5th Coaching Survey

An Asia Coaching Benchmark 2019

Geography Report - Indonesia

Participating Markets:
Hong Kong, India, Indonesia, Mainland China, Philippines, Singapore

Edition 1.1 April 2020 release

Acknowledgment of Survey participants, Sponsors, Partner and the Team

We want to **thank all the Participants** who responded to the survey.

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This Integrated Report is a result of several hundred hours of individual and collective effort writing, reviewing and editing by team members who analysed the data and wrote the reports.

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1. Introduction, Methodology and Purpose

1.1 Purpose and Approach

- The purpose of this 5th coaching survey is to establish baseline of the coaching industry in Asian markets and track its development over time to identify trends and new insights to support the advancement of this relatively new profession.
- This survey collects information on coaching practice, process, outcome and demographics from both buyers (primarily companies) and providers (external/internal coaches) of coaching services with the aim of getting the full story from both sides. The approach blends both qualitative and quantitative methods to reach a comprehensive and diverse pool of stakeholders.
- The coaching survey was conducted in English, Chinese, & Bahasa Indonesia languages.
- Previous four coaching studies have been completed in 2010, 2012, 2014, and 2017 respectively. First three studies were done in Mainland China. The fouth one covered Mainland China, Hong Kong and India. Indonesia, Philippines and Singapore were added in the fifth benchmark study completed in 2019

- The 5th Coaching Survey was conducted from January to December 2019. The highlights of the survey findings were presented at the APAC Coaching Conference in Mumbai, India, in August 2019
- The aim is to include other Asia Pacific markets in future studies.

1.2 Methodology

- **Medium:** Online Questionnaire (143 questions)
- **Distribution channels:** Sponsors, Networks, & Social media
- **Time Frame:** Feb 2019 to April 2019
- **Survey Participating groups:** Organizations | External Coaches | Internal Coaches
- **Markets:** Hong Kong, India, Indonesia, Mainland China, Philippines, Singapore
- **Languages:** English, Mandarin, and Bahasa Indonesia
- **Analysis:** Comprehensive and by markets

1.3 The Participants

CR Company/ Organization Representative	A company/organization representative ideally works in the field of HRM/HRD or is a senior member of the leadership team who is privy to the coaching interventions in the company/organization.
EC External Coach	An external coach offers coaching services to companies and/or individuals. He/She is either self-employed or works as a contract worker for coaching providers.
IC Internal Coach	An internal coach is an employee who has the job task to coach fellow employees (making up at least 20% of the job). Coaching of employees for whom the coach is an immediate supervisor does not count.

1.4 Survey Progress

More than 100% growth in participation in 2019 over 2017

Languages	1	1	1	1	3
Total Participants	81	146	369	554	1,286
Companies	43	55	71	168	427
External Coaches	38	68	113	321	703
Internal Coaches	NA	23	35	65	156

1.5 Indonesia Survey

INDONESIA SURVEY 2019					
	2010	2012	2014	2017	2019
Total Participants	NA	NA	NA	NA	307
Organizations	NA	NA	NA	NA	112
External Coaches	NA	NA	NA	NA	143
Internal Coaches	NA	NA	NA	NA	52

1.6 Thank You Sponsors

We would like to thank our esteemed sponsors without whose help and support this survey would not have been possible. We look forward to your continued support in the upcoming research projects.

Together we are the coaching voice of Asia Pacific

Platinum Sponsors

Gold Sponsors

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Bronze Sponsors

1.7 Top 8 Insights

1. **Growth in Coaching services - deeper penetration in markets**
    - Coaching services are being widely adopted in all markets and companies are increasingly becoming more open to introducing coaching services. Our survey revealed that only 2% of the companies are UNLIKELY to introduce coaching as compared to 13% of the companies in the 2017 survey

For Indonesia:

- 85% of the companies are using coaching in Indonesia compared to overall 74%
- Only 1 % Unlikely to introduce coaching service and 13 % still don't know yet.
- Top reason for Indonesia companies unlikely to introduce coaching is The coaching concept is not well known in the company.

How coaches can expand the opportunity by introducing coaching concept in organization?

2. **External Coaching or Internal – Majority of Companies are using a combination of ECs and ICs**

While Companies are increasingly using a combination of ECs and ICs, there is a variance in the perception of the role and efficacy of internal coaches.

For Indonesia:

- Most companies work with a combination of ECs and ICs. 17% engage only ECs
- Organizations engage with internal coaches because : ICs are more cost effective, ICs are more suitable for leadership and high potential programs, and internal coaches provide a better return on

investment compared to external coaches. However, there are issues with confidentiality, neutrality and trust attached to ICs.

How external coaches can provide a better return on investment?

How internal coaches manage their neutrality?

3. **General concern about IC's role not being very well defined**
    - Survey points out that while companies want to create internal capability for coaching, almost half of them say that IC's coaching role is less than 25% of their overall job responsibility. There is an opportunity for IC's role to evolve and become more specialized.

For Indonesia:

- For 71% of organizations, coaching is less than 51% of the IC's job responsibilities
- While 88% ICs agree that coaching is part of their annual goal setting, 88% for career development plan and 88% for performance review.
- ICs spent 65 % of the time in performance coaching, 56% in leadership and career/transition coaching

4. **ECs are investing more in professional development with coaching supervision getting more attention**
    - Formal coaching supervision, although a very new field, is being used by coaches (32% ECs and 26% ICs).
    - Coaches are also using other forms of reflective practices like mentor coaching, peer network learning etc. to enhance their quality of coaching.
    - While all coaches are leveraging multiple forms of professional development, ECs are more invested in professional development. Nearly double the number of ECs (41%) than ICs (23%) spend 60 hours per annum or more on continuous professional development.

For Indonesia:

- Coaching supervision, although a new area, 32% ECs and 32% ICs say they engage in it. While most Coaches (43% ECs and 55% ICs) say they get supervision pro-bono, 38 % EC and 42% IC say they pay up to USD 200/ hour.
- ECs are more invested in professional development. 23 % EC spend 60 hours or more on continuous professional development while IC only 8%.
- Majority of EC (60%) and IC (54%) receive 60 - 124 hours of coach specific education and training. And 41% ICs receive the coach specific training as part of in-house program.

How Coaches in Indonesia are ready to invest time and money for their professional development continuously?

5. **Influence of culture on the understanding of Coaching in Asia**
   - The survey reconfirmed the observation from the 4th Coaching Survey that coaching is perceived slightly differently in Asia. Both companies and coaches acknowledge elements of guidance and expertise sharing involved in coaching. This comes out stronger from companies.

For Indonesia:

- 97% of the companies agree with the notion that coaching is facilitation, however, both companies and coaches continue to practice and include elements of guidance and knowledge transfer as part of coaching.

How Coaches in Indonesia could convey the value of coaching approach with company expectation to include elements of guidance and knowledge transfer?

6. **Affirmation of coaching impact and growing sophistication in consumer expectations**
    - **Coaching quality:** While 6 out of 10 companies expressed their satisfaction with the coaching services rating it very good/good, 3 out of 10 respondents were undecided on quality of coaching. 7% of the respondents were not happy with the quality of coaching services. This trend remains the same compared to 2017 survey
    - **Coaching benefits:** 84% of respondent companies see some impact of coaching on their business bottom line. Coaching seems to have a strong positive impact on individual performance and employee morale/engagement while organization performance, employee retention, revenue and profitability received a moderate positive impact. Only 16% reported no impact on the bottom line

For Indonesia:

- **Coaching quality:** Overall perceived quality of coaching services received by companies in Indonesia rated 'Very good' is 9% and 'Good' is 66%, 'Undecided' is 16 % while 'Not so good' and 'Not very good' is around 9 %.
- **Coaching benefits:** Strong positive impact observed on individual performance (66%) and employee engagement (54%) while moderate positive impact on revenue and profitability (bottom line) (64%). Only 9% reported no impact on bottom line

6. **Affirmation of coaching impact and growing sophistication in consumer expectations**
    - **Effectiveness of coaching process:** Organisations unanimously expected the coaching process to improve. The top three areas for

improvement being - clarity of coaching objectives, coachees' understanding of coaching and review of feedback at the end of coaching assignment. This remains the same top 3 areas as in 2017 survey data.
- **Fluid 'boundaries' of coaching process setup**: Majority of companies and coaches indicated that while there are joint agreements on coaching objectives, confidentiality arrangements and updates on the coaching progress from companies, they also request for coachees' assessment results and specific coaching content from the coaches.
- **Credentialing of new coaches:** Coaching experience is still ranked as the most important selection criteria for coaches, followed by chemistry, language and credentials (in no particular order).

For Indonesia:

- **Effectiveness of coaching process:** The top three areas for improvement being clarity of coaching objectives (99%), review/feedback of coaching assignment at the end of the session (99%), Coachee's understanding of what coaching is (100%).
- **Fluid 'boundaries' of coaching process setup**: Majority of companies and coaches indicated that while there are joint agreements on coaching objectives, confidentiality arrangements. For companies and External coach they use request information on coaching progress updates from the coach. They also request information on assessment result from the coach.
- **Credentialing of new coaches:** Coaching experience is still ranked as the most important selection criteria for coaches, followed by credentials, and language

7. **AI based coaching tools yet to be seen**
    - While a majority of companies and coaches indicated openness to using some form of technology in the future, as per the survey, 88% EC and 85% IC are not currently using any AI tool.

For Indonesia:

- Majority of coaches are not using any AI tools. Only 8% EC and 13% IC are using digital evaluation tools and apps.

8. **Future Outlook is positive**

- Companies plan to increase overall focus on coaching: They plan to build in-house capability (95%), use technology (78%), and increase the coaching budget (88%). While companies want to continue using external coaches, 97% say that they want to train their leaders to coach the team members and build a coaching culture in the company.
- Coaches perceive a positive future outlook with increase in demand and supply of coaching offerings. ECs and ICs are predicting an increase in all types of coaching services – 1-1 Coaching, Team Coaching and Coaching Skills training.

For Indonesia

- 100% Companies expect positive business growth in organization in the future. 95 % companies will train their leaders to coach their team, 93% will use coaching to support strategic planning, 90% will focus in building coaching culture, 82% will increase the use of internal coaches.
- ECs and ICs are predicting the increase in all types of coaching services. While one-to-one (EC 96%, IC 86%) and team coaching (EC 92%, IC 89%) continue to rise, coaching skills training (EC 88%,IC 84%) and coaching Apps, AI based tools (EC 79%, IC 71%) are also predicted to rise*.

In view of the COVID19 pandemic, the use of technology and AI tools is likely to increase manifold and perhaps rapidly. The first version of the report was generated in Jan 2020.

2. Demographics

2.1 Overall Study: Participants Overview & Distribution

A total of 1286 valid responses were received in this survey. The highest number of respondents came from Mainland China (355) followed by Indonesia (307). Out of the total number of respondents, ECs attributed half the total respondents, CRs one third and ICs about 10%. Overall, there are more female respondents than male and 74% took the survey in English.

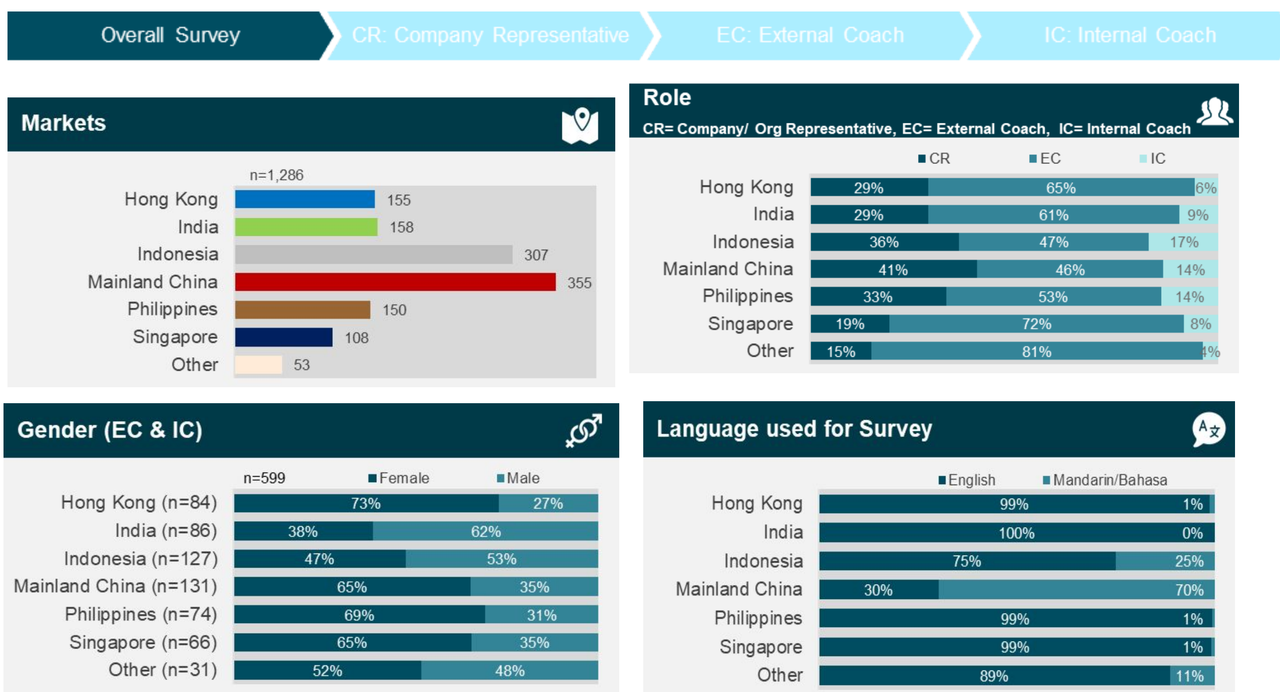
Overall Survey	CR: Company Representative	EC: External Coach	IC: Internal Coach

Markets	Hong Kong	155	12%
	India	158	12%
	Indonesia	307	24%
	Mainland China	355	28%
	Philippines	150	12%
	Singapore	108	8%
	Others	53	4%
	Total	**1,286**	***100%***
Role	External Coach	703	55%
	Organization Representative	427	33%
	Internal Coach	156	12%
	Total	**1,286**	***100%***
Gender Only (EC+IC)	Male	250	42%
	Female	349	58%
	Total	**599**	***100%***
Language used for survey	English	951	74%
	Mandarin	258	20%
	Bahasa Indonesia	77	6%
	Total	**1,286**	***100%***

2.2 Overall Study: Participants Overview & Distribution by Market

Across all markets, the number of IC respondents are relatively lower than ECs and CRs. Mainland China, Indonesia and the Philippines have a relatively wide spread of respondents from ECs and CRs while Hong Kong, India and Singapore, the majority of respondents were from ECs.

Majority of participants responded the survey in English while 70% respondents in Mainland China used Mandarin and 25% in Indonesia used Bahasa Indonesia.

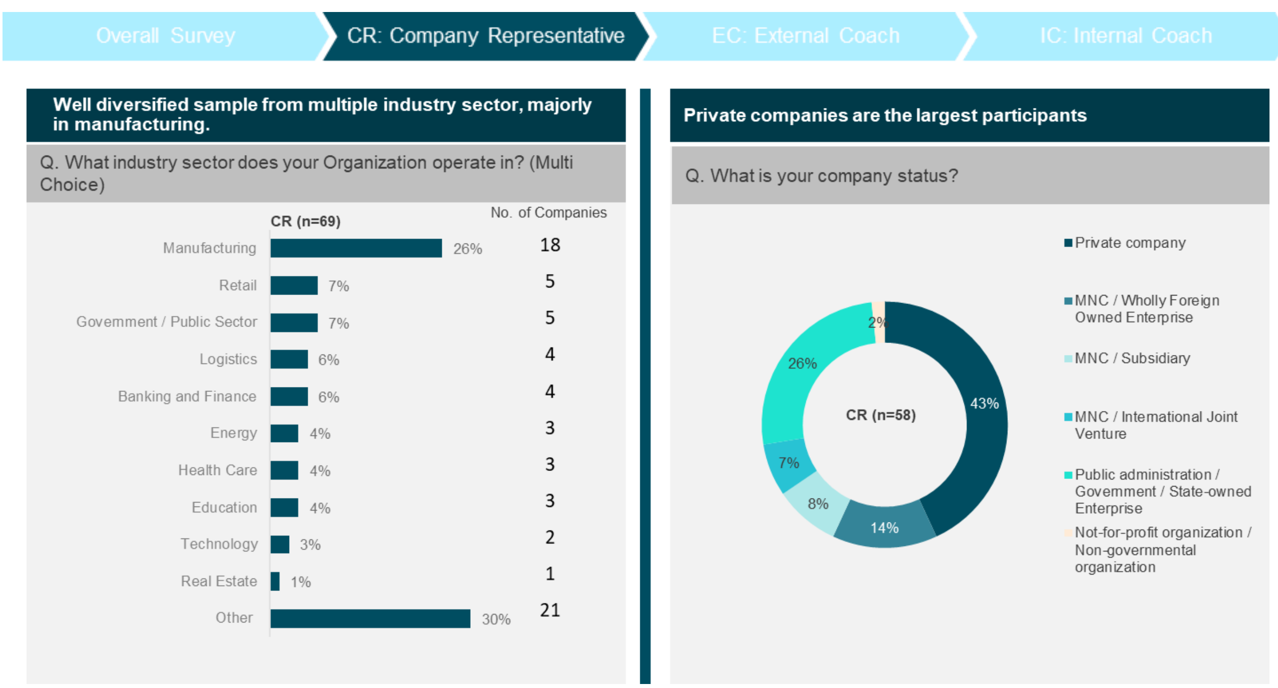


2.3 Participating Organizations - Distribution by industry sector and type

The survey indicates a well diversified sample from a large number of industry sectors. The highest CR respondents came from manufacturing company (26%), retail and government/public sector 7% for each. Logistic, banking & finance 6% for each, energy, healthcare and education 4% for each. Technology 2% and real estate 1%. Suprisingly, education only 4%. Coaching is one of people development approach, education industry should adopt it to unleash students' potential.

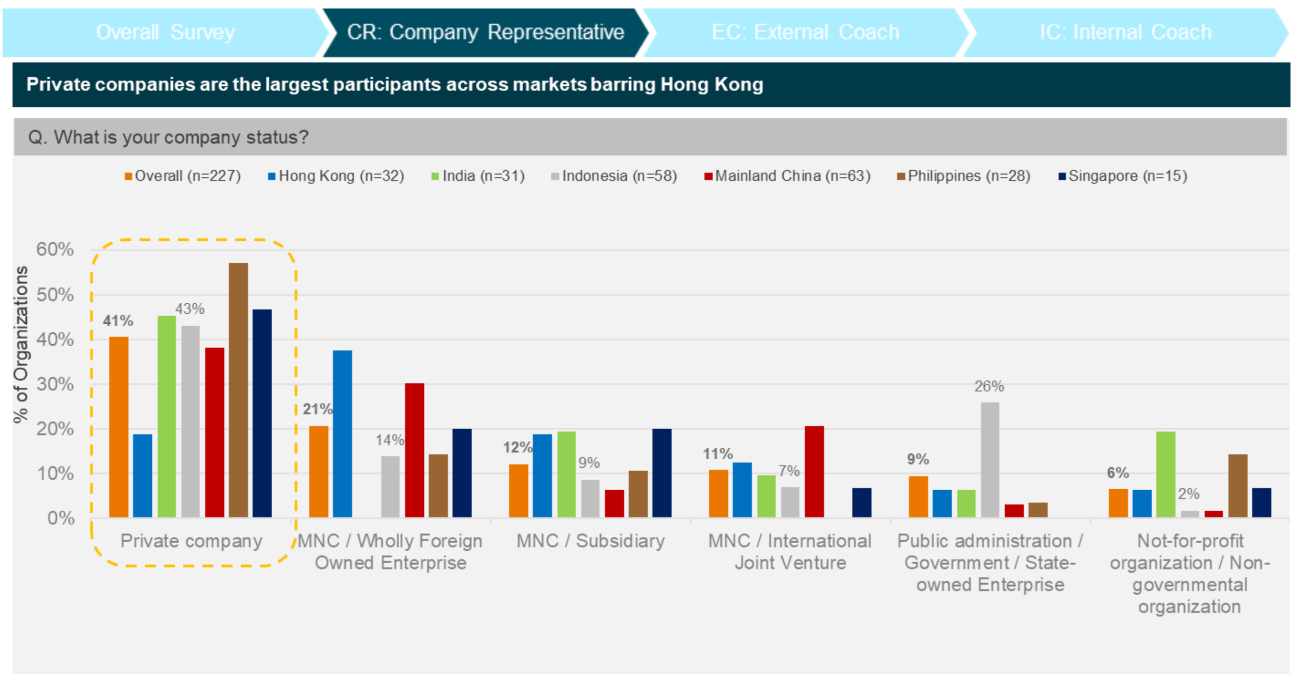
Private Companies, MNC, and Public and Government sector constituted the largest proportion of respondents.

