends in industry practices.

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The Sherpa Executive Coaching Survey, 2012:

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# 2012 Sherpa Executive Coaching Survey Sponsors



Sherpa Coaching is based in Cincinnati, Ohio, USA.

For managers and executives, Sherpa offers one-on-one coaching.  
For leaderships groups and teams, Sherpa conducts workshops based on their university texts.  
For coaches, Sherpa offers training and certification on campus at several major universities.

Custom programs are available on site. More information is available at [www.sherpacoaching.com](http://www.sherpacoaching.com)



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*Center for Continuing Education*

The University of Georgia Center for Continuing Education in Athens, Georgia, USA, provides programs and services which connect the University with lifelong learners throughout the world.

The Center designs, develops and delivers a variety of educational programs to meet the learning needs of a diverse population. With a luxury hotel, restaurants, meeting rooms and banquet facilities, The Center offers a dynamic learning environment for classes, conferences or special events. More information at <http://www.georgiacenter.uga.edu/is/coach> .



Miami's Corporate & Community Institute in West Chester, Ohio, USA, provides customized programs taught by a core group of instructors and consultants who are highly skilled educators, researchers and experts in their fields.

They leverage their business expertise and field-based research to expose participants to multiple perspectives and challenge their thinking on many levels. The result provides learners with knowledge, tools and techniques that can be applied back on-the-job to enhance productivity. Visit <http://www.regionals.muohio.edu/cci/sherpa-coaching.htm> for more.



Tandy Center for Executive Leadership at Texas Christian University, Fort Worth, Texas, USA, provides executives with training and development opportunities to help them advance their professional and leadership effectiveness.

The Center provides high-level training customized to client needs; consulting services that produce relevant results, and executive coaching to help achieve tactical goals.

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Headquartered in Louisville, Kentucky, IQS Research delivers research on markets, customers, and employees, with studies designed to identify issues and opportunities, and map a path to success.

IQS Research collects and analyzes data to provide the information needed for reliable, fact-based decisions that lead to profitable outcomes. For customer satisfaction, employee feedback and market studies, visit [iqsresearch.com/services.htm](http://iqsresearch.com/services.htm).

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An extended version of this survey, with additional topics and more detailed commentary, is available online at [www.sherpacoaching.com/survey.html](http://www.sherpacoaching.com/survey.html)