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# ELEVATING THE VIRTUAL COACHING EXPERIENCE

## for greater impact on leaders and organizations

by Sophia Zhao & Vandana Vishnu

**V**irtual coaching is not new. Even in the pre-covid era, some coaches and their coachees chose to conduct the process virtually. And the pandemic has made virtual coaching shift from “optional” to “default.” For some coaches, virtual coaching may be just more of what they already do; for others, there has been a steep learning curve.

As virtual coaching continues to be the primary choice, it brings both opportunities and challenges. On one hand, since many people are more tech savvy than they used to be, the acceptance level of virtual coaching is much higher. Also, when people are just a mouse click away, we see more cross-time-zone requests, and this means more opportunities for coaches. But on the other hand, we also notice that after almost a year’s work from home, both coaches and coachees have a certain level of fatigue about “just another virtual meeting.”

Like it or not, virtual coaching is here to stay. The question is:

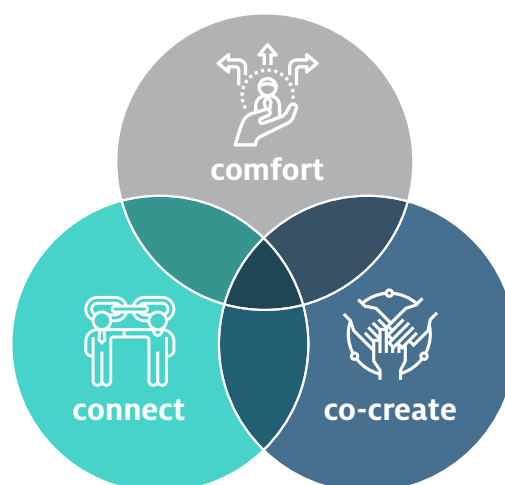
“How do we elevate the virtual coaching experience so that we create greater impact on leaders as well as the organizations?”



## Create impact through virtual presence during coaching

To answer the question, we reached out to our community of coaches, who are dedicated to providing a transformative experience to clients and have gained experience in virtual coaching. Three focus group sessions were held to collect the wisdom from the CCL coach community.

Our learning can be summarized in the framework. While we acknowledge that virtual coaching is challenging, we also realize that the medium has its own benefits. Used smartly, virtual coaching can create even greater impact than face-to-face coaching.



# Comfort

The virtual coaching experience can be very uncomfortable to coachees – imagine that you are going to share your “issues,” emotions, and deep core values with this person, whom you can only see in a two-dimensional screen! Since building initial trust is so important, coaches need to be aware of coachees’ mental barriers and needs.

The first factor is comfort. This is the “hygiene” factor that involves getting the infrastructure right. By creating comfort, coaches start to help coachees feel more confident and open.



## TIPS TO CREATE COMFORT:

### Coziness

- ✓ Make sure that you are alone in a quiet room
- ✓ Remind your coachee to find a quiet space where he/she feels comfortable
- ✓ Make sure both coach and coachee close all other windows in the screen
- ✓ Check if the coachee needs some water or other beverage

### Technology

- ✓ Set up and check the technology (internet connection, meeting platform, audio and video)
- ✓ Watch yourself in the camera: angle, light, position, backdrop etc.
- ✓ Be prepared for alternative virtual platforms

### Logistics

- ✓ Check if the coachee has any meeting immediately before or after the coaching session, and agree on buffer time
- ✓ Set alarms for break(s)
- ✓ Ask coachee for more than one contact / platform as a backup to connection issues

The infrastructure includes all aspects of the technology. To ensure internet connectivity, you need to know that a LAN (Local Area Network) line is more stable than wireless signals. If you encounter an unstable connection, try switching off the camera – the trade-off is that you will lose the visual contact, but we suggest doing so, because according to our experience, excellent audio quality is critical.

Coaches also shared their experience with various devices. For example, one coach shared that the type of

over-ear headsets that cups the ears is best for picking up tones and voice inflexion.

Check your physical space for virtual coaching: do you have good light in the room so that coachees can see your face clearly? Some platforms allow you to use virtual backgrounds that can be distracting, especially when you move. If you don't want coachees to see your messy room, you can also find a backdrop that suits your style and fix it as your virtual coaching corner.