Private companies constituted 43% of the sample followed by MNCs 29%, Public and Government sector 26%, and NGO 2%



2.4 Types of Participating Organizations

For Indonesia, private company (43%) and Public / government/state owned enterprise (26%) have biggest portion for participation in this research. Followed by MNC (Wholly foreign owned enterprises, Subsidiary and International join venture) with total 29 % and NGO 2 %

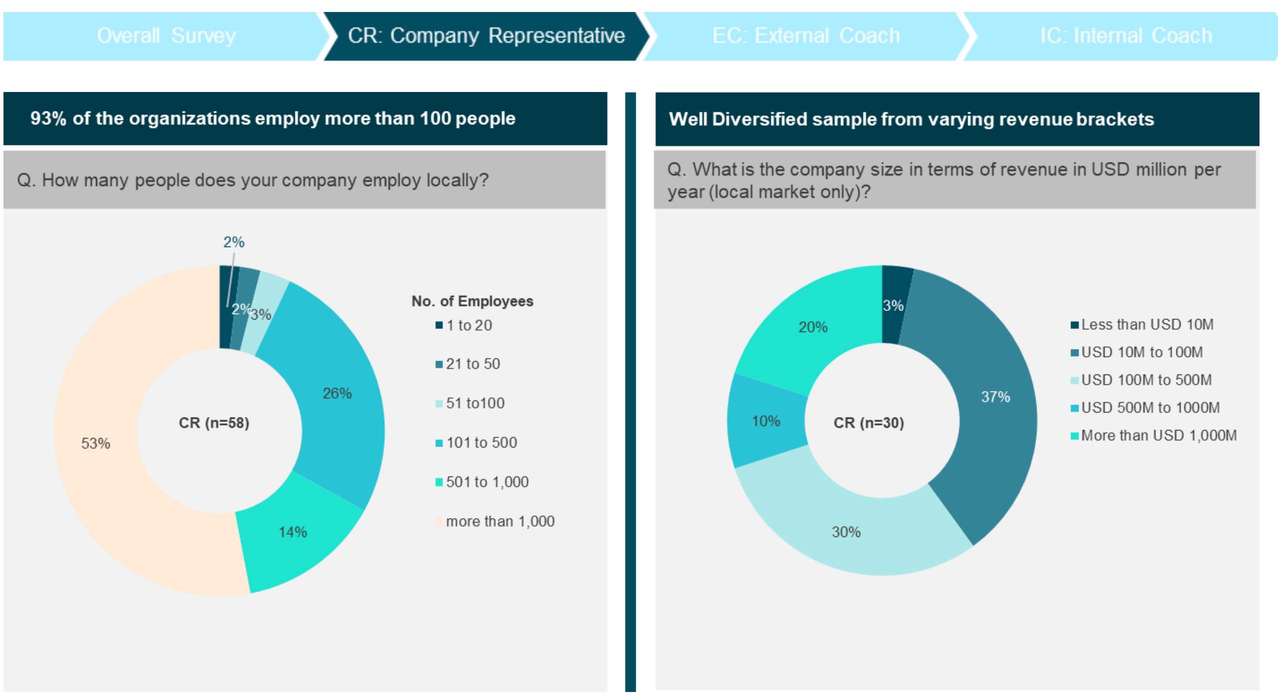


2.5 Participating Organizations – Distribution by Employees and Revenue

In Indonesia, The survey has reached out to companies of varying employee size ranging from less than 100 employees (7%), 101-1000 (40%) and more than 1000 employees (53%).Comparing with other markets in this survey, Indonesia has higher respondents of company with more than 1.000 employees.

Well diversified sample from varying revenue brackets ranging from less than USD10M (3%), USD 10M - 100M (37%), 100 – 500M (30%) , 500M- 1000M (10%) and more than USD 1,000M (20%).

Comparing with data on number of employees, Indonesia company participation on this survey dominate by company with revenue around 10 – 500 USD Million/ year. Meaning that company with higher number of employee participated more than company with higher revenue

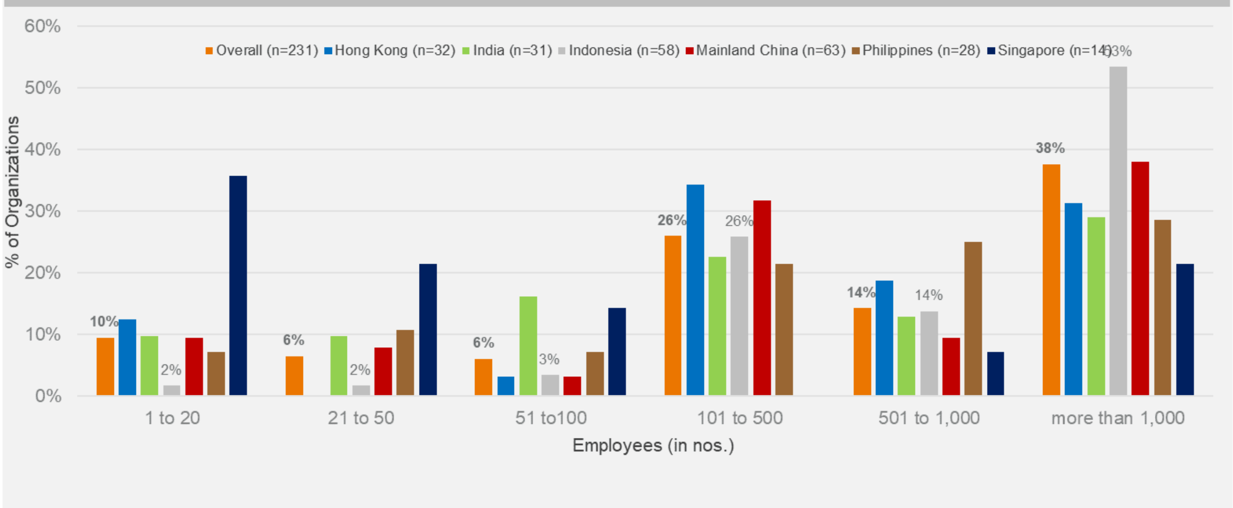


2.6 Participant organizations by Number of Employees

Overall Survey | **CR: Company Representative** | EC: External Coach | IC: Internal Coach

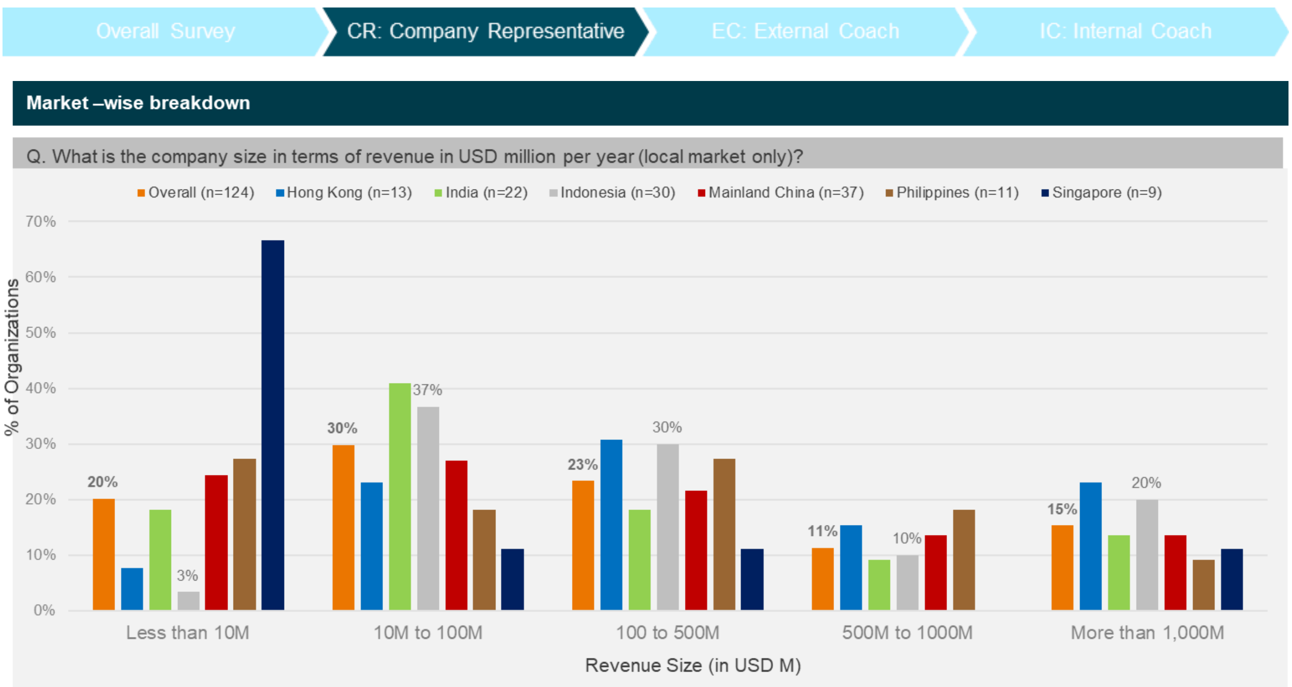
Employee population sample size varied in different markets

Q. How many people does your company employ locally?



2.7 Participating Organizations by Revenue Size

30 % of the companies' sample reached this survey have a revenue size of 10 to 100 million USD

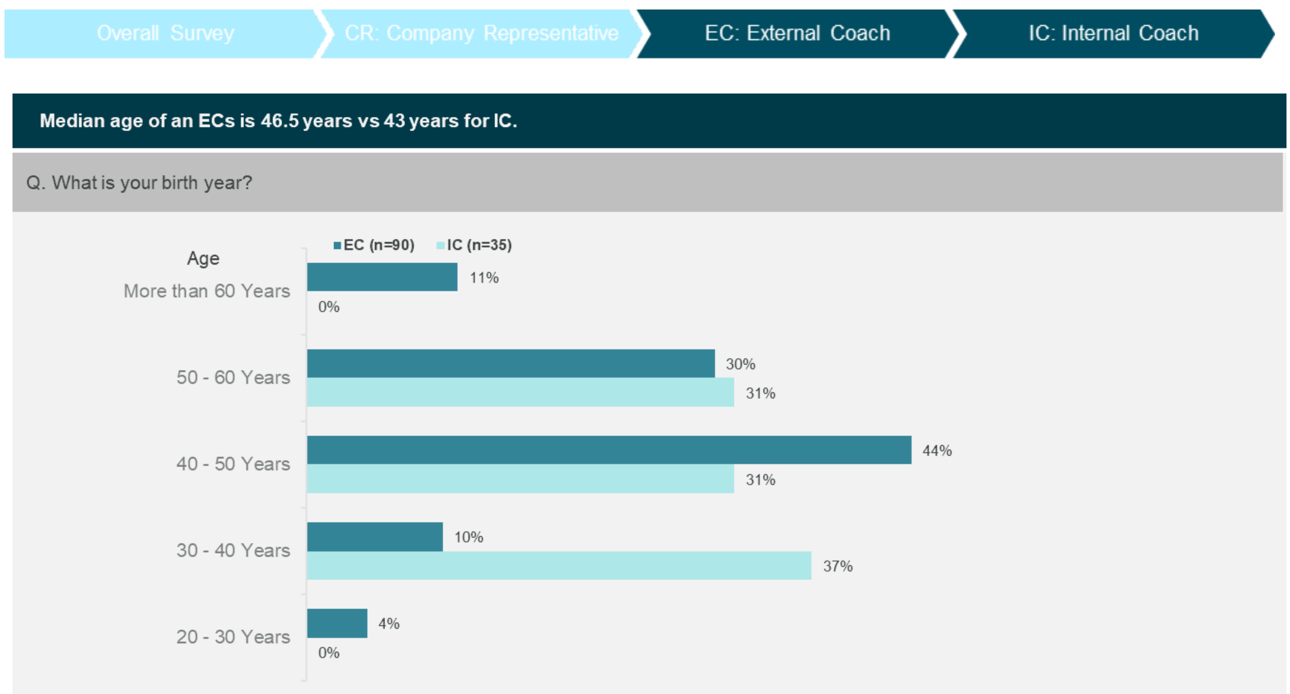


2.8 Distribution of Coaches by Age

44% of the ECs are in the age range of 40-50 years, 50% are 50-60 years, 11% more than 60 years, 10% 30-40 years and only 4 % are 20-30 years

37% of the ICs are in the age range of 30-40 years, 31% are 40-50 years and 31 % 50 to 60 years.

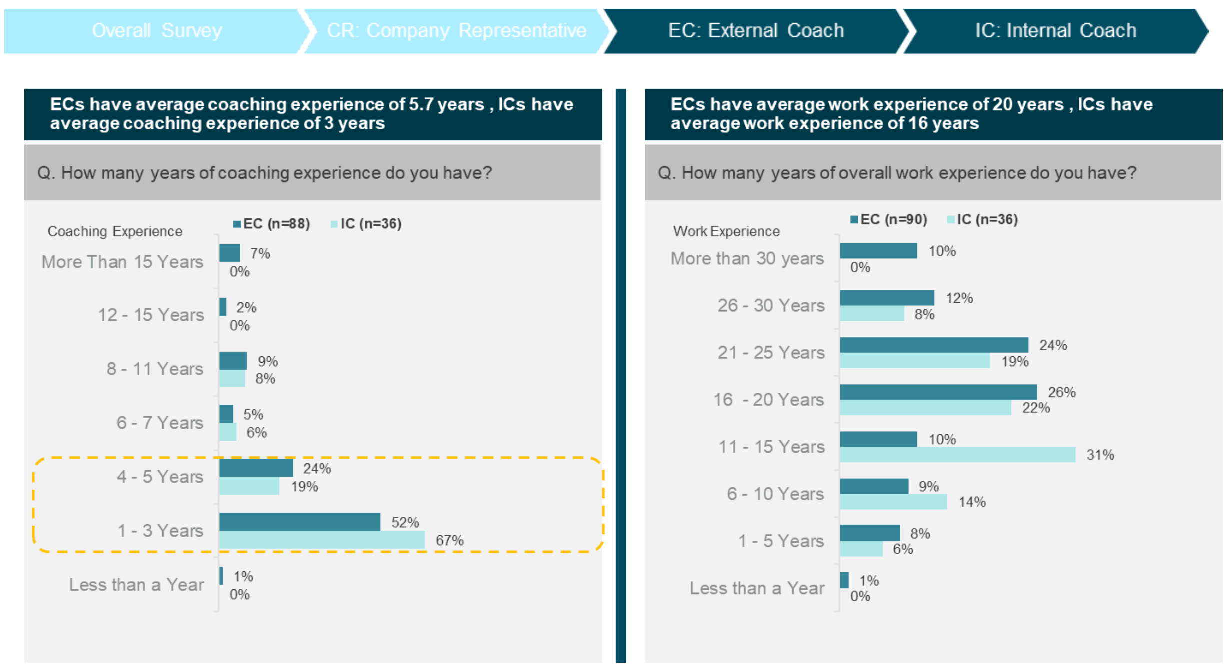
85% 0f EC are more than 40 years old, while 68% of IC are less than 50 years old.



2.9 Distribution of Coaches by Years of Experience

EC Profile – Coaching industry is quite new in Indonesia, it is showed by 52% of EC having 1- 3 years coaching experiences, followed by EC with 4- 5 years coaching experience (24%) and 72 % EC have more than 15 years overall work experiences.

For IC profile, showing that 67% having less than 3 years coaching experiences, and 51% have less than 15 years overall work experiences.



Something to ponder

With the development of coaching in Indonesia, how new coaches ensure the quality of coaching?

2.10 Typical EC Participant

The ECs in Singapore, India and HK have more coaching experience than the ECs in the Phillipines, Mainland China and Indonesia

Overall Survey | CR: Company Representative | **EC: External Coach** | IC: Internal Coach

The ECs in Singapore, India and HK have more coaching experience than the ECs in the Philippines, Mainland China, and Indonesia

	Female Coaches	Average Age (Yrs)		Coaching Experience (Yrs)		Overall Work Experience ≥ 20 years
		Median	Mean	Median	Mean	
Hong Kong (n=76)	74%	51.0	50.5	8.0	9.1	80%
India (n=76)	39%	52.0	52.9	8.0	9.9	85%
Indonesia (90)	54%	46.5	46.9	3.0	5.7	60%
Mainland China (n=103)	67%	46.0	46.3	4.0	6.8	72%
Philippines (n=58)	69%	51.0	53.0	5.5	6.8	76%
Singapore (n=58)	64%	50.0	51.8	9.0	10.4	80%
Other (n=30)	53%	51.5	50.2	7.0	11.0	77%
Overall (n=491)	**60%**	49.0	**49.7**	5.0	**7.9**	**75%**

*n may vary for each column depending on how many answered those questions

2.11 Typical IC Participant

The ICs in Singapore, India have more coaching experience than the ICs in HK, the Phillipines, Mainland China and Indonesia

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

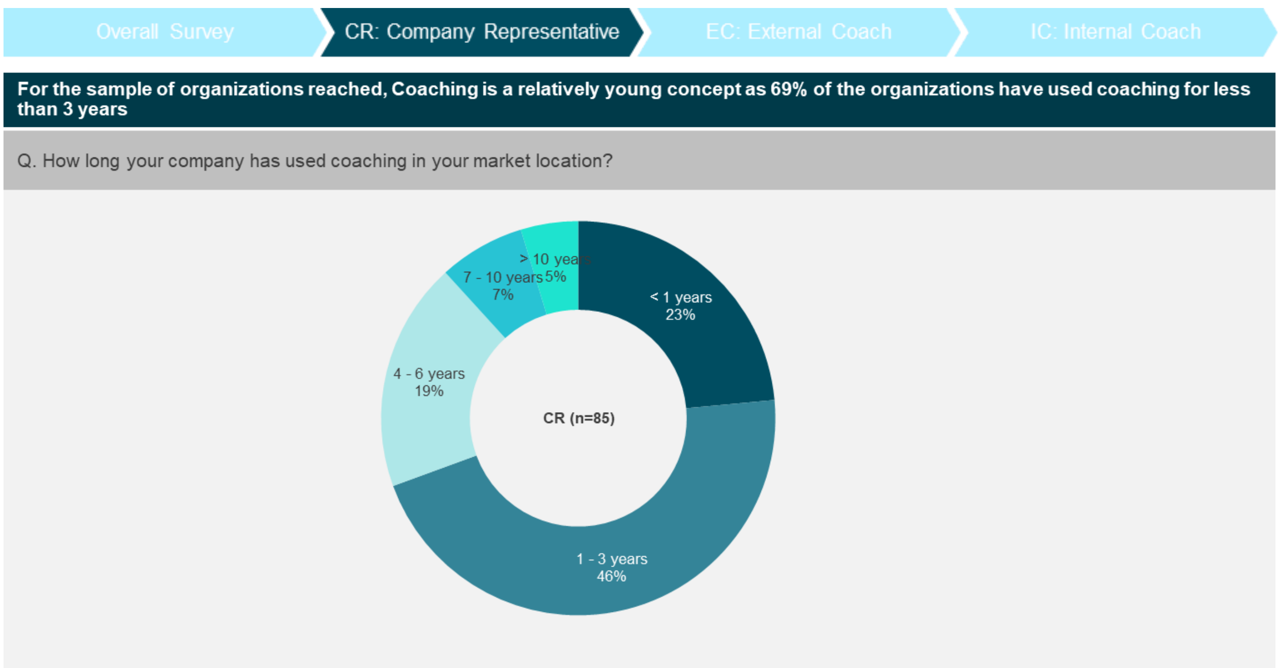
The ICs in India and Singapore have more coaching experience than the ICs in HK, The Philippines, Mainland China, and Indonesia						
	a	Average Age (Yrs)		Coaching Experience (Yrs)		Overall Work Experience ≥ 20 years
		Median	Mean	Median	Mean	
Hong Kong (n=8)	63%	48.5	46.1	5.5	6.0	75%
India (n=10)	30%	53.5	52.1	12.5	13.8	70%
Indonesia (n=37)	30%	43.0	42.8	2.0	3.2	44%
Mainland China (n=28)	57%	39.0	39.6	2.0	3.3	32%
Philippines (n=16)	69%	40.0	41.4	3.0	4.3	56%
Singapore (n=8)	75%	49.0	47.3	9.0	8.8	88%
Other (n=1)	0%	36.0	36.0	4.0	4.0	0%
Overall (107)	48%	42.0	43.2	3.0	5.0	50%

