

ICF Coaching Platform Standards: Sponsoring Organizations

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Coaching Platform: A Coaching Platform uses digital technology to enable an integrated and seamless coaching journey between Coaches and Clients at a large scale.

Introduction

Online Coaching Platforms provide many functions that integrate and enhance the coaching experience for coaching Clients, Coaches, and organizations which purchase those services. Platform services are usually accessed through a web browser or smart phone interface and provide functions such as Coach-Client matching, scheduling, coaching notes, Client resources and journaling, chatbots (with or without Artificial Intelligence, or AI coaching), and access to psychometric assessments.

Coaching Platforms tend to fall into one of two categories:

- A platform which provides specific services that coaches or organizations usually pay for on a subscription basis
- A platform which offers coaches the opportunity to be connected with Clients, or organizations to connect Coaches with Clients and the Coaches are subsequently paid per coaching session or engagement.

Ultimately, online Coaching Platforms will offer a plethora of coaching tools, access to a curated cadre of coaches, and uninterrupted access to an AI Coaching Platform. This will provide "one-stop shopping" for organizations and reduce their administrative workload, while at the same time, provide high-quality coaching for their employees. ICF is working concurrently on an AI Coaching Framework and Standard in order to assist AI coaching developers and purchasers to understand important elements of that capability.

This standard applies to both Platform Developers and Coaching Platform Providers.

Purpose

This document is intended to serve as a guideline for organizations intending to purchase Coaching Platform services (Sponsoring Organizations), to provide standards that can be used to assist in evaluation of capability, safety, and other elements. Similar standards will be developed for other audiences, as described below.

Audiences

Client (Coachee): A Client is an individual working with a coach toward specific goals. The Client may contract to work with one or more coaches through an online Coaching Platform organization or the Client's employer may contract for services with the online Coaching Platform organization.

Coach: A coach is an individual providing coaching services in conjunction with one or more Coaching Platforms. The Coach may pay for use of the platform, may be an employee of the platform organization, or may be a contractor for the platform organization.

Executive: An executive is an individual in a top-level leadership role in an organization. An executive will be making strategic and tactical decisions, and will be responsible for budgets as well as profit and loss for their part of the organization.

Human Resources (HR) Professional: In general, a human resource professional is responsible for managing functions related to the recruitment, development, and welfare of the employees within an organization. When engaging with an online Coaching Platform, HR professionals will connect Clients with the Coaching Platform services and program administrator.

Platform Developer: A platform developer is an organization developing an online Coaching Platform.

Procurement: A procurement specialist or department will have experience negotiating contracts or agreements with suppliers of goods or services. Procurement will have an understanding of legal, regulatory compliance, and information technology (IT) issues.

Program Administrator: A Program Administrator is responsible for the overall function of a coaching program within an organization. The program administrator is generally responsible for the strategic direction of the coaching program, day-to-day operations, and assessment of the program. The program administrator will have good working knowledge of the online Coaching Platform and provide information and feedback to all stakeholders.

Sponsoring Organization: A Sponsoring Organization is one who contracts for the use of an online Coaching Platform. The Sponsoring Organization will employ Clients who use the services of the platform and will likely have individuals who serve as a program administrator, a procurement specialist, and an HR professional.

Definitions

Personal Data: Any information relating to an identified or identifiable natural person.

Service Level Agreement (SLA): Any agreement between a Coaching Platform Provider and User and Sponsoring Organization that outlines the contractual obligations and commitments of the Coaching Platform Provider's service. It may include processing times, up-time commitments, issue resolution time, and customer service response times.

Coaching Platform Provider: An organization utilizing a Coaching Platform developed on their own or by a Platform Developer and branded as their own coaching technology platform.

User: Any individual or organization who acquires or accesses the Coaching Platform. The User may be a Client, Coach, or Sponsoring Organization.

Workgroup Participants

This standard was developed with input from the following individuals:

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Feedback

We welcome feedback on this document and would appreciate you providing your comments [here](#).

Standards

This standard is written with each element in one of the following forms:

- **Shall:** indicating that the platform must comply with the provided statement. Alternatively, “shall not” statements indicate something the platform must not do.
- **Should:** indicating that it is recommended that the platform comply with the statement. Platform Developers and Coaching Platform Providers should be aware that future versions or additional versions of the standard may move “should” statements to “shall” statements.
- **May:** indicating that the platform may or could meet the capability provided in the statement.

