

CoachSource is the world's most experienced leadership coaching company. At CoachSource, executive coaching is our passion. Our worldwide team of coaches develops highly successful leaders, using programs tailored to fit their objectives as well as those of the organizations they manage. It's our job to make hiring and managing coaches easy, while providing all the tools to track results with confidence.

## COACHSOURCE: EXECUTIVE COACHING EXCELLENCE



### LARGEST AND MOST EXPERIENCED NETWORK.

1000 executive coaches in 51 countries around the globe, speaking 55+ languages.



### PROVEN COACHING METHODOLOGY.

Inspired by the work of Marshall Goldsmith, our methodology has been in use for 20+ years.



### COACHSOURCE CLOUD™

Tracks all aspects of your coaching program 24/7, for internal and external assignments – our coaches or yours.



### COACHING MANAGEMENT SERVICES.

Using our coaches or yours, internals or externals, we can manage everything – worldwide.



### MEASURABLE RESULTS.

What gets measured gets done. Unique Mini Surveys measure leader improvement.



### COACHSOURCE CONNECT.

Exclusive invitation-only development community for external and internal coaches.

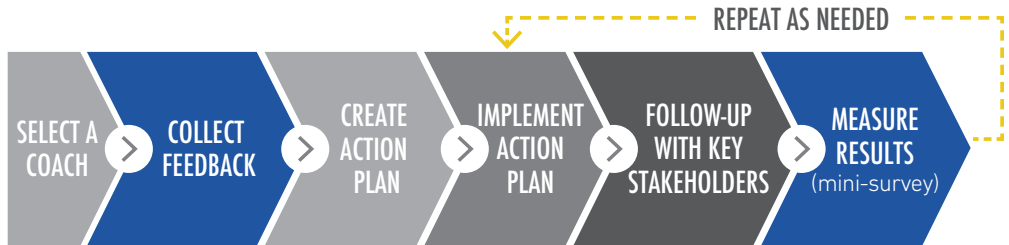
# ABOUT COACHSOURCE

CoachSource is proud to be the world's largest and most experienced leadership coaching firm, with 1000+ handpicked coaches spanning 51 countries.

## PARTIAL CLIENT LIST

AbbVie	CSAA	Microsoft	Takeda
Adobe	Dell	MillerCoors	Target
ADP	Genentech	Pacific Gas & Electric	Toyota
Agilent Technologies	Google	Pfizer	Union Pacific
American Express	Grainger	QVC	Unum
Assicurazioni Generali	HSN	Raytheon	VF Corporation
Bank of America	Humana	Roche	VMware
Brown-Forman	Ingersoll Rand	SanDisk	Westfield Group
CalPERS	Intuitive Surgical	SC Johnson	Whirlpool
Cisco	Juniper Networks	Silicon Valley Bank	Workday
ConocoPhillips	Keysight Technologies	Stryker	Yahoo!

A direct "spin off" of Marshall Goldsmith's last organization and the only firm officially authorized to carry out the Goldsmith Stakeholder Centered Coaching Goldsmith process, our coaching methodology has been in use far beyond our 10+ years of business.



360 and/or interviews;  
assessments; Other inputs.

Select areas for development  
Review actions with key stakeholders (including Manager)