*n may vary for each column depending on how many answered those questions

3. Landscape of Coaching Market

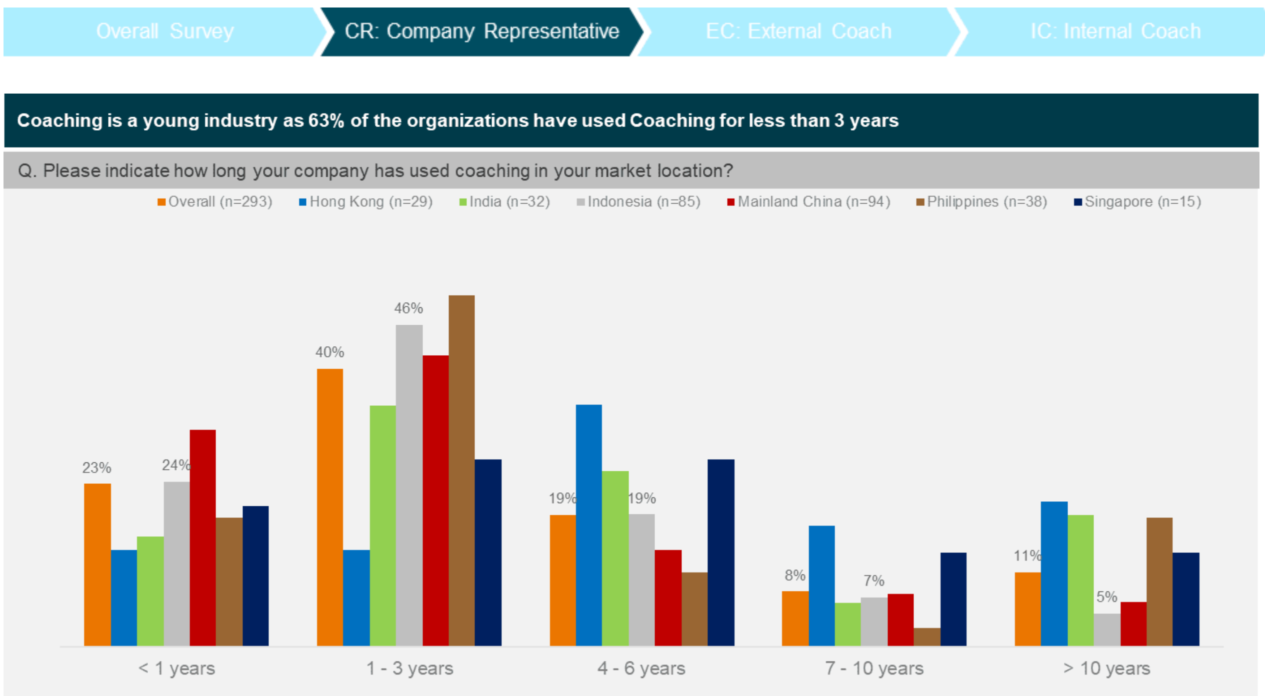
3.1 Prevalence of Coaching Services

Indonesia is young in coaching service which is showed 69% has 3 years of experience and less, and only 5% with more than 10 years of experiences and more



3.2 Prevalence of Coaching Services

Relatively recent growth in Indonesia, Philippines, Mainland China and India where more companies have used coaching for less than 3 years. Hong Kong and Singapore are relatively mature markets with more companies have used coaching for 4-6 years.



3.3 Adoption of Coaching Industry

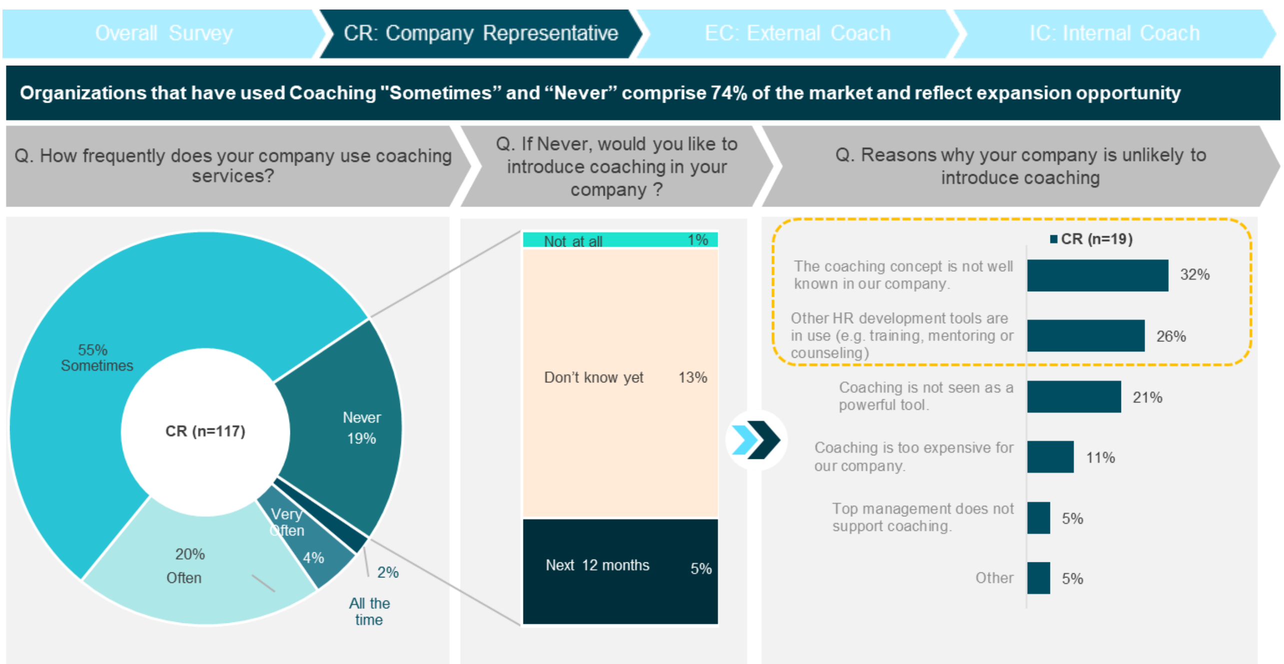
Organization that have used coaching 'sometimes' and 'never' comprise 74% of the market and reflect expansion opportunity. Of the 19% said 'never' used coaching, 13% indicated that they don't know yet whether they introduce coaching or not to their company, and 5 % indicated that they intended to adopt coaching in the next 12 months.

The top three reasons for companies to not introduce coaching are :

a) coaching concepts is not well known in the company (32%),

b) other HR development tools are in use (26%),

c) coaching is not seen as a powerful tool (21%)



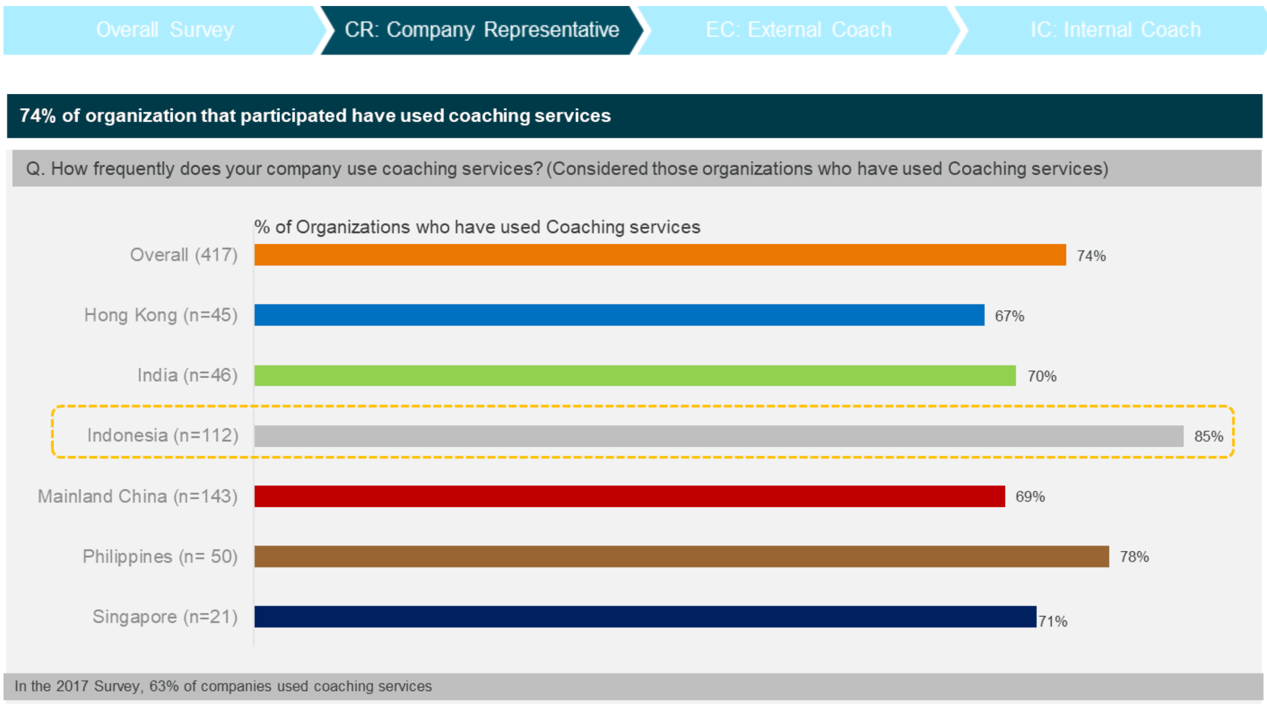
Something to ponder:

Given the barriers that maybe stopping companies from adopting coaching, what strategies can coaches have to manage the cost benefit arbitrage as perceived by the companies?

Can technology play a role in making coaching more cost effective?

3.4 Usage of Coaching Services - by Market

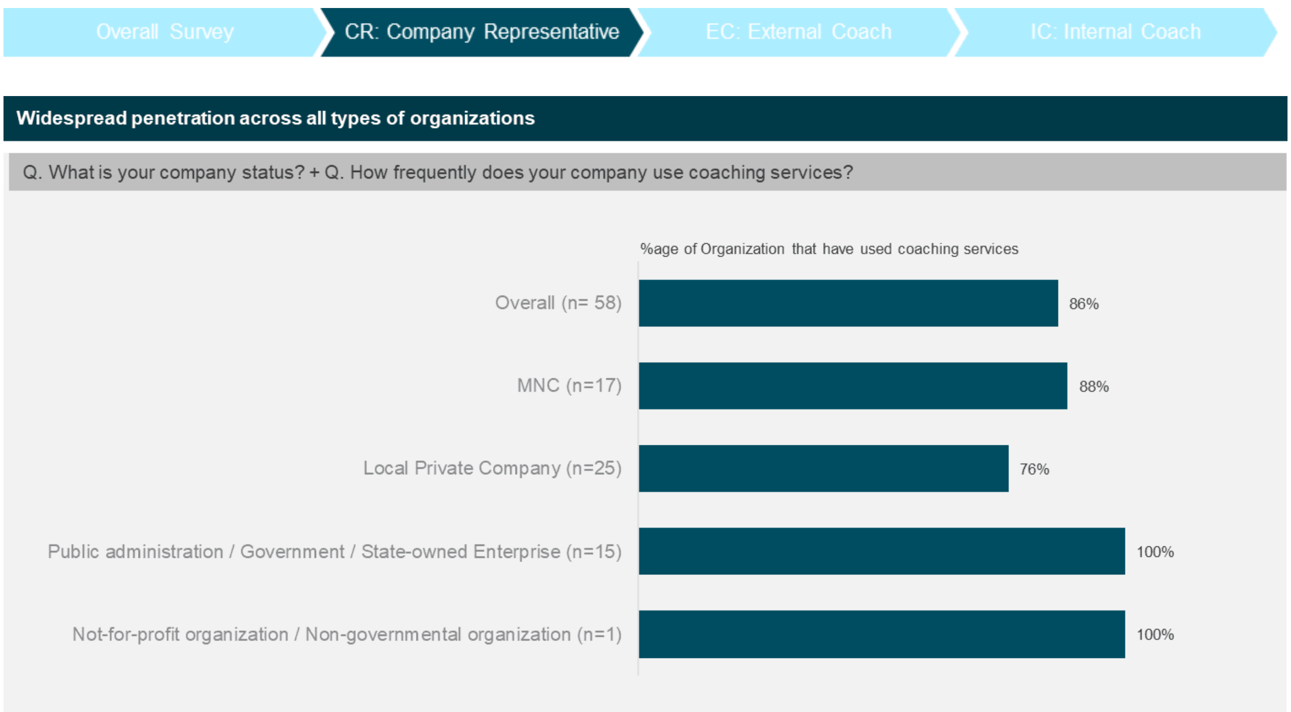
85 % of organization that participated in Indonesia have used coaching services.



3.5 Coaching Services Adoption by Nature of Organization

Widespread penetration across all types of organizations.

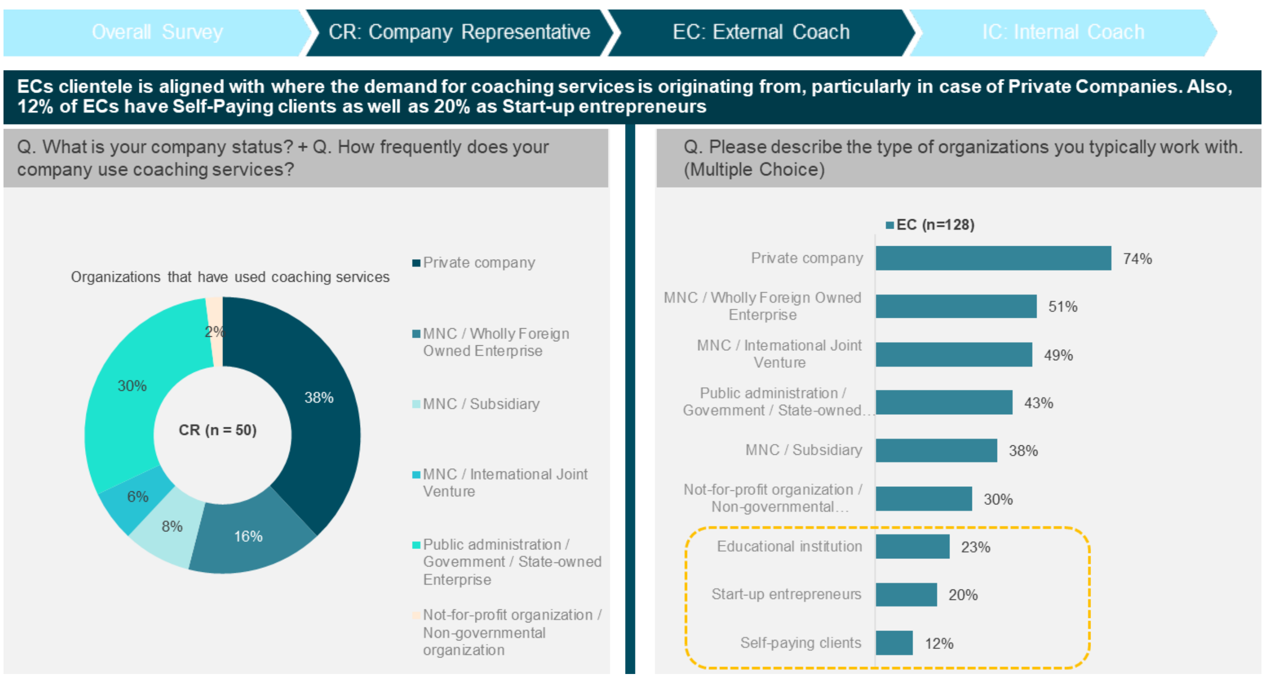
While local private companies are the largest sector (76%) using coaching service, 88% of MNCs, 100 % of the government and public sector companies and 100 % of the NGOs reached have used coaching services



3.6 Target Clientele

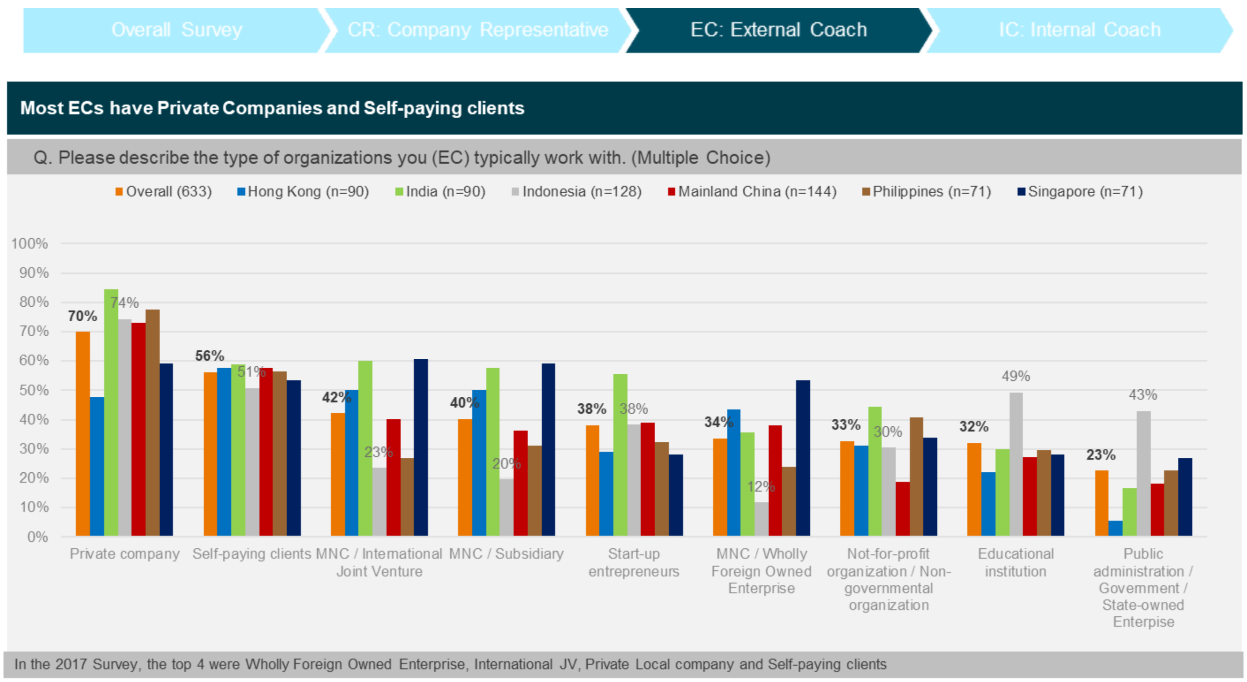
EC clientele is aligned with where the demand for coaching services is originating from, particularly in case of private companies. 74% of the ECs are working with private companies and 51% say they also work with MNCs.

Also, 12% of ECs have self-paying clients, 23% as educational institution as well as 20% as start up entrepreneurs.