## A coach shared how technology became an enabler in his 1-on-1 feedback coaching sessions:

“ For this coachee from China, we had two feedback coaching sessions. Thanks to technology, we were able to have our sessions even during COVID-19 lockdown. One of the challenges was to debrief an assessment, although he was not so conversant in English, Zoom enabled me to use annotation to go through his assessment report part-by-part, and focus on specific paragraphs at a time. We could progress smoothly and be on the “same page.” He was able to comprehend the report during the first session, and identify goals. During the 2nd session, he was able to account for his developmental efforts.”





# Connection

The connection between coach and coachee is the basis for impactful coaching to occur. Connection is about creating a safe space where coachees can trust the coach and open up to the unfolding of insights and deeper reflections. In a face-to-face scenario, coaches connect with coachees by listening at multiple levels and layers – listening to not only the facts, but also emotions and values, paying attention to not only what coachees say, but also their non-verbal cues. In a virtual setting, the non-verbal cues are suddenly limited to the two-dimensional screen: not seeing the full body, missing visual cues, not knowing what else is going on in coachee's space creates barriers.

Coaches need to make extra effort to build the connection. For example, coaches may need to pause and check more frequently than they would during face-to-face coaching. Since we only have the head and shoulder for body language cues, responses such as nodding, smiling and facial expressions may need to be exaggerated in order to register. Remember, before logging in to the meeting room, look at yourself in the camera one more time: am I looking straight into the camera? How's my energy shown? Smile ☺

## TIPS TO CREATE CONNECTION:

- ✓ Be mindful that most executives are switching abruptly from one meeting to another and swamped with virtual meetings. So, settling in is more important now than ever
- ✓ Start with some warm-up questions
- ✓ Look into the camera to create virtual eye contact – if you have to look aside, tell coachees up-front that you are actually looking at them
- ✓ Ensure that coaching sessions are put on full screen mode for full attention
- ✓ Take note of your own video image, to make sure it's an appropriate proportion to the screen, and vary that to invoke different senses. For example, lean forward and occupy the space to inquire and lean back to show receptivity
- ✓ Be sensitive to the “vibes” and pick up non-verbal language

Most importantly, coaches need to take care of themselves. Coaches' well-being is the basis to bring the best into coaching sessions. So, take care of your physical, emotional, mental and spiritual self. Before any coaching session, take some deep breaths to center yourself.





## A coach shared how he built connection with a coachee who was experiencing transition of both role and country:

“ The coachee was transitioning from one role to another and from one country to another, so, it was for both cross-cultural preparation and leadership coaching. There were no issues on the technology set-up. At first, I had only a little information on the coachee. Considering that he had just moved to a new country by himself and was isolated by COVID, I decided it was more appropriate for him to start talking first, so I could understand what immediate concerns he had. I knew that he had already read up enough about me.”

“ We contracted on the recording issue. Quite close to the beginning, I could see from his demeanor and speech that he was probably the more reflective learning type. Having confirmed the observation, I offered to split the session into two parts, allowing him some time to digest and reflect, and perhaps return with fresh perspectives and queries during the second half.

The approach gained his trust quickly, and he was quite relaxed and open about his concerns.”



# Co-creation

Coaching is a co-creating process. In virtual setting, coaches can - and should - also invite coachees to co-create the space and experience. As a CCL associate coach said: “Options are unlimited... mostly limited by our imagination!”

YOU MAY LOSE SOME FEATURES IN THE VIRTUAL SETTING, BUT YOU CAN ALWAYS ASK:

- ✓ I noticed...is everything alright?
- ✓ What else is going on in your space?
- ✓ What was your body reaction when you said...?

Co-creation is about using the technology smartly. For example, during a feedback coaching session, one coach invited her coachee to open the report simultaneously on a different device and have a “fireside chat” type of coaching.