Transparency of Business Practices

Definition: Having information related to business practices easily accessible and able to be easily perceived by all relevant parties.

The Coaching Platform Provider:

Elements

- Shall share the transparency of fees and invoicing to the Sponsoring Organization
- Shall share the transparency of what is and is not in contracts
- Shall share the transparency of who is responsible for what within the contracts
- Shall use intuitive language for ease of understanding
- Shall be transparent about any third-party sub-contracts, reseller arrangements, or other third-party agreements
- Shall be transparent about business relationships with supplied coaches and technology providers
- Should disclose all relevant information
- Should state who the investors and stakeholders are
- Should be transparent about possible conflicts of interest
- Should be transparent about how coaches are vetted and hired

Data Privacy and Security

Definition: The focus on issues related to collecting, storing, retaining, and transferring data within applicable regulations and laws. The protection of data against unauthorized access, loss or corruption throughout the data lifecycle.

The Platform Developer and Coaching Platform Provider:

Elements

- Shall respect users' data privacy and security
- Shall be transparent about which security and privacy frameworks and protocols are followed (e.g. GDPR, SOC2, etc.)
- Shall have a public site describing security and privacy protocols
- Shall respond completely and accurately to any requests for security and privacy information in contracting
- Shall make available any security and privacy audit reports upon request
- Shall abide by the minimum standards in laws and regulations, such as:
 - ISO/IEC 27001:2013 (Information Security Management Systems - Requirements)
 - NIST Cybersecurity Framework (NIST CSF)
 - ISO/IEC 27002:2013 (Code of practice for information security controls)
 - COBIT 2019 (Control Objectives for Information and Related Technologies)
 - CIS Controls (Center for Internet Security Controls)
 - GDPR (General Data Protection Regulation)
 - PCI DSS (Payment Card Industry Data Security Standard)
 - ITIL (Information Technology Infrastructure Library)
- Shall include a data processing agreement in all contracts that provides transparency regarding:
 - Personal data
 - What data is collected
 - Where data is stored
 - How personal data is used by the vendor
 - When the data is deleted automatically
 - Who to contact if they have any questions or concerns

- Their right to delete all personal data stored at any time
- How to delete data
- The ownership of their data
- Shall be transparent about who (the Coach, the Client, representatives of the sponsoring organization and the Provider) sees what coaching data, including:
 - Client coaching goals
 - Meeting days and times
 - Session notes
 - Survey and assessment results
 - Client feedback
- Should have a documented process to monitor and prepare for possible changes in laws, regulations, and best practices
- Should be proactive and slightly ahead of the curve on possible changes with laws, regulations, and best practices

Coaching Effectiveness

Definition: A measure of the performance outcomes, related to the determined coaching outcome, or positive psychological responses due to the coaching received.

The Coach, Platform Developer and Coaching Platform Provider:

Elements

- Shall seek to have positive psychological responses as a result of the coaching
- Should provide a way to measure and track coaching effectiveness
- Should be aware of the research behind measuring coaching effectiveness
- Should work towards continuous improvements in performance outcomes
- Should be transparent around what is measured for the performance outcomes
- Should measure coaching effectiveness and be transparent about the measurement system that is used
- May address any negative psychological responses as a result of the coaching

Coach Quality

Definition: Encompasses the level of effectiveness, competence, and ethical standards upheld by a Coach. Quality Coaches support their Clients to achieve desired goals and outcomes while adhering to ethical principles.

For Coaching Platform Providers who provide coaching services, they:

Elements

- Shall be transparent about the knowledge and expertise required for coaches to coach on their platform, such as ICF or other coaching certification levels. May include understanding of different coaching approaches, techniques, best practices, or subject matter expertise
- Shall be transparent around how other indicators of coach quality are assessed or monitored, such as communication skills, emotional intelligence, ethical standards, results, and impact
- May provide information on how they monitor, develop, and reinforce high quality coaching

Trust & Safety

Definition: The standards and processes designed to reduce risk or harm and instill confidence in the efficacy and effectiveness of the Coaching Platform.