3.7 EC Target Clientele – By Market

Across all markets, Private Companies and Self-paying clients top the list as the most relevant client group for ECs. MNCs are the third largest with the highest for Singapore (approx. 60%) and lowest in Indonesia (approx. 30%). Prevalence of coaching in non-profit sector is highest in India while coaching in the Educational and Public sector is the highest for Indonesia



Something to ponder:

Coaching is permeating deeper into the market. There is opportunity for growth and expansion into new industry sectors. What will the coaching industry need to do to be able to effectively meet this demand?

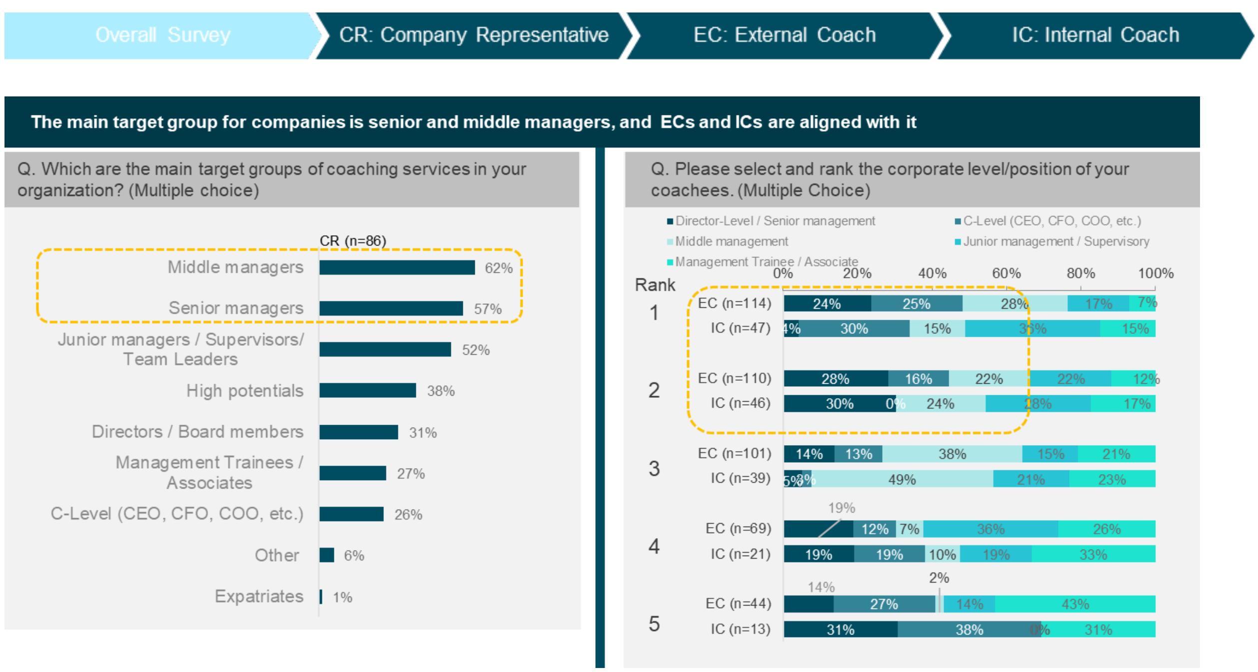
3.8 Target Groups for coaching services

The main target group for companies is senior and middle managers, and ECs and ICs are aligned with it.

Highest target group receiving coaching services in a company is middle managers (62%), Senior managers (57%) followed by Junior managers/supervisor/team leaders (52%).

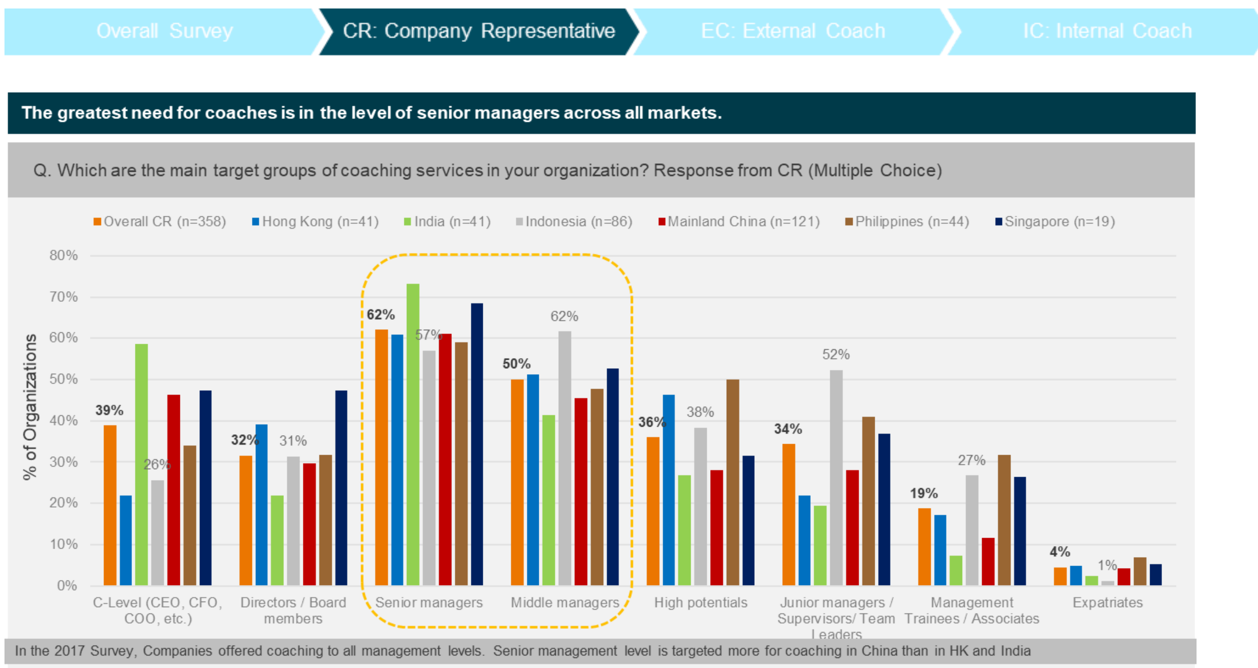
While 31 % companies say they are offering coaching for Director/Board member (31%), 26% to C-Level and 38% to High potentials.

When we compare to EC and IC, we find their main clients are also from senior and middle management.



3.9 Target Groups for Coaching Services - By Market

The main target groups for coaching services is senior and middle manager level across all markets. In Indonesia Junior managers/Supervisors/ team leader are also target groups for coaching service.



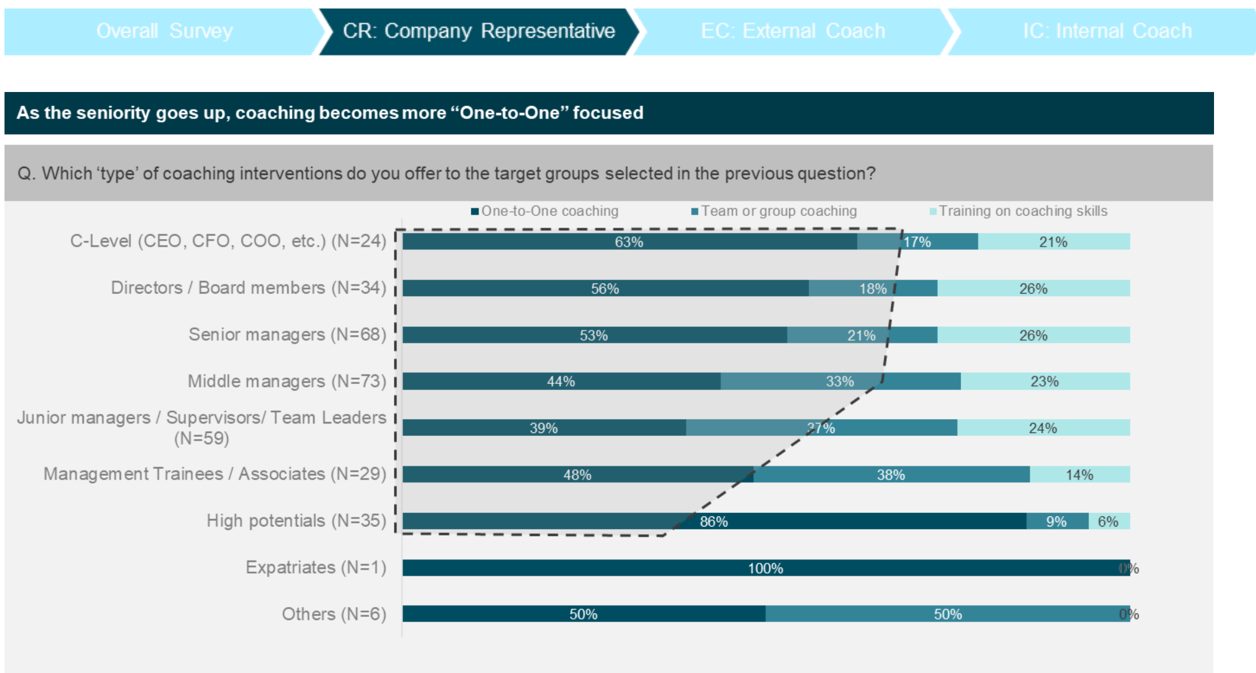
3.10 Types of Coaching Intervention - By Target Groups

As seniority goes up, coaching becomes more 'one on one' focused.

For middle and junior management there is more focus on group/team coaching (33 % and 37%)

Almost half of the companies say they offer one-to-one coaching to management trainees (48%)

86% of High Potentials are receiving one to one coaching.



Something to ponder

It's encouraging to know that companies are offering coaching skills training at all levels, it will be interesting to explore how companies are integrating this with company culture and business practices.

Its also interesting to see team or group coaching are also offered almost at all levels, how team or group coaching intervention can give impact to their team or group performance.

3.11 Preferred language for coaching

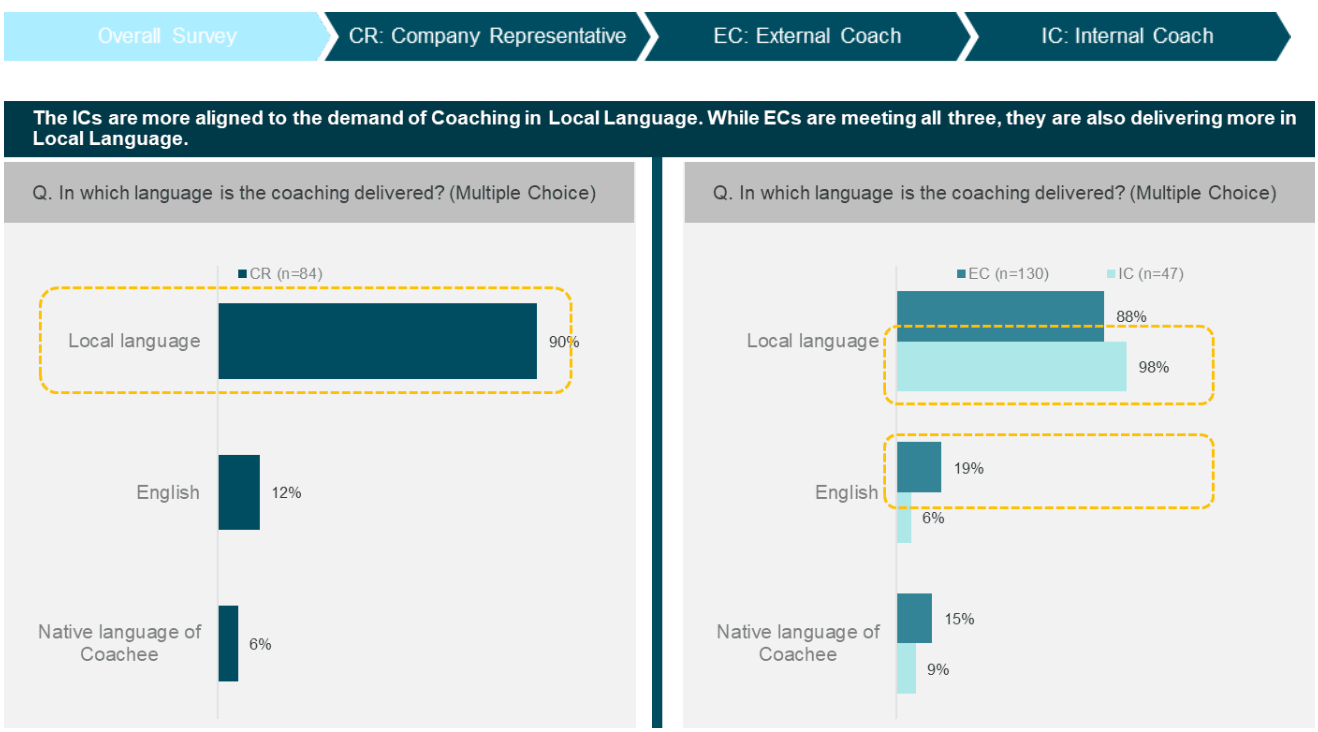
The ICs are more aligned to the demand of coaching local language. While ECs are meeting all three, they are also delivering more in local language.

For companies coaching in the local language is the most prevalent (90%), followed by English (12%) and native language (6%)

For ICs coaching in the local language is the most prevalent (98%) followed by english (6%) and native language (9%)

ICs are more aligned to the demand of coaching in the local language

For ECs coaching in local language is the most prevalent (88%) followed by English (19%) and and native language (15%)



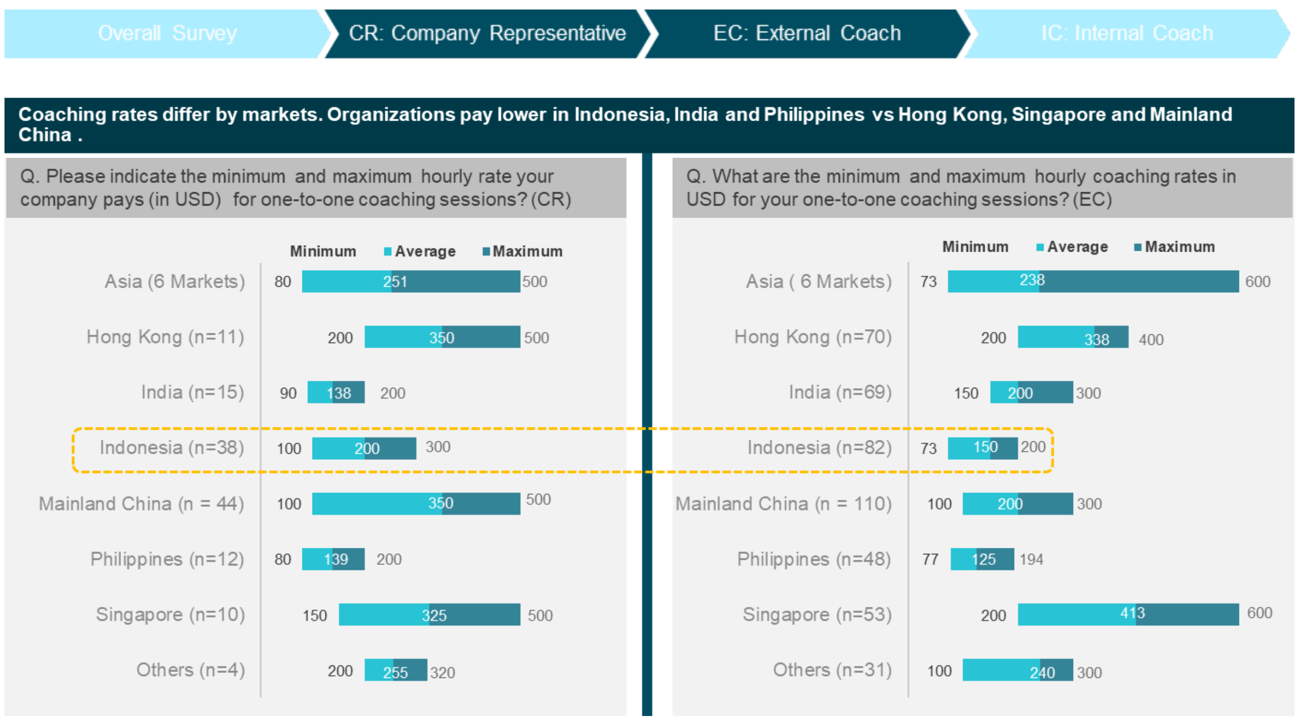
3.12 Coaching Rates

Coaching rates differ by markets.

Coaching rates range from USD80 to 500 across the markets, with the average rate of 251

Coaching rates are lowest in India (138), Philippines (139) followed by Indonesia (200). Average coaching rates are higher for Singapore (325) Hong Kong and Mainland China (350).

This is by large similar to what ECs reported, except in markets like India, Mainland China and Singapore (refer to market reports)



Something to Ponder:

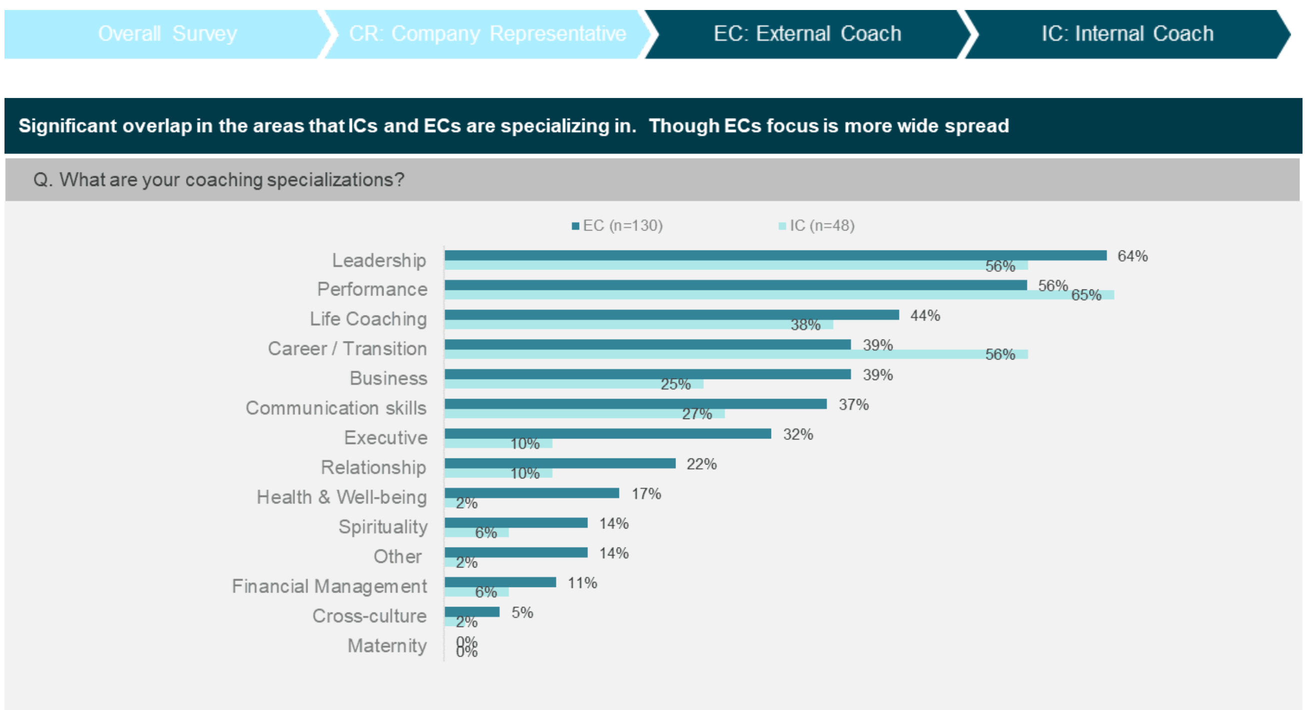
How Indonesian coaches can set up the benchmark for coaching rates?

3.13 Coaching Specializations

Significant overlap in the areas that ICs and ECs are specializing in. Though ECs focus is more wide spread.

Leadership and performance coaching are the top coaching specialisations. ECs are more focused on Leadership, performance and life coaching while ICs are focus on performance, career and leadership.

ECs are creating new and unique niches for themselves like Life Coaching, Business coaching, Relationship, Health and Wellness, Cross-culture, Spirituality and more.