Co-creation is also about creating a virtual experience together. So, let go of some assumptions that you may have held. For example, you can let go of the assumption that cameras must be on to stay connected. When you sense that your coachee needs a different energy, you can invite him/her to walk around in the space and keep talking to you about what he/she is experiencing. Actually, switching off the camera also allows the co-creation of a common virtual space. When sensing the need, coaches can allow, or even encourage the coachee to switch off the camera, be with him/herself for a moment and get back to the session when ready.







## Coaches shared how they co-create the experience with their coachees:

“ With an executive coachee from public service, I was able to build rapport during the first session through referencing the home environment that he was logging in from during circuit breaker. We were able to find things in common, more quickly than if we were both situated in a meeting room. We were quickly able to talk about where we lived, the books we were reading, mementos, etc. Even though it was virtual, yet it somehow created a warmer space for both of us to begin our journey on.”

“During one session, my coachee went to the workplace and dialed in from there. Due to the safe entry requirement, he was all alone in his office. Spontaneously as we were talking, what I got him to do was to move around the workspace and show me the cubicles/offices of some key stakeholders (boss, direct reports) that we had been discussing about. This helped deepen the discussion and enhanced coachee’s reflection. Somehow it made things more real and conjured up emotions related to the people concerned.”





## Reflect on Your Experience

The challenge of virtual coaching, most of the time, is in our mind. If we can shift the mind-set to view this as an opportunity, we will see a lot of benefits of virtual coaching: for example, you will find your coachees more relaxed in the space that they are familiar with. Virtual coaching also allows you to reach out to more people across geographies, broadening your coaching experience. Also, technology provides more flexibility in terms of when and how we want to communicate with coachees. We hope that with the framework and tips provided in this article, coaches can create more impactful coaching experience and evoke transformation among coachees.



## Case Study

### **Jollibee Foods** CORPORATION

## Building a Coaching Culture

### Context:

*Jollibee Group (JFC) is one of the largest global food companies with 16 brands operating over 5,800 stores in 33 countries.*

JFC and CCL embarked on a multi-year journey to create a One JFC Coaching Culture that would empower employees and teams and reinforce a cohesive organizational culture as they continued to expand internationally. The journey started with the Coaching for Greater Effectiveness program provided to 200 top leaders from 2017-2019. As a next step, the Better Conversation Everyday (BCE) program is being provided to all managers through a train-the-trainer (TTT) model.

The Covid Pandemic created challenges to the transformation journey. To nimbly adapt to the situation, the majority of the BCE rollout in 2020 has been delivered in a Live Online format. The challenges that have come with Covid have also led to an increased “hunger” for approaches and tools that can help the leaders in getting through this uncertain time with more self-awareness and resilience. In addition to the focus of building a coaching culture, the BCE rollout is helping employees communicate and engage others more effectively in a virtual environment and successfully adjust to the Covid challenges and the ‘new normal’.



## Process:

The CCL team worked closely with JFC to **Co-create** the journey and program design, making many adjustments along the way to maximize the impact in both the face to face and the virtual environment. The journey included learning modules, assessment, online digital tools, and post-program pulse checks.

Involvement of JFC leaders throughout the journey was a critical success factor. In addition to participating as sponsors and key stakeholders, a number of JFC leaders were ramped up as virtual breakout room hosts and led the small group discussion. The approach further increased the level of coaching capability within the organization and created **Comfort** as participants were able to speak their local language. Having a good understanding of the organizational context, the trained hosts were able to **Connect** with the leaders and reinforce the coaching culture during the BCE sessions and in the day to day work environment.

Ongoing adjustments to the approach and solution was another key success factor. For example, the initial BCE Live Online programs made evident the importance of breaking the ice and creating a light-hearted environment became even more important in the virtual world to make participants feel **Comfortable**. To address that, a breakout session was added at the very beginning of the program to allow participants and facilitators to build more **Connection**. With accumulated exposure to virtual coaching and training, it became apparent that facilitators and coaches needed to adopt additional tools and techniques to maintain high levels of engagement with participants. More interactive activities, such as polling, annotation, and quizzes were utilized in the program design as a result.

## Impact:

So far, the One JFC Coaching Culture has provided measurable outcomes including significant improvement in managers' ability to have difficult conversations, to provide feedback for development and to support colleagues to be the best version of themselves.