The Platform Developer and Coaching Platform Provider:

Elements

- Shall be transparent in the scope and limitations of the services they provide
- Shall have measures and practices to mitigate or eliminate potential risk
- Shall ensure safety measures create a secure and thriving environment
- Should have a process for connecting Clients to referral services outside of coaching (e.g., referring to a therapist)
- Should have a means for monitoring and addressing unethical behavior
- Should have processes and systems that are repeatable and provide a consistent experience for all users
- May seek to employ those individuals who have a scope that is different from coaching (e.g., licensed therapist)

For Coaching Platform Providers who provide coaching services, they:

Elements

- Shall have contingencies in place for various situations, such as mental health crisis or threats of violence
- Shall have the capability to evaluate coaching related safety concerns, where concerns can entail self-harm, harm to others, or imminent risk such as:
 - Physical safety
 - Emotional well-being
 - Protection from various forms of harm (e.g., accidents, discrimination, etc.)
- Shall ensure others and themselves act in a responsible and ethical manner

Platform Flexibility and Customization

Definition: The capability of the Coaching Platforms to be personalized and altered based on the customer's preferences within the bounds of the Coaching Platform's core vision and approach.

The Platform Developer and Coaching Platform Provider:

Elements

- Shall be open and transparent about what can be personalized and customized
- Should offer personalization and customization on as many parts of the platform as possible
- Should take into account the user's feedback and experience with the platform to enhance its flexibility of use
- May integrate with additional systems, such as Human Resource Information Systems (HRIS) and Enterprise Resource Planning (ERP) systems for additional function and customization

Customer Support and Services

Definition: The assistance and advice provided by the Coaching Platform Provider to Sponsoring Organizations.

The Coaching Platform:

Elements

- Shall be intuitive and easy-to-use
- Shall focus on helping the stakeholder diagnose issues, answer questions, improve user experience, etc.
- Shall be focused on the long-term relationship and short-term technical issues
- Should have a specified representative from the Platform Provider who Users can contact for support and service issues
- Should make clear to the Coach and Client who to contact for questions and support, whether it be the Platform Provider, Sponsoring Organization, Client, or Coach
- Should have a defined Service Level Agreement for the Sponsoring Organization

- Should have policies and processes to resolve all issues
- Should be easy to contact support with minimum inconvenience
- Should have resources available to assist the Sponsoring Organizations with support and Client resources
- Should accommodate human accessibility, with or without a disability
- Should be able to know the difference between helping the Client and the Sponsoring Organization
- Should notify Users when updates are made that provide new features
- May provide multiple languages

User Experience and Satisfaction

Definition: The overall experience of a User with the Platform.

The Coaching Platform:

Elements

- Shall be easy for users to access and navigate
- Shall be reliable and stable
- Should have an easy-to-use user interface
- Should have good tutorials, etc.
- Should have capability to allow for User feedback
- Should define who is using the platform (could be Coach, Client, administrator, etc.)
- Should take into consideration the experience of all users:
 - When designing new areas
 - When making changes
- May provide third-party tools within the platform

Use and Benefit of Technology

Definition: Technology can make work easier, faster, and more productive, and in general improve the quality of life.

The Coaching Platform Provider:

Elements

- Should describe the benefits and risks of technology
 - Should enhance coaching with low-complexity interactions
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Procurement

Definition: The process of sourcing coaching activities, investment negotiation, and the ordering of goods and services important to a Sponsoring Organization.

The Coaching Platform Provider:

Elements

- Shall provide information regarding Platform limitations and capability, such as infrastructure for coaching engagements, access to coaches, tracking and reporting coaching progress and engagements, and Client resources
- Shall be transparent and clear regarding pricing, invoicing, payment, and other contract terms
- Shall set expectations on who is responsible for what
- Should offer a preview of the services prior to purchasing
- Should ensure all customers have a representative to contact if they have issues
- May provide integration between the Platform and the Sponsoring Organization systems or data

Coach Matching

Definition: Coach matching is the process that allows Clients and coaches to be paired to work together.

The following section applies when the Platform Developer or Coaching Platform Provider claims to offer the capability for Coach and Client matching.