Something to ponder:

As the market new creative applications of coaching are becoming more prevalent as we see the emergence of new niche specializations, how do we ensure quality?

How do coaches (new and experienced) stay relevant in response to competition and changing needs?

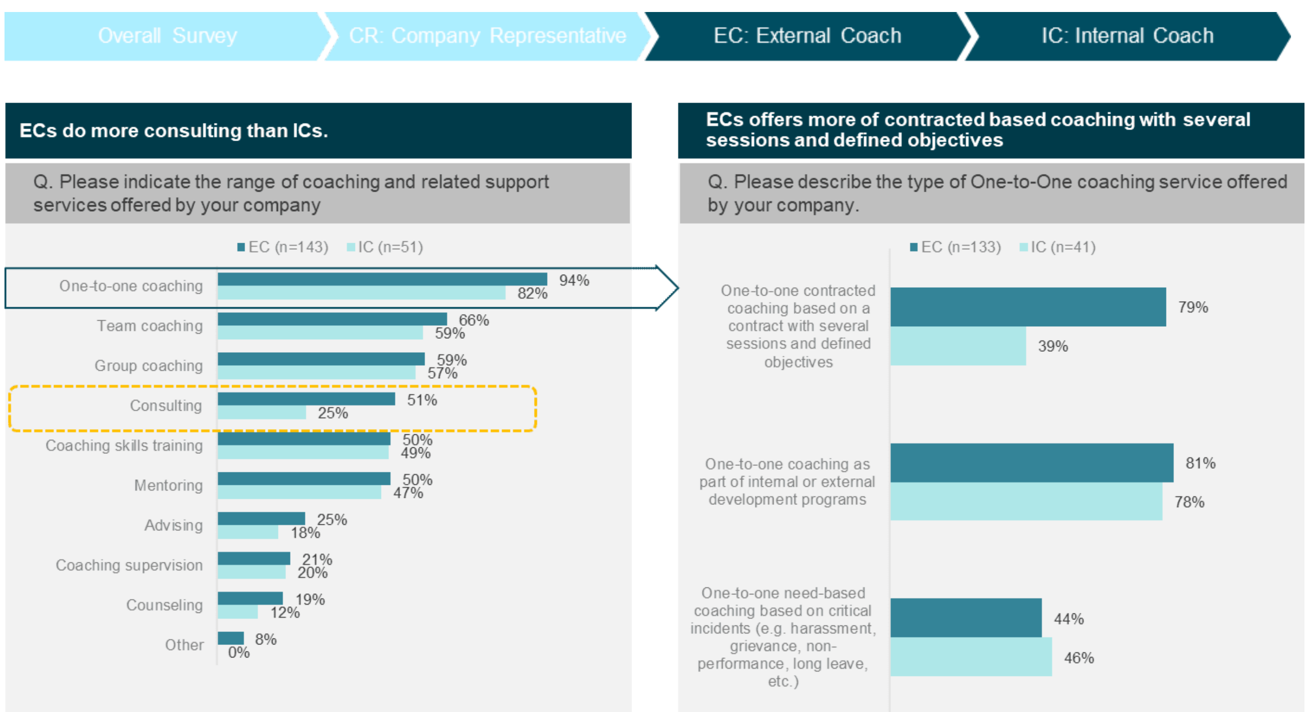
3.14 Range of Coaching & Related Services

One on one coaching is the most proportion in delivering coaching activities for external coaches (94%) and internal coaches (82%), followed by team coaching (ECs:66%, ICs:59%) and group coaching (ECs:59% and ICs:57%). For external coaches, beside one on one coaching, they also have higher proportion on consulting comparing with internal coaches (ECs:51% , ICs: 25%).

Both ECs and ICs offer coaching skills training to the same extent (ECs: 50%, ICs:49%)and also mentoring (ECs:50%,ICs:47%)

ECs offer significantly more contract-based one-to-one coaching as compared to ICs (79% vs 39%) and for one-to-one coaching as part of development programs ICs 78% and ECs 81% . This is understandable as ICs offer coaching as part of their job role.

Need-based coaching and coaching on critical incidents like performance, harassment etc. is offered equally by both EC and IC (44% and 46%)



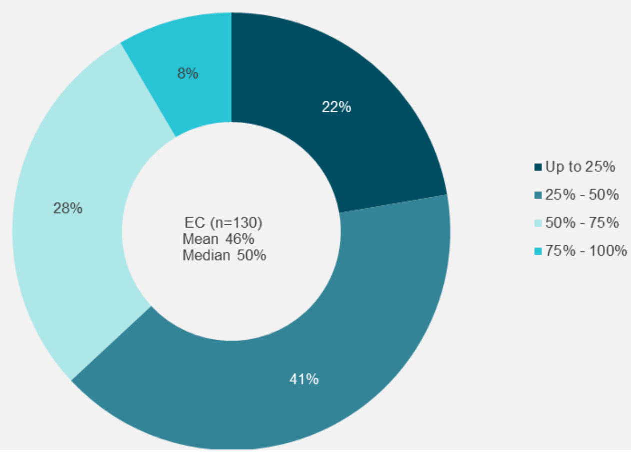
3.15 Proportion of Work-time Devoted to Coaching Sessions

On an average, ECs spend 46% of their total working time on delivering coaching sessions.

Overall Survey | CR: Company Representative | **EC: External Coach** | IC: Internal Coach

On an average 46% of the time is spent on coaching sessions

Q. What proportion of your working time is allocated to coaching sessions?

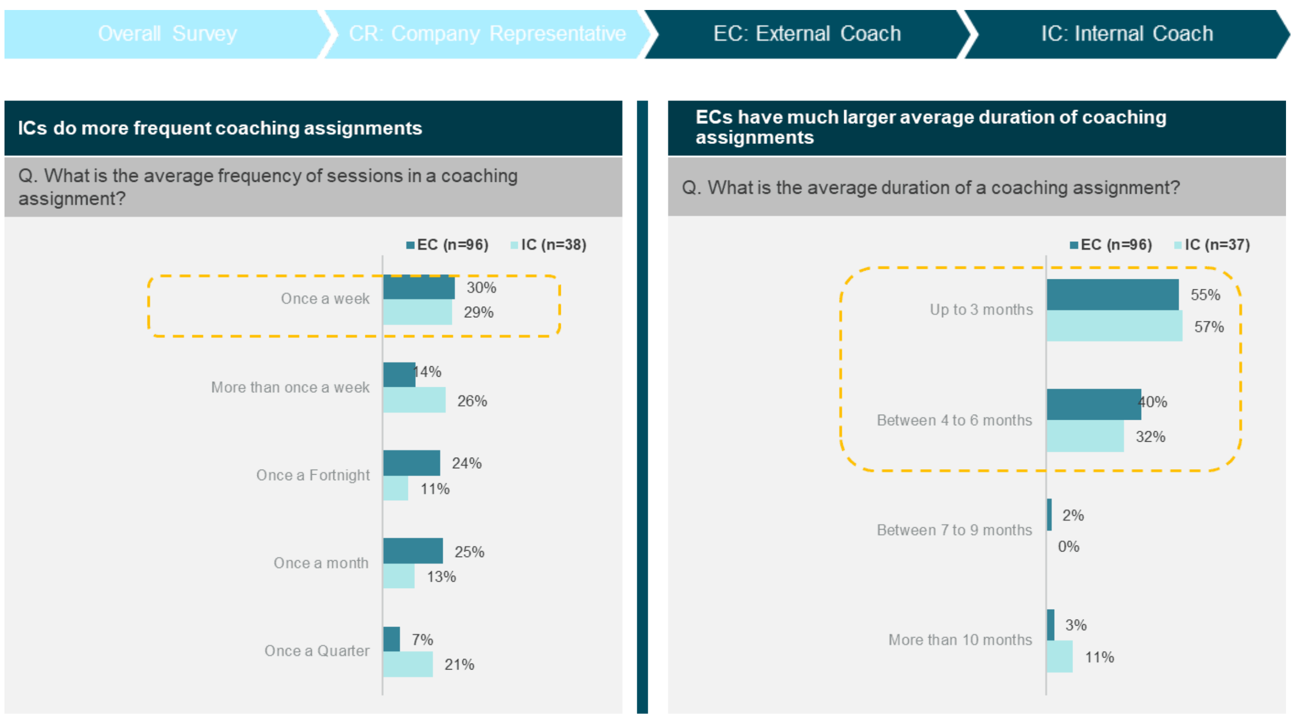


3.16 Frequency and Duration of Coaching Assignments

ICs deliver one-to-one coaching sessions more frequently, while ECs offer coaching assignments of a longer duration

ICs deliver coaching sessions more than once a week (26%), once a week (29%) and monthly (13%) and a coaching assignment lasts for less than 3 months (57%) for up to 6 months (32%)

ECs deliver coaching sessions once a week (30%), Once a fortnight (24%) and monthly (25%) and a coaching assignment usually up to 3 months (55%) and lasts for 4 to 6 months (40%)

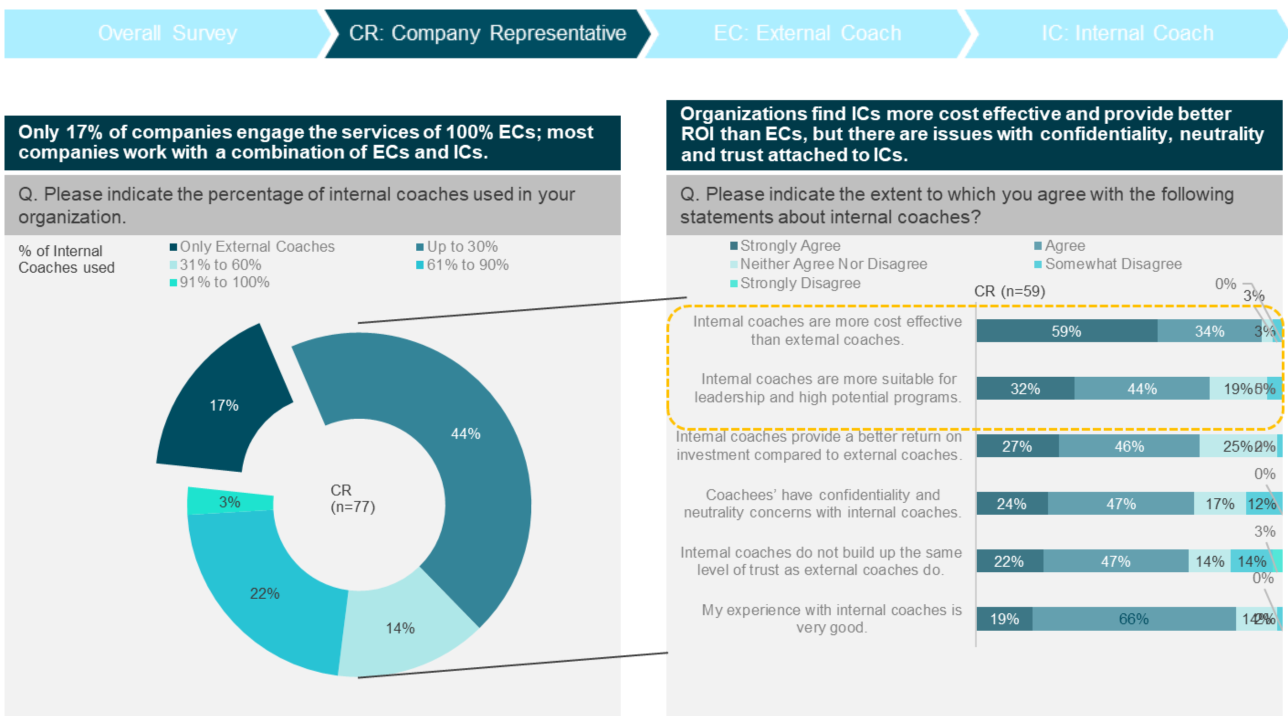


3.17 Engagement and Perception of Internal Coaches

Only 17% of companies engage the service of 100% ECs (only ECs),most companies work with a combination of ECs and ICs.

Organizations engage with internal coaches because : ICs are more cost effective, ICs are more suitable for leadership and high potential programs, and internal coaches provide a better return on investment compared to external coaches.

However, there are issues with confidentiality, neutrality and trust attached to ICs.



Something to ponder:

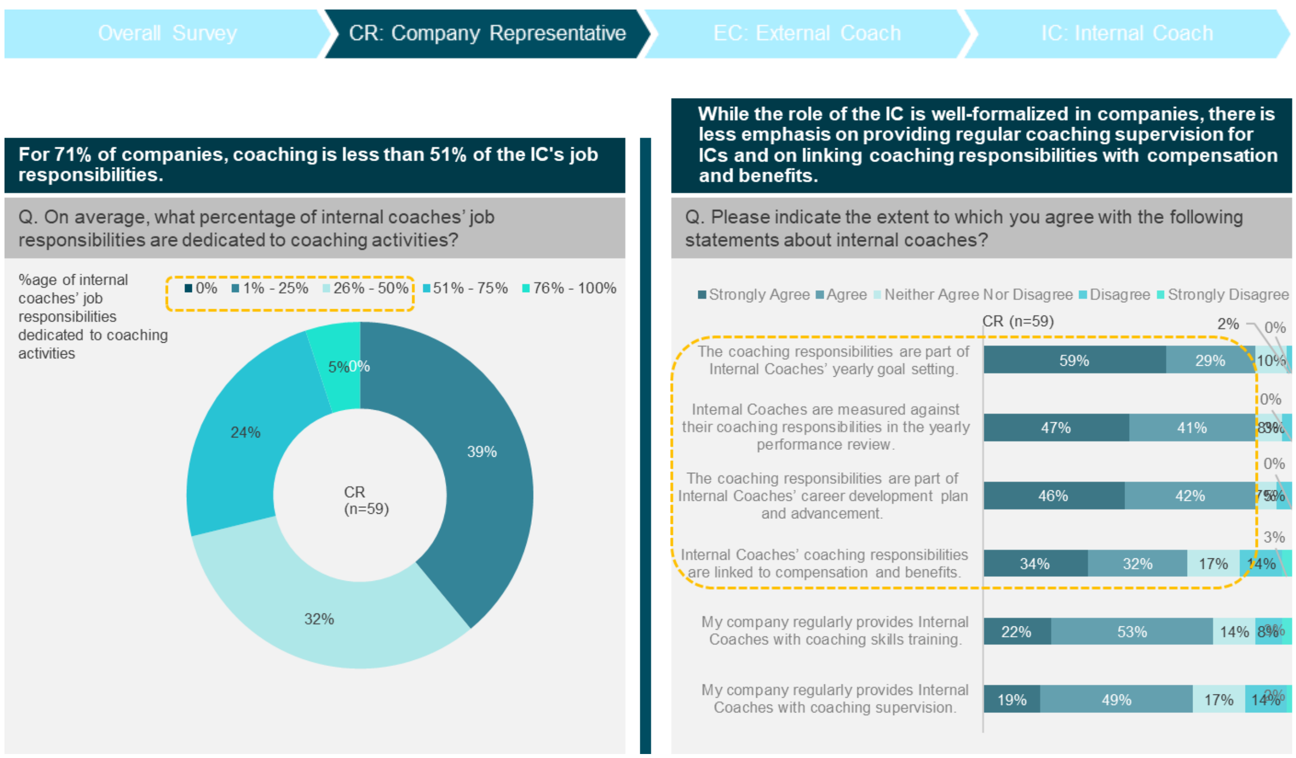
With a relatively high number of coaches engaged in internal coaching how do companies ensure the quality of coaching and How to manage standardization of coaching quality and how do they tackle the neutrality, confidentiality and trust concerns?

3.18 Responsibilities of Internal Coaches

For 71% of companies, coaching is less than 51% of internal coaches job responsibility.

While the role of the IC is well formalized in companies, there is less empahasis on providing regular coaching supervision for ICs and on linking coaching responsibilities with compensation and benefit.

IC Coaching responsibilities are a part of their annual goal setting (88%), career development plan (88%) and performance review (88%).



Something to ponder:

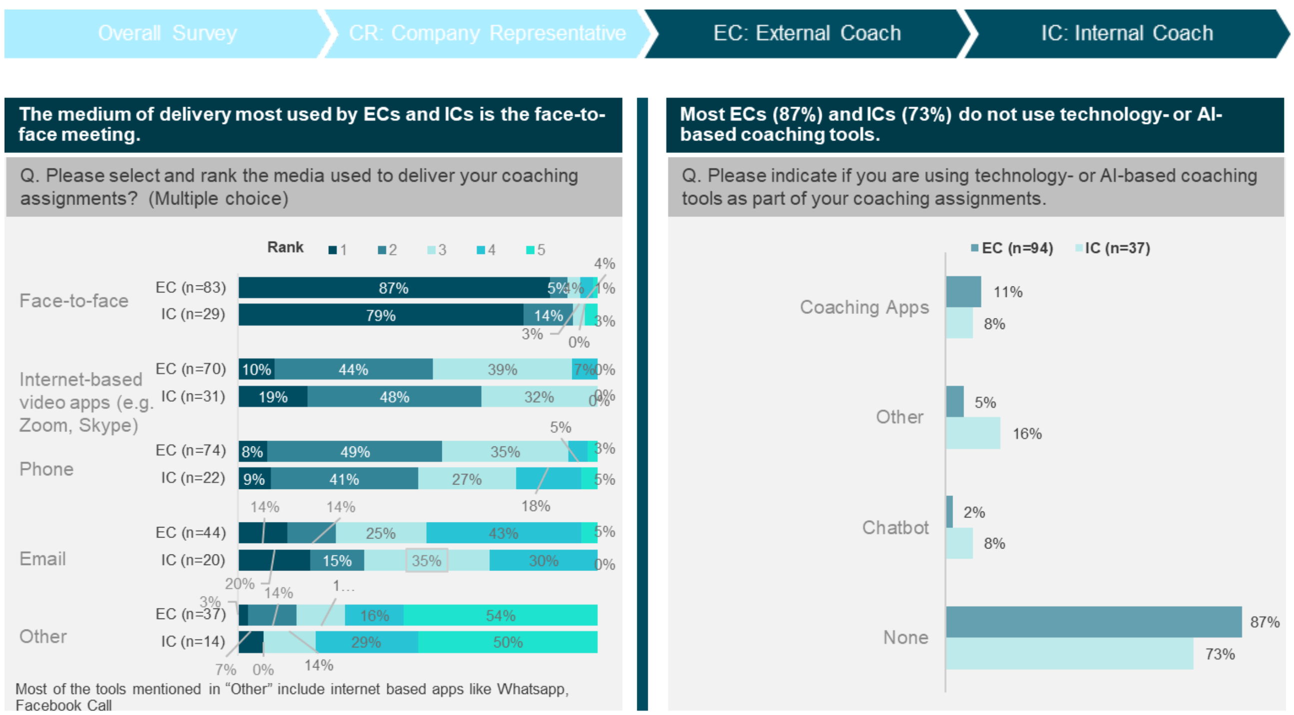
As companies strive to build internal capabilities for the future, how do they see this role evolve in the overall organization? How internal coaches manage their capacity and balance between their role and function as well as their coaching service.

3.19 Medium of Coaching Assignment Delivery

The medium of delivery most used by ECs and ICs is the face to face meeting (87%EC and 79% IC), followed by virtual video apps such as zoom or skype.

And it is related that 87% ECs and 79% ICs do not use technology or AI based coaching tools. Only 11 % EC and 8% IC use coaching apps.

Perhaps AI has not yet extensively penetrated the coaching industry in Indonesia market.

