

# ICF Coaching Platform Standards



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## Definition

**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 all audiences (see below), to provide standards that can be used to assist in evaluation of capability, safety, and other elements.

## 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:

- Gage Ammons (International Coaching Federation, ICF)
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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.

## Ethics

- Shall use intuitive language for ease of understanding
- Shall require stakeholders to abide by all ethical standards required by the coaching platform, coaching organizations, and applicable laws.
- Shall abide by the ICF Code of Ethics
- Shall ensure all products and services meet applicable ethical standards and guidelines
- Should disclose all relevant information to applicable stakeholders

## Trust & Safety

- Shall require stakeholders to be respectful and ethical
- Shall have measures, practices, and processes to mitigate or eliminate potential risk to all stakeholders and to create a secure and thriving environment
- Shall share the resources offered to support stakeholders
- Should have processes for connecting Clients to referral services (e.g., referring to therapy), which may include training stakeholders and employing professionals from these modalities.
- Should have a means of monitoring and addressing unethical behavior
- Should define how stakeholders are protected
- Should define how each stakeholder is responsible for ensuring Client trust and safety

## Transparency of Business Practices

- Shall share the transparency of fees applicable to relevant stakeholders
- Shall share the transparency of what is and is not included within the contracts applicable to relevant stakeholders

- Shall share the transparency of who is responsible for what aspects within the contracts applicable to relevant stakeholders
- Shall be transparent about any third-party sub-contracts, reseller arrangements, or other third-party agreements applicable to relevant stakeholders
- Shall be transparent about business relationships and technology providers
- Shall be transparent with the scope and limitation of provided services
- Shall be transparency about User background and experience to relevant stakeholders
- Shall set expectations on who is responsible for what
- Should share information about investors and stakeholders
- Should be transparent about potential conflicts of interest with relevant stakeholders
- Should be transparent about how coaches are vetted and hired
- Should offer a demonstration of provided services
- Should disclose platform feature status if it is not fully completed (e.g., alpha, beta.
- Should be transparent about platform availability (e.g., uptime), scheduled maintenance, platform usage by other stakeholders
- May offer integration with systems (e.g., HRIS systems or ERP systems)

### Data Privacy and Security

- Shall respect all users' data privacy and security
- Shall have a public website describing security and privacy protocols and be transparent about which security and privacy frameworks and protocols are followed (e.g., GDPR, SOC2, etc.)
- Shall abide by the minimum standard of laws and regulations (Appendix A)
- Shall respond completely and accurately to any requests for security and privacy information
- Shall make available security and privacy audit reports upon request
- Shall include a data processing agreement in all contracts which provides transparency regarding user information access (Appendix B)
- Shall be transparent about what coaching data is shared, who said data is shared with, and why that data is shared (Appendix C)
- Should have a documented process to monitor and prepare for potential changes in laws, regulations, and best practices
- Should be considerate of other data privacy and security elements requested or followed by stakeholders

### Platform Mechanisms

- Shall be easy for users to access and navigate
- Shall be reliable and stable

- Should have an easy-to-use and intuitive interface
- Should make relevant stakeholders aware of major changes to the coaching platform
- Should solicit relevant stakeholders for their thoughts and feedback when designing new areas or when making changes

### Platform Features, Flexibility, and Customization

- Should have comprehensive and good tutorials
- Should define the stakeholder using the platform (e.g., Coach view, Administrator view).
- Should be open and transparent about what can be customized on the platform
- May include tools for scheduling sessions
- May include tools for facilitating communication between the Coach and Client
- May include the ability to set coaching goals and track progress
- May include data and analytic tools to collect and evaluate coaching theme data
- May provide access to third-party tools within the platform

### Assessment and Measurement

- Shall provide documentation demonstrating the validity of their evaluation or ROI assessment methodology
- Should be transparent around what is measured, how things are measured, and the importance of measuring constructs
- Should explain how the Coaches are evaluated, measured, and who sees this information

### Coaching Effectiveness & Quality

- Shall be transparent about the knowledge, expertise, and requirements that are required for coaches to coach on their platform (e.g., certifications).
- Shall be transparent about the indicators of coach quality that are assessed and monitored.
- Should provide information on coach effectiveness and quality
- Shall seek to have a beneficial outcome for the Client as a result of the coaching
- Shall ensure high quality coaching is present for the Client
- Should address any negative psychological responses as a result of the coaching
- Should provide a way to measure and track coaching effectiveness
- Should understand and apply the research behind measuring coaching effectiveness
- Should continuously evaluate changes to make improvements in coaching outcomes
- Should understand past and present coaching academic research trends
- May help the coach undertake coaching supervision, continuous improvement, and professional development

### Client and Coach Identification & Matching

- Shall explain how coaches are matched with Sponsoring Organizations and Clients
- Shall ensure relevant Client, Sponsoring Organization, and Coaching Provider stakeholders are clear on their role(s) and accountabilities
- Should provide clarity around how Client(s) are identified and prioritized
- Should provide a means for Coaches and Clients to terminate an engagement

### Customer Support, Services, & Information

- Shall ensure the stakeholder has help with diagnosing issues and answering questions.
- Should have the capability to receive User feedback
- Should provide the extent that tech support is available to stakeholders
- Should have a specified means to contact support for service issues
- Should have policies and processes on resolving issues
- Should have stakeholder-specific resources available

### User Benefits, Experience, and Satisfaction

- Should take into consideration the feedback and experience of all Users
- Shall explain the applicable benefits of using the platform for stakeholders
- Should accommodate enhanced human accessibility

## Appendices

### **Appendix A: 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)
- EU AI Act (European Parliament)

### **Appendix B: Shall include a data processing agreement in all contracts which provides transparency regarding user information access:**

- 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

### **Appendix C: 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



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