Data from hundreds of leaders within JFC confirms that virtual BCE sessions have been equally impactful compared to face-to-face BCE. The average end-of-program evaluations for both face-to-face and virtual programs have been 4.8 out of 5. A recent pulse check that measures behaviours and outcomes from the perspective of direct reports shows virtual sessions receiving even higher scores on leadership effectiveness compared to face to face.

Overall, employees across store brands find their direct managers challenging and supporting them more effectively to work through the transformation JFC is going through.

Participants have shared many stories and examples of how these new approaches have helped them resolve real operational challenges.

A participant said:

“ *...with the use of BCE technique, we were able pinpoint the exact problem and as a result, of today, our store has “zero” complaint pertaining to delivery.*”



# Organization Cheat Sheet to Elevate Virtual Coaching Experience

## Leader Coaches

- ✓ Set up sessions well in advance and send a reminder one day before
- ✓ Check for technology comfort
- ✓ Secure private space for confidentiality and make sure that headphones are available when needed
- ✓ Use the first few minutes to settle in – be present in the session
- ✓ Check for time boundaries: When does the next meeting start? Is there a mealtime that is right after the session
- ✓ Prepare for the session by exploring the platform: How to share/ cocreate a document? How to create a shared space for jointly noting key insights or actions?
- ✓ Introduce technology-based collaboration in a deliberate manner, and observe the impact on coachee
- ✓ Leverage coachee's current surroundings to help build connection
- ✓ Co-create the space by asking them to bring an object from their surroundings to represent a challenge/ opportunity
- ✓ Articulate your observations of non-verbal behaviour

## HR

- ✓ Encourage people to set up virtual coaching sessions and not to wait for face-to-face meetings to resume
- ✓ Establish a standard technology platform for coaching
- ✓ Talk to coaches as well as coachees about the importance of private space in a coaching session
- ✓ Get leader coaches together to share their experiences in coaching virtually
- ✓ Involve senior leaders to share organizational expectations and context

## Coachees

- ✓ Allow yourself a transition time as you step into a coaching session – 10 min to review the goals and actions that you have taken
- ✓ Plan for a 15-30 min quiet reflective time one day before the coaching session
- ✓ Be intentional about what you would like to get out of the coaching session
- ✓ Organize a private space for your coaching conversation
- ✓ Share any discomfort about technology or other topics with your coach immediately
- ✓ Notice, and share with your coach, how you are experiencing connection

## READY TO TAKE THE NEXT STEP?

Leadership coaching is one of the most effective tools available to take leadership development to a deeper and more sustainable level — whether focused on the individual or on your entire organization. Coaches expand perspective, inspire, and provide challenge and support like no one else.

Both leadership coaching and building coaching skills can have a lasting impact on an organization's ecosystem of leadership.

Learn more at: [ccl.org/virtualcoaching](https://ccl.org/virtualcoaching)

## About the Authors



**Vandana Vishnu** leads the Asia Pacific Coaching Talent for CCL.

As part of her role she maintains quality of coaching engagements for all CCL clients and works closely with 120 plus coaches in the APAC region. She is a leadership facilitator and coach with 22 years of experience. She is deeply committed to develop inclusive leadership processes in organizations to positively influence the business outcomes and development of human potential at workplace. The strength of her work with client organizations lies in following a partnership approach that leads to deep and longitudinal engagements with clients.



**Sophia Zhao Ph.D.** is a Leadership Solution Facilitator at the Center for Creative Leadership. Based in CCL's APAC office in Singapore, she serves as a facilitator, coach, and researcher, with a focus on the design and delivery of leadership solutions. Through her work, Sophia has supported the growth of leaders from both public and private sectors, representing diverse industries and multiple levels. Sophia has more than fifteen years' experience in researching organizational behavior, human resource, and leadership. She has published more than 20 academic journal papers, research reports, white papers and media articles. Sophia holds a Ph.D. degree from National University of Singapore, with full academic scholarship. She also obtained her B.A. degree in economics from Fudan University, where she received the People's Scholarship every year.

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