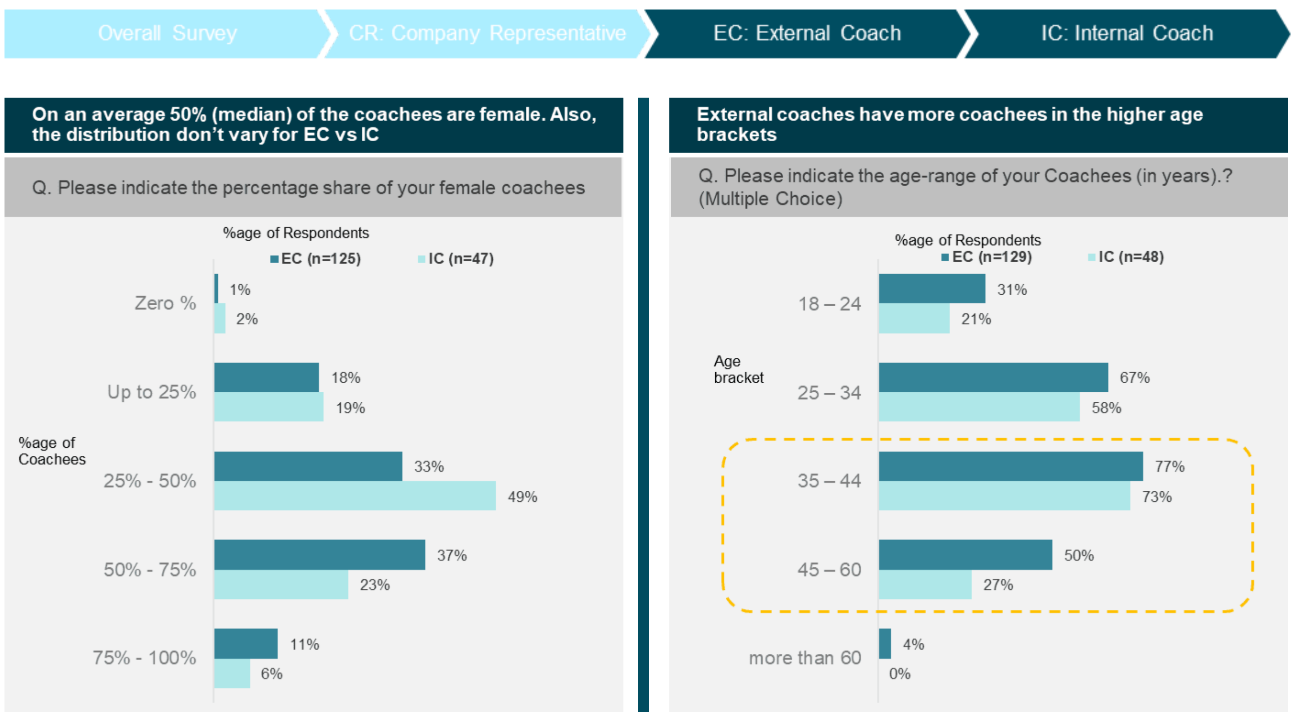


3.20 Profile of Typical Coachee

On an average 50% of the coachees are female, and the distribution does not vary for ECs and ICs.

ECs have more coachees in the higher age brackets. The age-range of coachees for ECs is 25 – 60 years, with the highest being 35-44 years (77%) followed by 25-34 years (58%) and 45-60 years (50%). The age-range of coachees for ICs is 25-44 years, with the highest being 35-44 years (73%) and 25-34years (58%).

It is also interesting to note that both EC (31%) and IC (21%) have coachees in the age-range of 18-24 years.



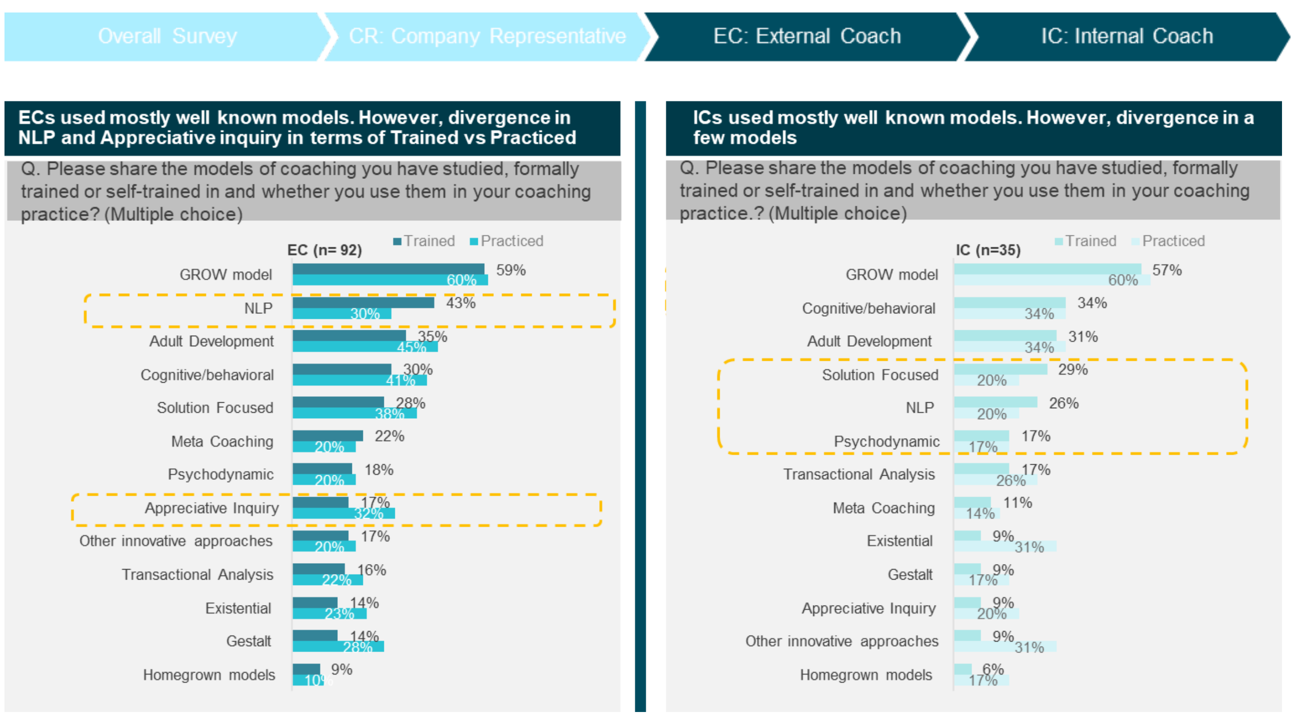
3.21 Coaching Models – Trained vs Practiced

ECs used mostly well known models, such as Grow model (69%), NLP (30%), Adult development (45%).

However, there are divergence in some coaching practiced vs trained. 43% ECs say they have trained in NLP and 30% say they practice it in coaching. 17% ECs say they have trained in Appreciative Inquiry and 32% say they practice it.

ICs also used mostly well known models. 57% ICs are trained in GROW model, 60% say they practice it. 34 % ICs are trained in Cognitive behavioral model and 34% say they practice it.

Some divergence also found in ICs, 29% ICs are trained in Solution focus and 20% say they practiced it. 26% ICs are trained in NLP and 20% say they practice it.

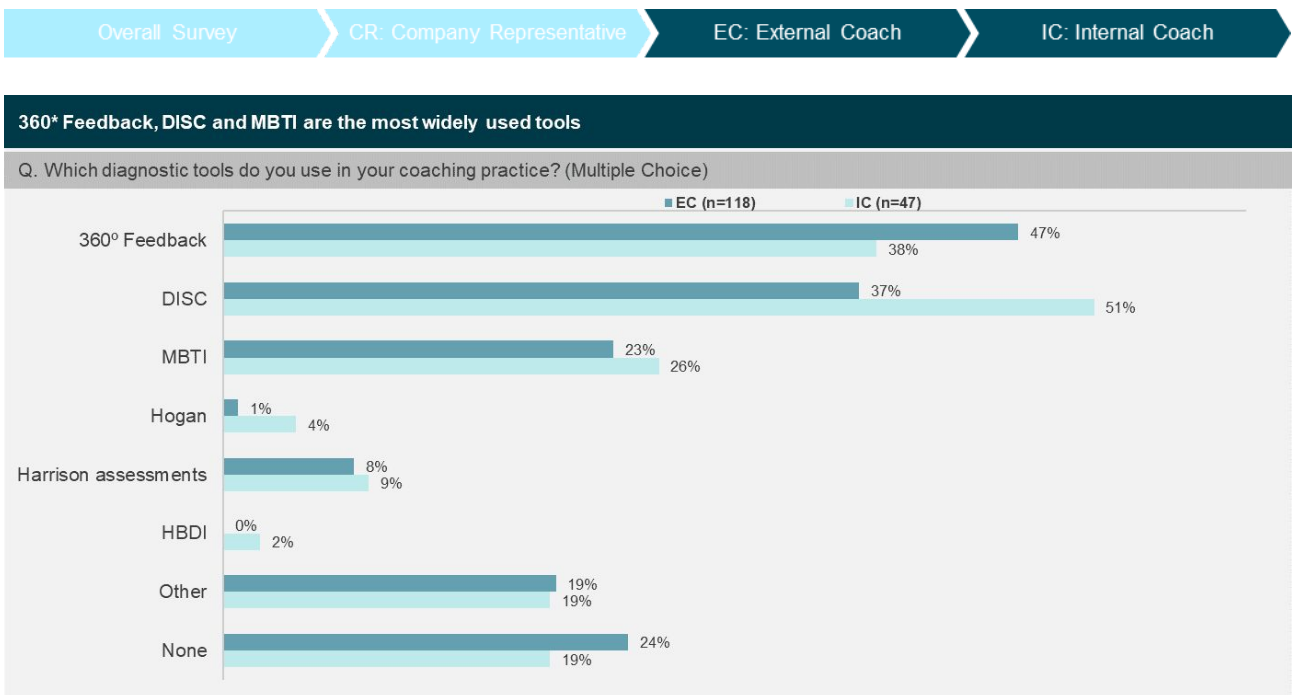


3.22 Usage of Diagnostic Tools

360 degrees feedback (EC 47%, IC 38%), DISC (EC 37%,IC 51%) and MBTI (EC 23% , IC 26%) are the most widely used tools for diagnostic.

19 % ECs and ICs are using a variety of other diagnostic tools

24% of ECs and 19% of ICs are not using any diagnostic tools, in order to measure progress of coaching activities .



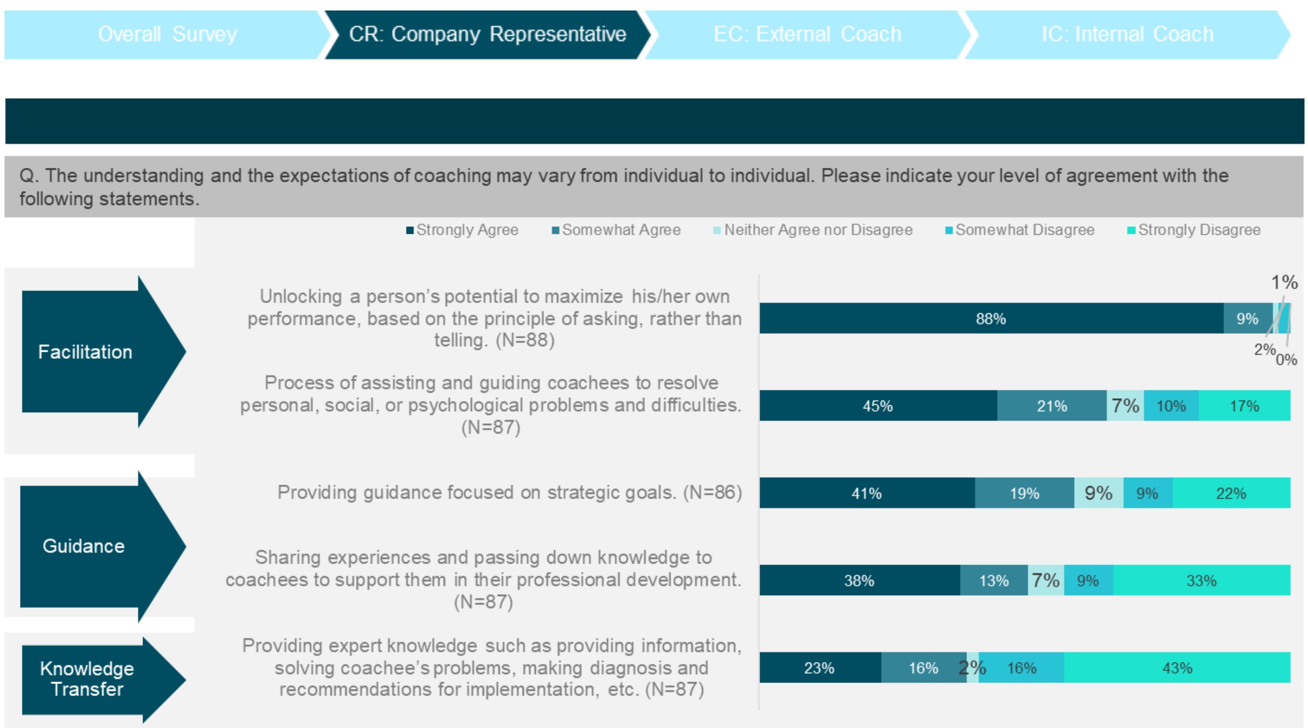
4. Coaching beliefs and philosophy

3.1 Understanding of Coaching

Definition of coaching provided by professional bodies such as ICF, EMCC and others is commonly meant to be facilitation of self help. However, both companies and coaches continue to practice and include elements of guidance and knowledge transfer as part of coaching.

The first chart points out that 97% of the sample companies agree with the notion that coaching is facilitation.

The prevailing understanding of coaching can be subsumed under the term Facilitation. It refers to the general idea of facilitating self-help, holding back own beliefs and encouraging the coachee.



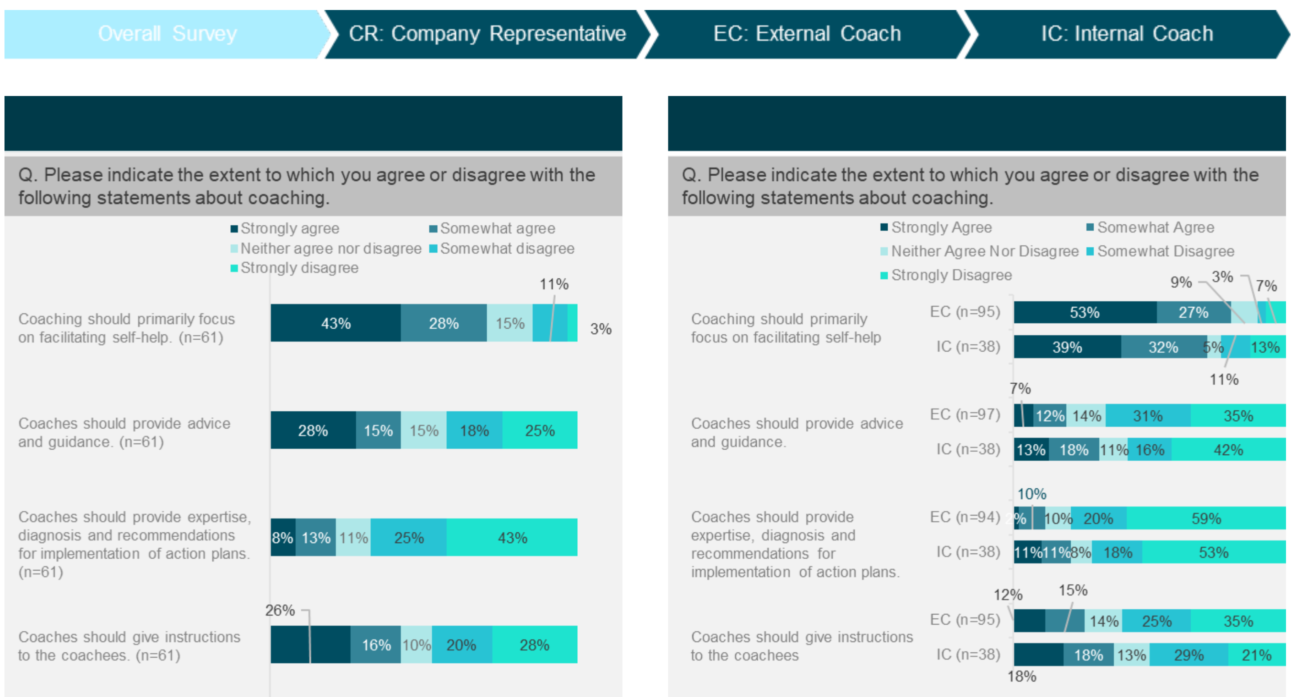
3.2 Understanding of Coaching

When asked if coaching should focus primarily on facilitating self help, the percentage dropped for both companies (72%) and coaches (80%).

Interestingly, If we just look at ‘strongly agree’, percentage dropped significantly from 72% to 43% for companies and 53% for coaches. This shows both companies and coaches acknowledge that there are elements other than facilitating self help in coaching (guidance, sharing expertise, recommendations) and this comes out stronger from companies in the second chart.

While percentage of companies preferred facilitation, guidance and problem solving were 71%, 43%, 21% respectively, the same number for EC’s is 80%, 26% and 20% and for IC’s stood at 71%, 21% and 22%.

There is also a tendency for Guidance as a second factor and even providing solution.

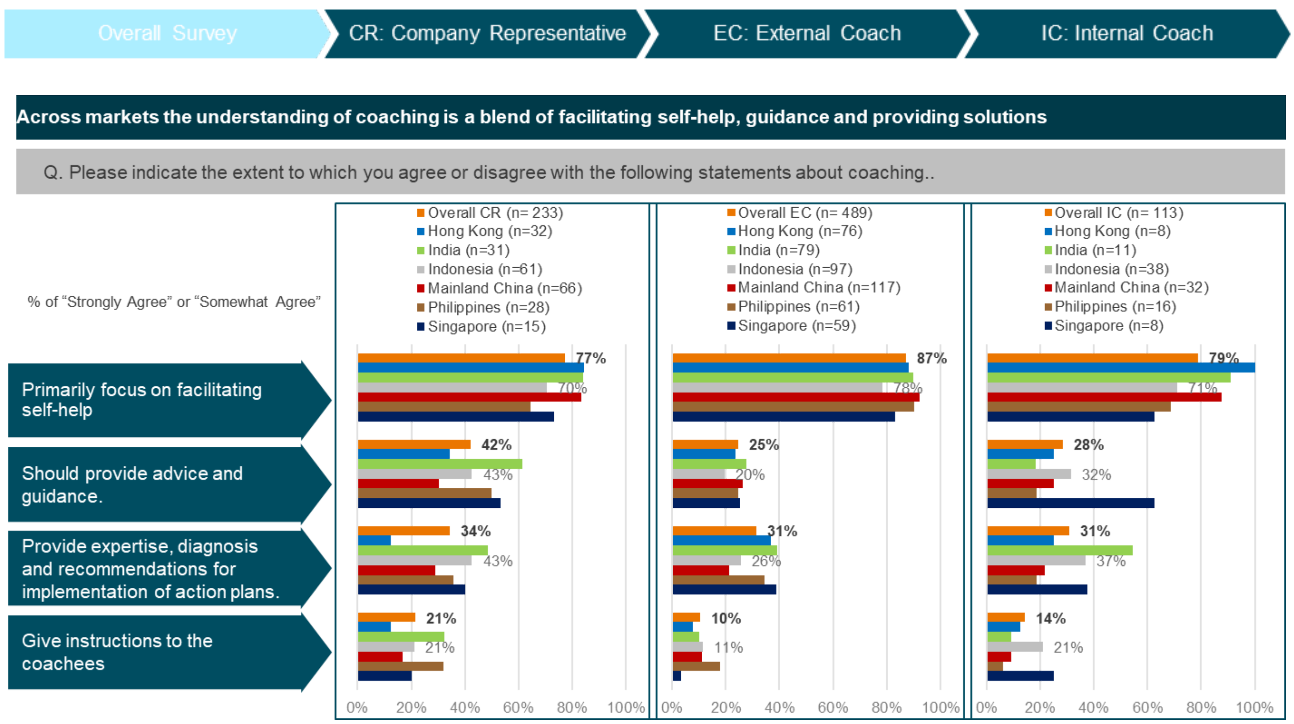


3.3 Understanding of Coaching – By Market

Similar trends appear in all six markets

Across markets the understanding of coaching is a blend of facilitating self-help, guidance and providing solutions. Also the variance between expectations of coampanies and coaches is also observed across markets. Regarding the different markets, there is not much difference concerning the facilitation factor.

