



Organization Context and Assessment Plan

Prior to beginning a coaching engagement, coaches should “do their homework” by gathering information that builds their understanding of the organizational environment in which the client works, and establishing an initial plan for using assessment data, if appropriate.

Organizational Context

1. What strategic organizational objectives are most relevant at this time?
2. What current organizational and/or functional department issues are occurring?
3. What political factors are occurring?
4. How are any of these issues negatively impacting the client?
5. What are the opportunities or risks for the client at this time?

Client Readiness

Use the *Coaching Readiness Checklist — Coach's Assessment* tool to evaluate the degree to which the prospective client is ready to fully take advantage of the coaching process.

Issues related to client readiness that may need to be discussed or addressed:

Key Stakeholders

A factor that contributes significantly to coaching effectiveness is the supportive participation of key stakeholders, such as the client's manager or mentor as well as colleagues and employees.

1. Who are the key stakeholders that should be involved in designing the alliance and in the intermittent assessments of the coaching progress?
2. How should key stakeholders be involved in the coaching process?

Assessment Plan

1. What current assessment data exists for this client (360 feedback, employee surveys, performance reviews, etc.)?
2. What additional assessment data would be useful?
3. If yes, is a 360 Interview Feedback Process feasible? Consider the following:
 - A. Are there supportive colleagues available for the 360 interviews? ☐ Yes ☐ No
 - B. If yes, is the client amenable to engaging a 360 interview process? ☐ Yes ☐ No