**DR. BRIAN UNDERHILL**

Chief Executive Officer



**DR. KIMCEE MCANALLY**

Chief Coaching Officer



**STEVE SASS**

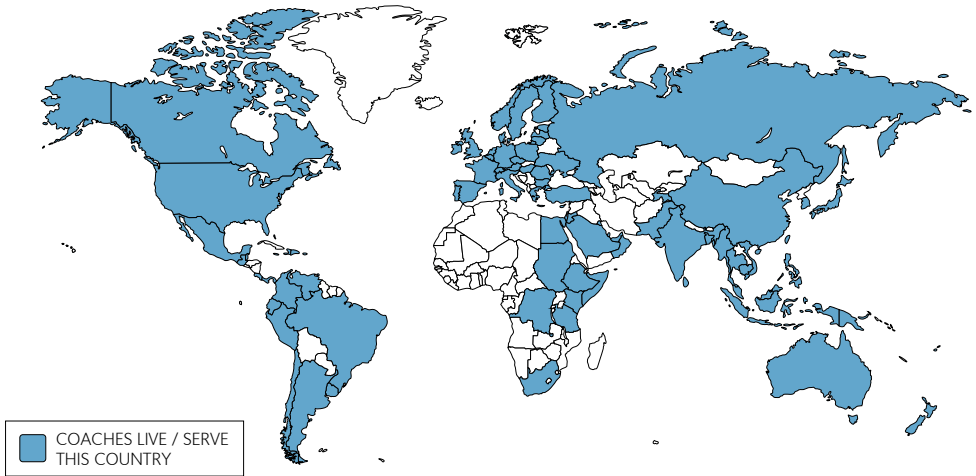
Chief Financial Officer

**ENGAGEMENT MANAGERS : 25+ WORLDWIDE**

**EXECUTIVE COACHES : 1000+ IN 51 COUNTRIES**

# WORLDWIDE COACH NETWORK

CoachSource's network includes 1000 executive coaches spanning 51 countries.



## COACH SCREENING: SEVEN KEY CRITERIA

- 1 **Specialist in leadership effectiveness coaching** - helping leaders achieve positive, long-term change in leadership behavior over time.
- 2 **Extensive experience coaching senior leaders** (C-level, EVP/SVP, VP, Director).
- 3 **Years of experience coaching** – Min 5 years as practitioner, 10+ years preferred, min 2 years independent.
- 4 **Business experience** – formerly possessing senior leadership positions in organizations, line management and Fortune/FTSE 500 preferred.
- 5 **Client list** of Fortune/FTSE 500 organizations of similar size and stature to our clients.
- 6 **Advanced degree:** MBA, MA, MS or Ph.D. in organizational development, organizational psychology, business or related fields.
- 7 **Executive presence** – Demonstrates the overall presence of a seasoned, senior executive coach.

### ALSO INFLUENTIAL:

References from candidate's coaching clients

References from CoachSource clients and/or coaches

Specific coach training and certification

Geographic location

# MEASURED RESULTS

A pioneer in the area of results measurement, CoachSource encourages metrics on every assignment.

## WHAT GETS MEASURED GETS DONE.

**1. Coach Satisfaction Survey (CSAT)** - We conduct a Coach Satisfaction Survey to ensure the coaching relationship is working well from the leader's point of view.

### HOW SATISFIED ARE YOU WITH YOUR COACH IN THE FOLLOWING AREAS:

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Identifies clear priorities for my growth and development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Genuinely listens to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provides specific, actionable suggestions/advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates in a direct and concise manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall satisfaction with your coaching experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**2. Impact Survey (MINI Survey)** - Did the leader improve as a result of coaching? Those around the leader answer just a few questions at the assignment's end.



### OVERALL LEADERSHIP EFFECTIVENESS



We guarantee 100% satisfaction. Always.

Results can be aggregated among all your leaders for an enterprise-wide view on coaching effectiveness

# PROGRAM MANAGEMENT

Your coaches or ours, internals or externals, CoachSource can manage it all – from building an initial pool to the final billing summary.

Leave the work to us. Our experienced Engagement Managers make it all happen seamlessly. Do what you want, we'll take care of the rest.

## MANAGEMENT TASKS



### CONSOLIDATED COACH POOL

Use your current coaches and/or ours. Internals and externals. Worldwide.



### NEW ASSIGNMENT INTAKE

We gather details on each new request, ensure coaching is the right option.



### COACH NOMINATIONS

Customized nominations of 3-4 coaches best suited for each assignment.



### ACTIVITY TRACKING

Tracking of every coaching interaction in your organization.



### MEASURE RESULTS

Coach satisfaction and leader impact. Measured.



### COACH COMMUNITY

Learn from your coach community. Share with your community. Build your community.