Same with others, Indonesia primarily focus on facilitating self-help; 70% for CRs, 78 % for ICs and ECs stand at 71%.



Something to ponder:

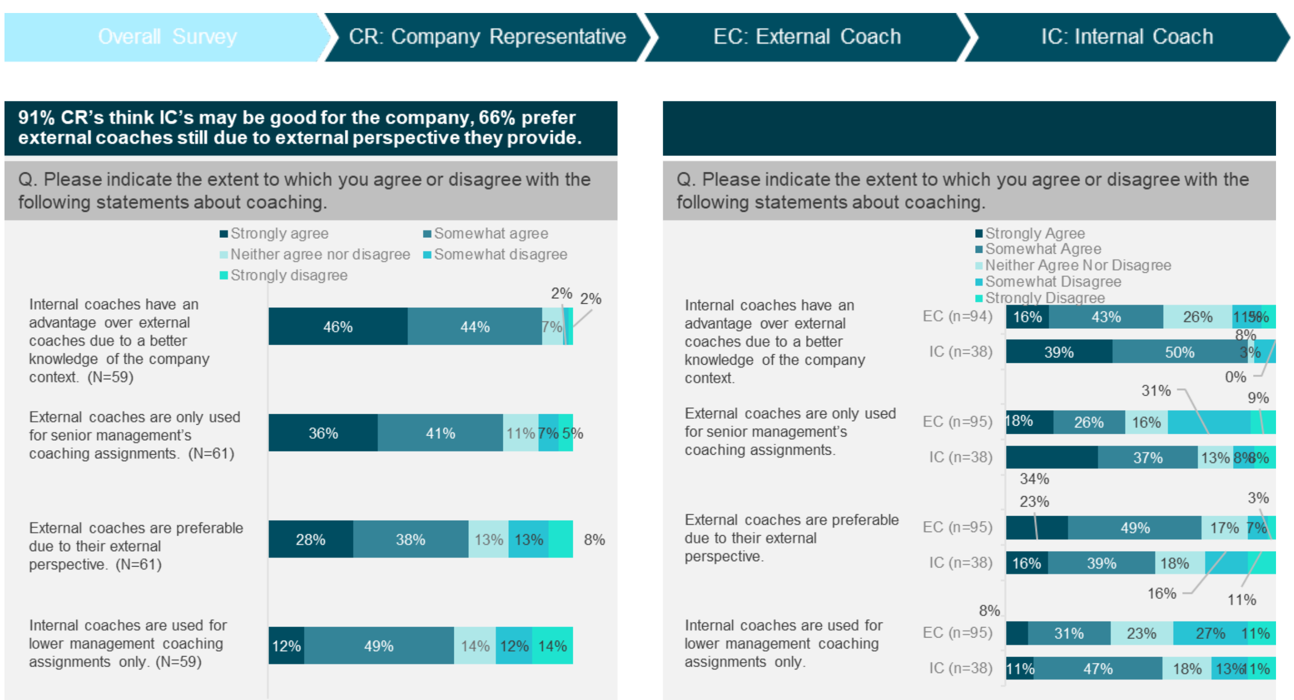
Could this possibly be linked with the inherent cultural values of the region that may be a result of high power distance (Hofstede's cultural dimensions)? How can we honour the unique identity and cultural values and create a unique blend of coaching that is relevant to Asia?

3.4 Beliefs About Internal and External Coaches

90% of CRs, and 89% ICs in **Indonesia** believe that "Internal coaches have an advantage over external coaches due to a better knowledge of the company context", only 16% of the ECs Strongly Agree and 43% somewhat agree.

On the contrary, 72% of ECs believe that "External coaches are preferable due to their external perspective." While only 55% of ICs concur on this statement (only 16% strongly agree) with 66% of CRs (only 28% strongly) agreeing with this.

Interestingly and curiously, there is also variance in the perception that 'ECs are used only for senior managers coaching', CR-77%, EC-44%, IC-71%. Similar variation between CR and EC found for lower management coaching.



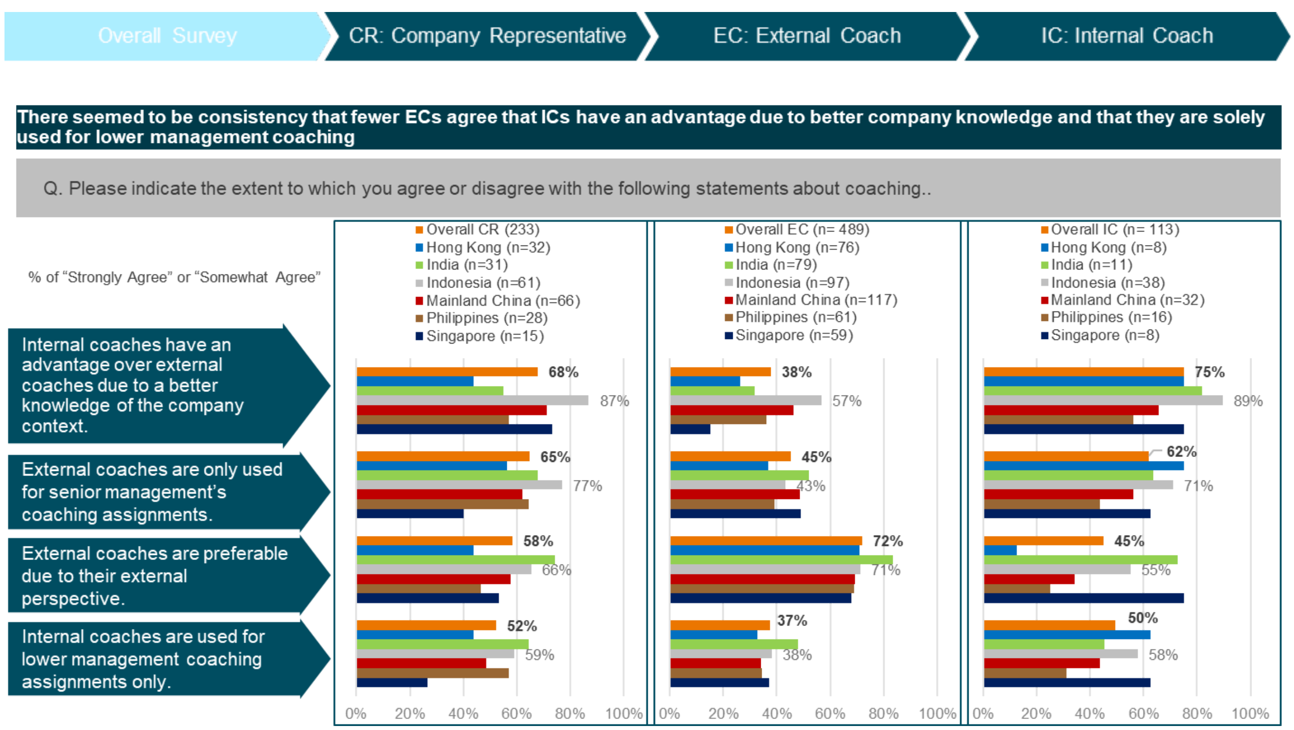
3.5 Beliefs about Internal vs External Coaches – By Market

Marked differences in perceptions & preferences of ECs and ICs and CRs

While 71% of CRs and 76% of ICs believe that 'internal coaches have an advantage over external coaches due to a better knowledge of the company context' only 7% of the ECs 'strongly agree' and 32% 'somewhat agree'.

73% of ECs believe that 'external coaches are preferable due to their external perspective'. Only 46% of ICs (11% strongly agree) and 61% of CRs (19% strongly agree) concur with this statement. Interestingly and curiously, there is also variance in the perception that 'ECs are used only for senior managers coaching', CR-67%, EC-45%, IC-63%. Similar variation between CR and EC found for lower management coaching.

Specially in **Indonesia**, there is also variance in the perception that ECs are used only for senior management coaching' – CR -77%, EC-43%, IC-71%



Something to ponder:

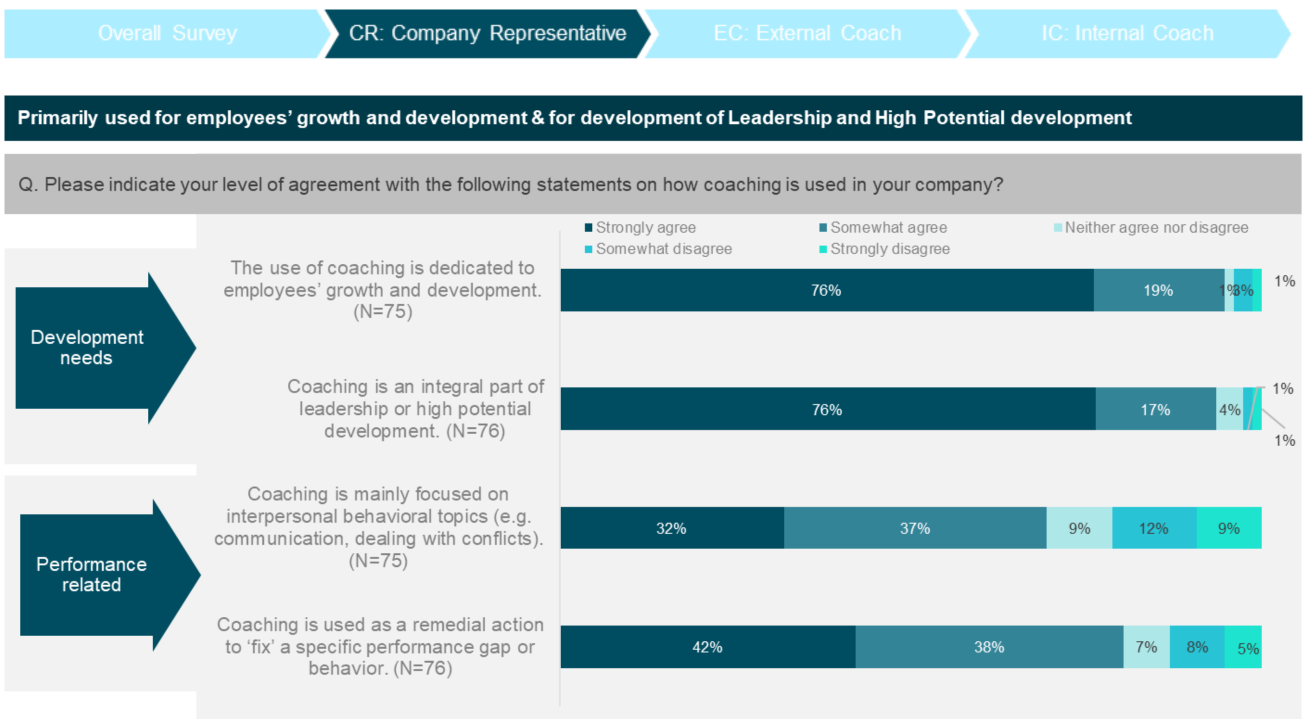
Perhaps the variance in perception is natural and inherent due to the competitive and overlapping nature of their work, is there also a need for realignment in understanding of the market for CRs, ICs and ECs?

3.6 Why Companies Use Coaching

Mostly Company Representative focus on growth and development factor.

Second concern with remedial and last focus on behavioral. More than 90% of coaching is primarily used for employees' growth & high potential development.

Other focus areas are behavioral 69% and remedial 80%

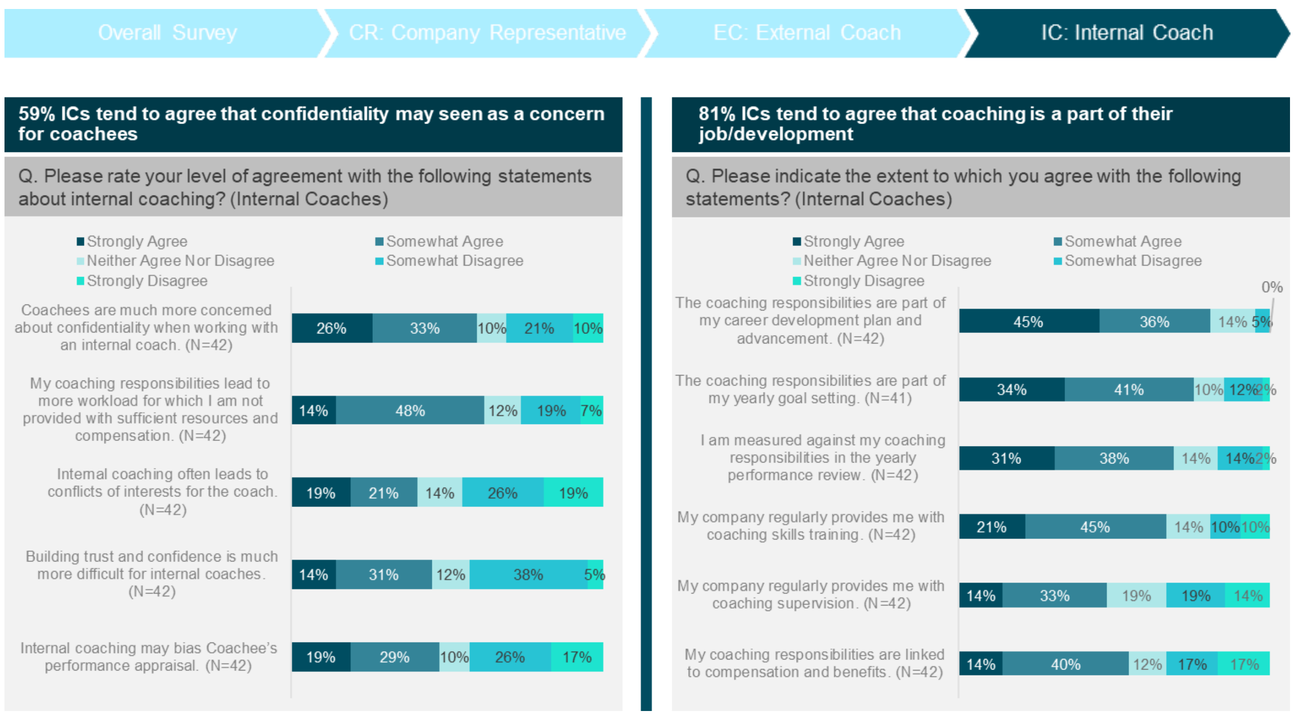


3.7 Opinion of Internal Coaches – Dynamics

While 81% ICs tend to agree that coaching is a part of their job and career development, 62% say that coaching responsibilities lead to more workload and they are not provided with sufficient resources and compensation.

On one hand, 59% ICs tend to agree that confidentiality may seen as a concern for coachees, on the other hand 43% disagree that trust and bias are an issue.

About half disagree that there is any potential conflict of interest (45%) and any bias in coachee's performance appraisal (43%)



Something to ponder:

With internal coaching evolving as a role, what are the potential areas of development for ICs and companies? How to equip IC for their own development and link to companies growth too?

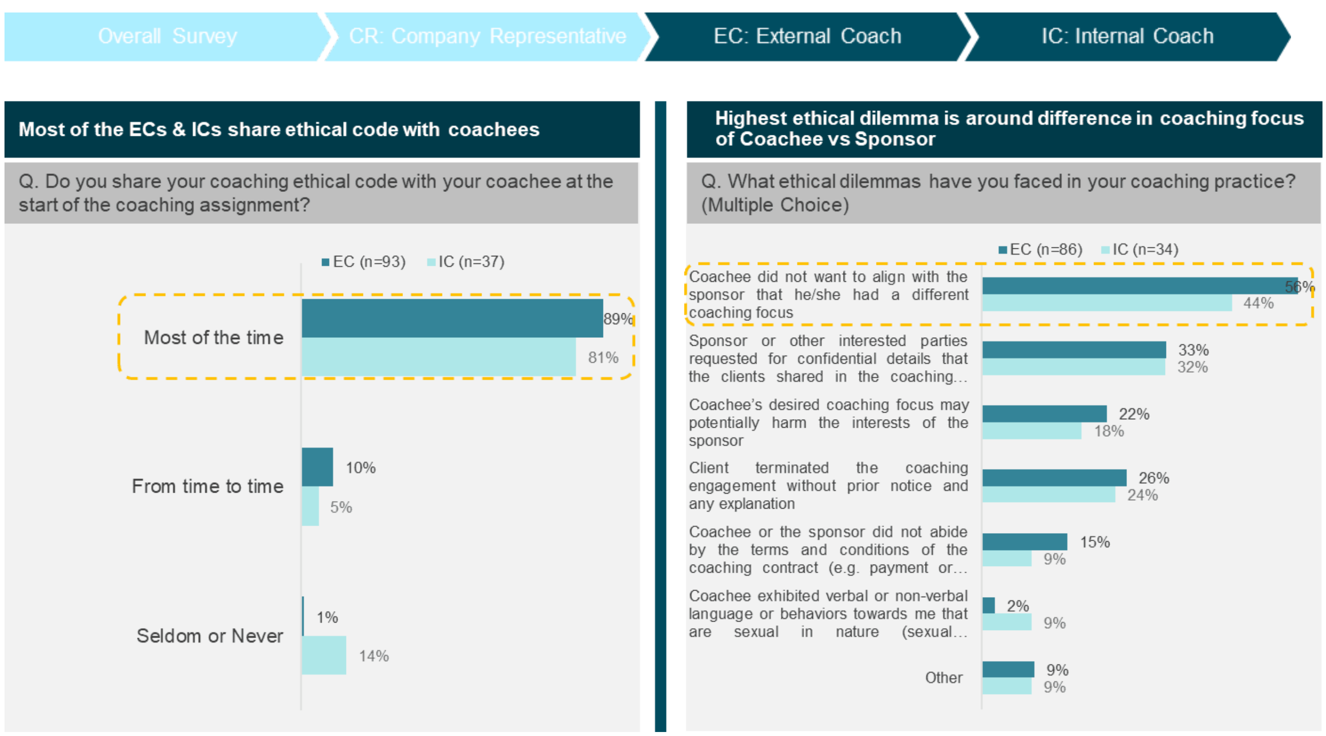
3.8 Ethical Dilemmas Faced While Coaching

Most of the ECs (89%) & ICs (81%) share ethical code with coaches.

Highest ethical dilemma is around difference in coaching focus (56% EC and 44% IC) of Coachee vs Sponsor

33% of ECs and 32% of ICs report having experienced situations around sharing the confidentiality of the coachee's information. More ICs (24%) have faced premature termination of the contract than ECs (26%).

Only 15% ECs and 9% ICs agree that the coachee and the sponsor did not abide by the term and condition of coaching contract. Rarely coachee exhibited verbal or noverbal unproper language, 2% ECs and 9% ICs.



Something to ponder:

Regarding the dilemma 'Coachee wants a different focus from the sponsor' – is this the evolving nature of coaching work or a misalignment between the sponsor and the coachee? How can coaches creatively manage the tripartite relationship with sponsors while serving the needs of their coachee?