The Platform Developer or Coaching Platform Provider:

Elements

- Shall provide to all interested parties the coach matching and agreement process coaches and Clients will experience within the Coaching Platform
- Shall provide to all interested parties what specific coach and Client personal data is collected and stored within the Coaching Platform and presented to Users of the Coaching Platform

- Shall meet all applicable data confidentiality and privacy regulations in the locale in which the Coaching Platform is deployed, such as the European Union General Data Protection Regulation (GDPR) or the United States state of California
- Should provide a means for coaches and Clients to terminate an engagement and select a new Coach or Client
- May provide to all interested parties the criteria which can be used for coach matching, such as credential level and industry expertise

Measurement, Evaluation, Impact, and Return on Investment (ROI)

Definition: Measurement, Evaluation, Impact, and Return on Investment (ROI) collectively refers to the means and methods used to indicate growth, development or behavior change as an output of coaching. These methods can be quantitative or qualitative, individual or aggregate, or tied to external performance metrics as an indicator of how well an investment in coaching has performed.

If the Platform Developer or Coaching Platform Provider includes a means of assessing impact or ROI, they:

Elements

- Shall provide documentation demonstrating the validity of their evaluation or ROI assessment methodology
- Shall maintain confidentiality of all personal data
- Should have an expectation of a positive return on the investment of time, effort, and money for all parties
- Should articulate the minimum sample size needed for personal data to be shared in order to maintain anonymity
- Should be evaluated in various ways, such as:
 - Platform availability, i.e. uptime, scheduled maintenance
 - Platform usage by Clients, Coaches, and the Sponsoring Organization
- May share data in aggregate form
- May provide external benchmarks
- May provide developmental feedback from Clients to coaches

Client Identification

Definition: The action or process of identifying Clients or being identified as a Client.

The Coaching Platform:

Elements

- Shall ensure clarification on the identification process
- Shall ensure clarification on the matching process (if applicable)
- Should ensure clarity on who determines the Client(s)
 - The employees of an employer or designees of an organization (i.e., volunteers in a non-profit organization)
- Should have resources or tools provided by the platform to assist the Sponsoring Organization to identify or prioritize Clients (i.e., assessments, guides, checklists)

Ethics

Definition: Morals, values, beliefs, and principles that govern a behavior or the conducting of an activity.

Coaching Platforms:

Elements

- Shall comply with the principles of the ICF Code of Ethics

Product Innovation

Definition: The process of creating and introducing new products or improving existing ones to meet the evolving needs and preferences of customers.

The Platform Developer or Coaching Platform Provider:

Elements

- Shall ensure all products meet ethical standards and guidelines (e.g. legal and privacy)
- Should share the research and methods that inform their product direction

- Should conduct market research to determine the needs, wants, and desires of their customers
- Should consistently be generating ideas for new features or improvements on existing features
- Should be conducting academic research and/or staying up to date with current academic research
- Should disclose where a product is in the software development life cycle (e.g., Alpha, Beta, Generally Available)
- Should explore new features for better functionalities, design, or improved quality
- May share their contributions to the behavioral sciences field to provide the most effective development
- May share a product roadmap

Information about the Coaching Platform Category

Definition: See Coaching Platform definition above.

Features of a Coaching Platform:

Elements

- May include tools for scheduling coaching sessions and facilitating communication between Coach and Client (scheduling)
- May include the ability to set goals and track progress against them (goal-setting and progress-tracking)
- May have access to content and tools that support the coaching process (content and resources)
- May have mechanisms for Clients to provide feedback on the coaching process
- May include the ability to track coaching impact (feedback and evaluation)
- May include tools to collect and analyze data related to coaching themes and goals (data and analytics)

Ecosystem

Definition: A business ecosystem is a network of organizations, individuals, and other entities that interact and collaborate within the specific industry or market. Coaching Platforms will interact with their Sponsor Organizations, Clients, and Program Administrators within those organizations, with individual Coaches providing services within the platform, with other entities providing resources such as assessments, reports, and professional development materials, and employees of the Coaching Platform Provider. The Platform Developer or Coaching Platform Provider may have interdependent relationships, including stakeholders, suppliers, customers, competitors, partners, and regulators.

The Platform Developer or Coaching Platform Provider:

Elements

- Shall inform all interconnected parties the nature of their connection and what information is shared between the systems
- Should ensure the platform meets the Sponsoring Organization's needs
- Should design the platform so that it is dynamic and evolves over time in response to changes in technology, market conditions, regulations, and customer demands

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