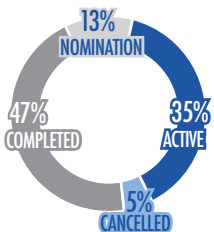


### BILLING & EXPENSE MANAGEMENT

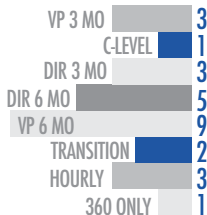
Single billing. Single point of contact. 1 MSA for all your coaching.

## SAMPLE REPORTING

### PARTICIPANT STATUS

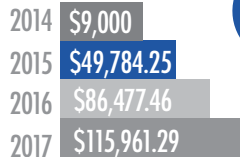


### TYPES OF ENGAGEMENTS



### COACHING SPENDING

#### BY YEAR



### COACHING SATISFACTION



OVERALL SATISFACTION: 100%

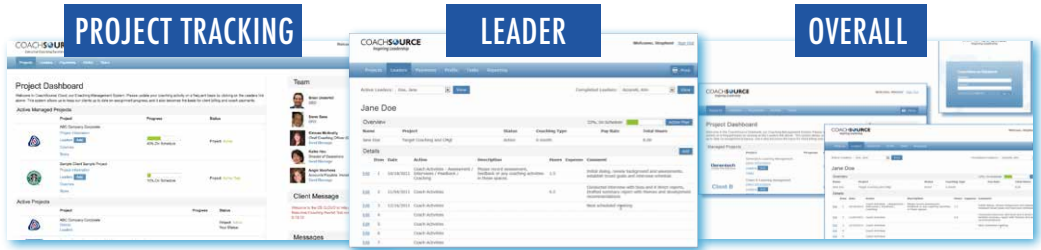
**Reporting** is provided on an agreed-upon basis. We will work with you to identify desired metrics, reports, and timing.



# COACHSOURCE CLOUD™

Ditch the Excel spreadsheets. Turn to the CoachSource Cloud™.

To ensure the highest quality of management, clients are given access to the CoachSource Cloud, our state-of-the-art coach tracking technology to enable convenient, virtual, and 24/7 access to all aspects of the coaching program. This includes billing, payments, activity reporting, and coach bios. Reports can then be tailored to specifically meet the needs of each client.

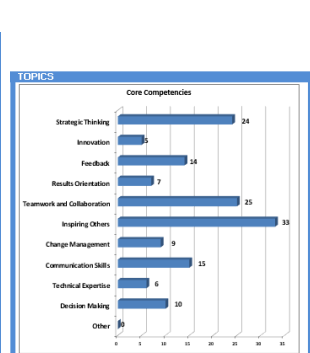
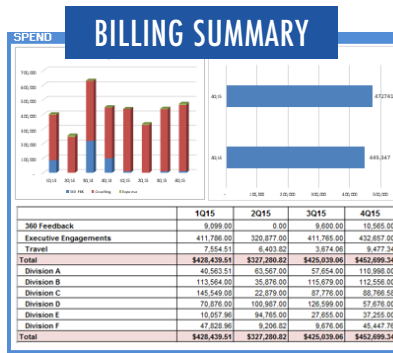
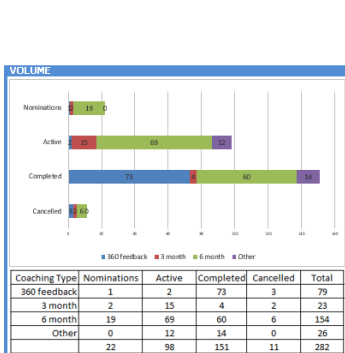


## COACHSOURCE CLOUD SIGN-IN

All coaches and authorized client coaching representatives (e.g., client's HRBP or L&D) would have individual sign-in capabilities for the CoachSource Cloud. Each coach reports and updates activities directly into the Cloud for each assignment — for real-time tracking.

## TRACKING CAPABILITIES

Several standard reports are available based on information in the CoachSource Cloud and we will work with you to identify desired metrics, reports, and timing (e.g. quarterly).



## ENGAGEMENT TYPES

## CORE COMPETENCIES SUMMARY

## YOUR COLLEAGUES. YOUR CONNECTIONS. YOUR COMMUNITY

CoachSource Connect. The world's premier online developmental community solely for senior executive coaches.

Like every business professional, executive coaches need a peer group - a supportive community of fellow travelers who understand the unique challenges confronting the executive coach, and can share the knowledge and experience each has garnered to overcome them. CoachSource CONNECT is the worldwide community of external and internal executive coaches created by CoachSource for coaches to help each other learn, share and connect.

As a CONNECT member, you have access to the following benefits:



Quarterly **keynote webinars** with big-name, industry thought-leaders



Intimate, **monthly 'Conversation Calls'** as a forum for sharing timely coaching best practices, challenges and ideas with fellow members.



ICF Continuing **Education Credits** for selected events



Significant **registration discount** to attend our CoachSource Worldwide Conference, and other coach trainings, as they come along.



A **quarterly newsletter** that will now feature what your fellow connect members are saying about debated industry topics (mini surveys conducted quarterly)! Also including industry news, CONNECT member highlights, CoachSource updates, conference discount information and more!



**Monthly calendar reminders** highlighting upcoming Webinars, Conversations and Events



A **library of previously recorded keynote webinars** hosted by speakers like Marshall Goldsmith, See Luan Foo, Mary Wayne Bush, Andreas Bernhardt, David Peterson, Marcia Reynolds, Kate Ludeman, Eddie Erlandson, and more!



**Access to the private CONNECT LinkedIn Group** to engage with Brian Underhill and your fellow CONNECT members about industry relevant topics and discussions



**Access to a discounted \$100 annual membership (v. \$150) to ICPA**, a professional association committed to bringing the best coaching research and resources to its members.



**Our executive coaching fee study**- based on the latest information provided by you and your executive coaching colleagues



**Reduced \$199 annual membership investment** (down from \$349)



“The coaching world is so diverse that I, and my team of former CEOs who coach and mentor senior leaders, rarely find commonality with other coaching organizations. CoachSource Connect, with its other highend, business-focused coaches, is the only place that I feel 'at home'.”

-Iain Martin, CoachSource coach and CONNECT member

Your CONNECT Leadership Team: Kimcee McAnally, *Chief Coaching Officer*, Brian Underhill, *CEO, CoachSource* & Patty Ainsworth, *Coach Associate*



# CASE STUDIES

Our other clients include some of the world's largest and most recognized organizations.

## MULTINATIONAL BIOTECHNOLOGY COMPANY (\$3B+, 12K+ EMPLOYEES)

CoachSource has been serving this multinational corporation of over 12,000 employees since 2012. This includes providing coaching management services for a pool of Preferred Network coaches (includes initial coach request intake, coach matching, coach communication, CoachSource Cloud tracking, quarterly/annual reporting, invoicing, coach payments); 360 debrief intake, matching and management services for both internal and external coaches; coordinating with their 360 vendor; and supplying CoachSource coaches to supplement firm's existing coaching network.

## MULTINATIONAL TECHNOLOGY COMPANY (\$50B+, 100K+ EMPLOYEES)

A successful case study which demonstrates our ability to meet a large-scale volume of services for one of the world's most recognized technology organizations. CoachSource has provided all the external coaching for this client since 2007 as the exclusive provider of executive coaching services globally. CoachSource provides a variety of executive coaching services of varying lengths and for varying purposes such as transitions, communications skills, on-boarding etc. From the client: "In addition to high quality coaching, they also provide us hands on detailed project management services which includes extensive reporting to enable us to understand the quality and impact of this investment."

## FORTUNE 100 TECHNOLOGY COMPANY (\$90B+, 100K+ EMPLOYEES)

With over 30 separate high-potential programs in operation around the world, this client was seeking a provider to enable them to align their worldwide programs into one. In 2006, CoachSource was selected for the availability and quality of our global coaching pool, use of technology to support the coaching process, and the flexibility required to meet the client's needs. In the first year, approximately 214 of 250 leaders took advantage of the executive coaching program via CoachSource. The program has grown over the years to eventually serve over 700 leaders. There are roughly 50 coaches in organization's coaching pool. In October of 2013, this program for global high-potentials won a local ICF Prism Award, and we were invited to accept the award with them.