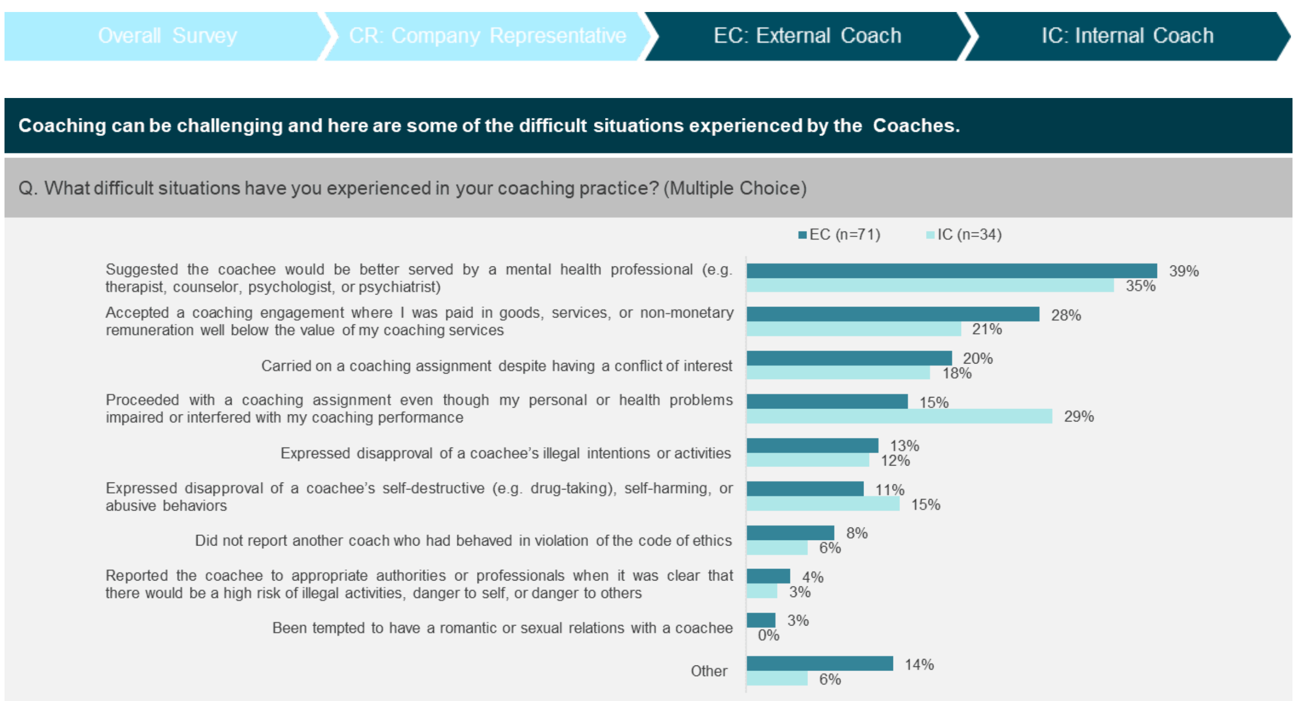
3.9 Difficult Situations Experienced While Coaching

Coaching can be challenging and here are some of the difficult situations experienced by the Coaches.

39%ECs and ICs 35% have recommended a coachee for mental health professional. It is interesting to note that in Indonesia, and 28% EC and 21% IC have accepted coaching engagement with remuneration below the value of coaching service, also 20% EC and 18% IC have carried on a coaching assignment despite having a conflict of interest.

Compare to ECs, ICs reported higher on two difficult situations: proceeding with a coaching assignment despite personal or health problems (IC 29% vs EC 15%) and Expressed disapproval of a coachee's self-destructive (e.g. drug-taking), self-harming, or abusive behaviors (IC 15% vs EC 11%).

Last three difficult situation issues that rarely occurred are denying code ethic violation, danger and ilegal activities, and romantic relation.



Something to ponder:

Does the high percentage referral to mental health professional speak of the rising cases of stress or a lack of awareness of mental health (both coach and coachee)? How equipped are coaches in facing difficult situations like these?

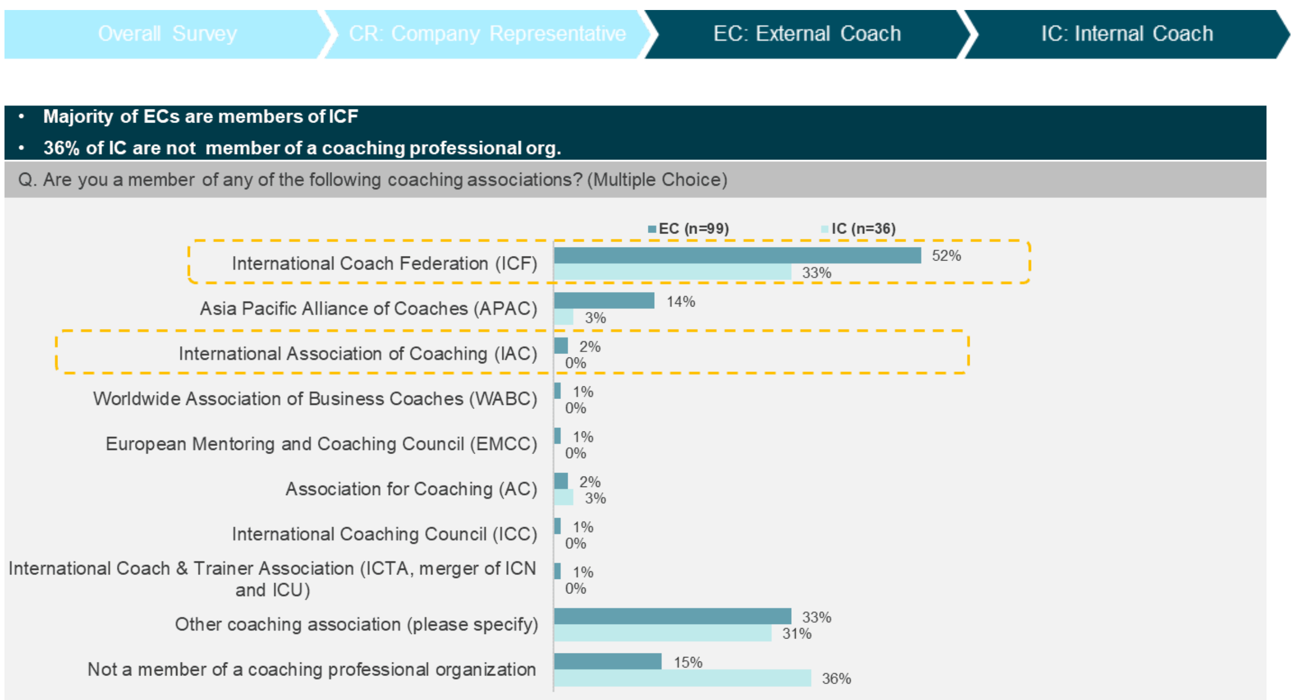
What factors could potentially cause differences in ICs and ECs experience of difficult situations?

5. Coaches' selections and credentials

4.1 Membership of Coaching Association

ICF is the most popular credentialing body

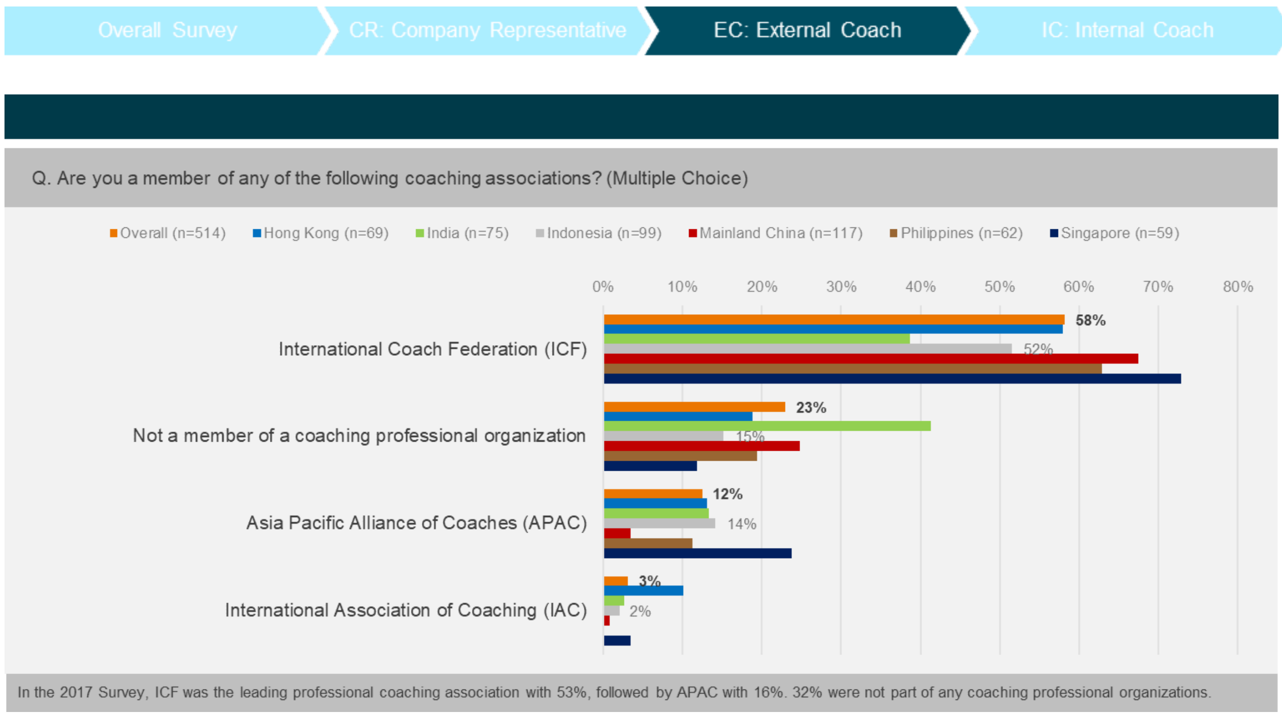
In Indonesia, majority of coaches surveyed have accreditation from ICF with 62% ECs and 33% ICs. Followed by APAC with 14% ECs and 3 % ICs.



4.2 Membership of Coaching Associations – By market

ICF is the still the leading coaching association for coaches in all markets.

Meanwhile APAC is in the second position.



Something to ponder:

Why are ICs staying away from coaching associations? What will attract them to join professional coaching associations?

4.3 Credentialing body

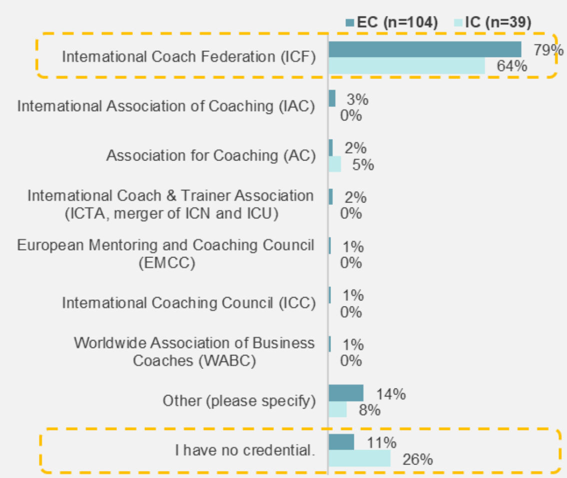
Majority of Coaches have accreditation from ICF

26% of Internal Coaches have no credentials

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

- **Majority of Coaches have accreditation from ICF**
- **26% of Internal Coaches have no credentials**

Q. Who is your credentialing body? (Multiple Choice)



- **Credential Level of EC& IC by Market**

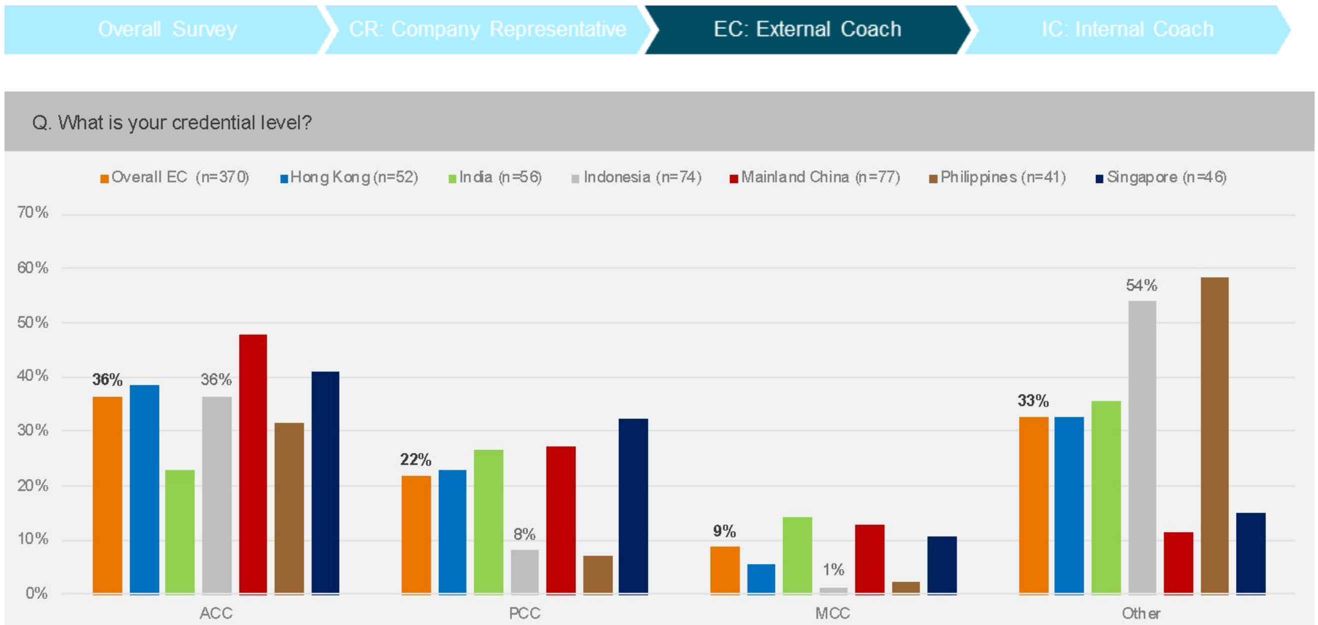
Q. What is your credential level?

EC (number)	ACC	PCC	MCC	Other	Total
Hong Kong	20	12	3	17	52
India	13	15	8	20	56
Indonesia	27	6	1	40	74
Mainland China	37	21	10	9	77
Philippines	13	3	1	24	41
Singapore	19	15	5	7	46
Other	6	9	5	4	24

IC (number)	ACC	PCC	MCC	Other	Total
Hong Kong	2	0	0	2	4
India	0	1	1	1	3
Indonesia	4	0	0	15	19
Mainland China	3	3	0	6	12
Philippines	4	1	0	1	6
Singapore	2	2	0	0	4
Other	0	0	0	2	2

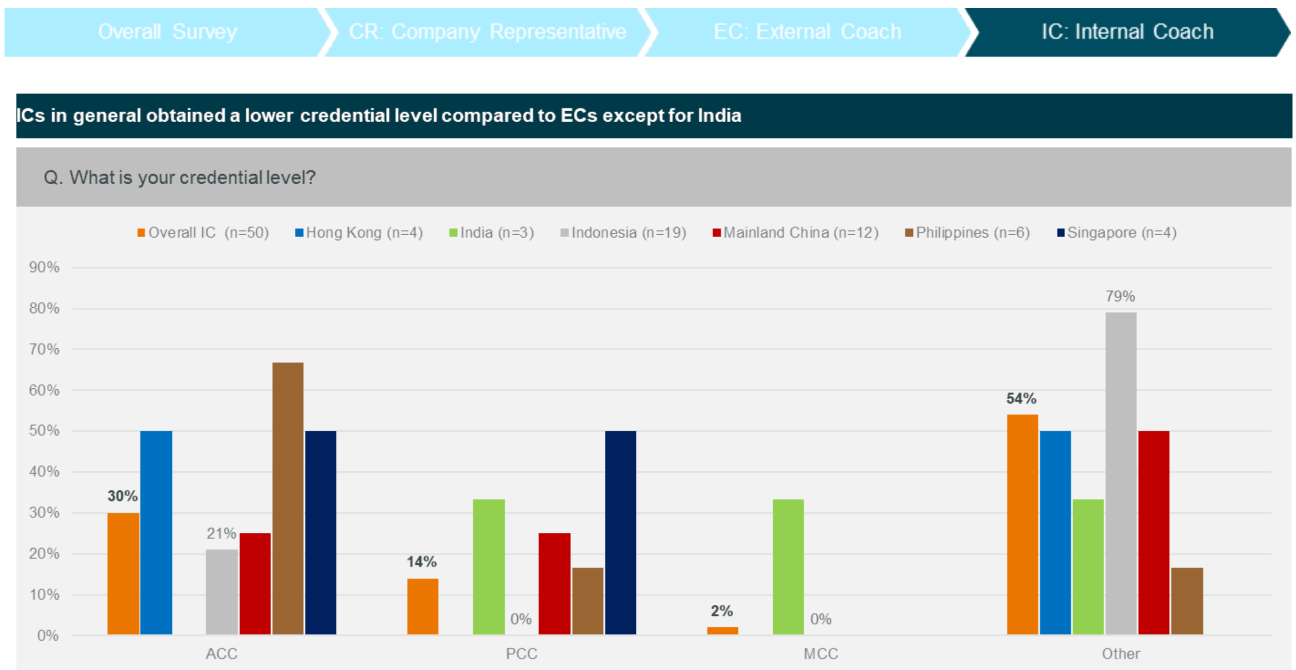
4.4 EC Credential Levels

A fair number of coaches have received non ICF Credentials, majority in the Phillipines and Indonesia.



4.5 IC Credential Levels

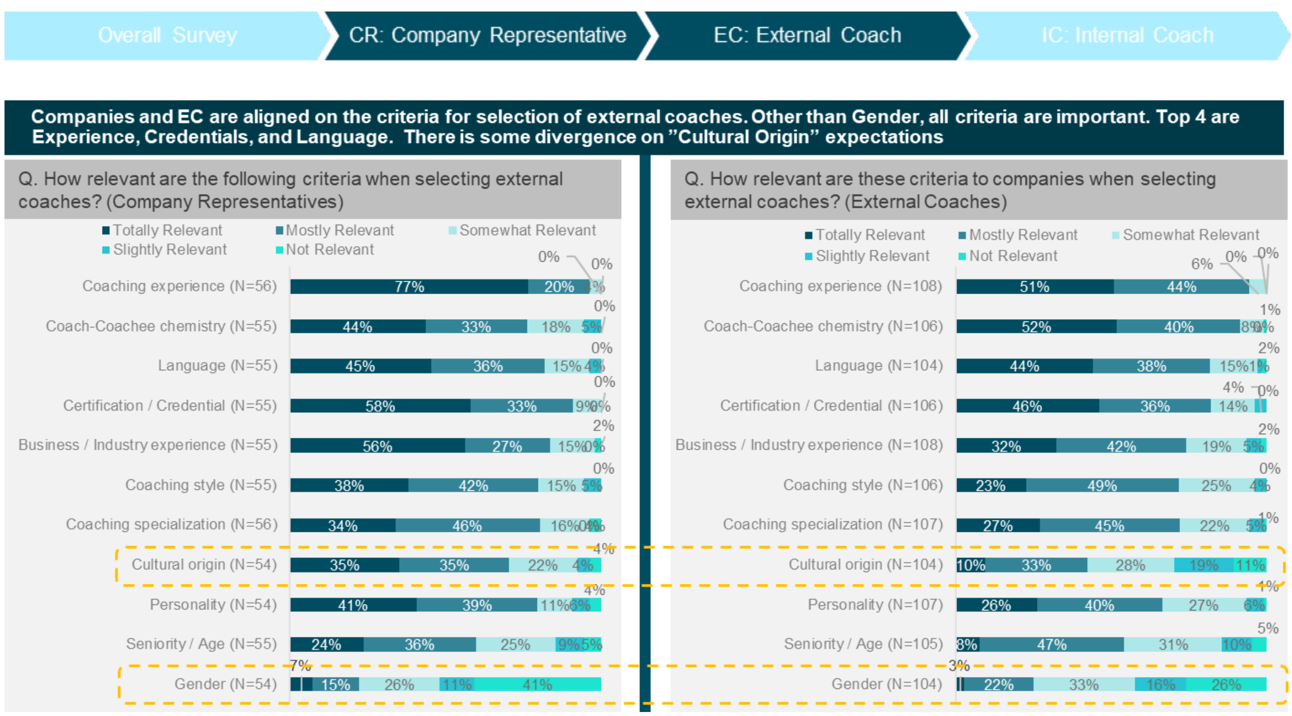
ICs in general obtained a lower credential level compared to ECs except for India.



4.6 Criteria for Hiring & Selecting External Coaches

Companies and ECs are aligned on the criteria for selection of coaches. Top four selection criteria are Coaching Experience, Chemistry, Language and Credentials. Other than Gender, all criteria are seen as important. There is some divergence on ”Cultural Origin” expectations where companies seemed to see it as more relevant than coaches.

In Indonesia, Credentials were seen important by companies (58% and ranking 2) and by ECs (46% and ranking 3).

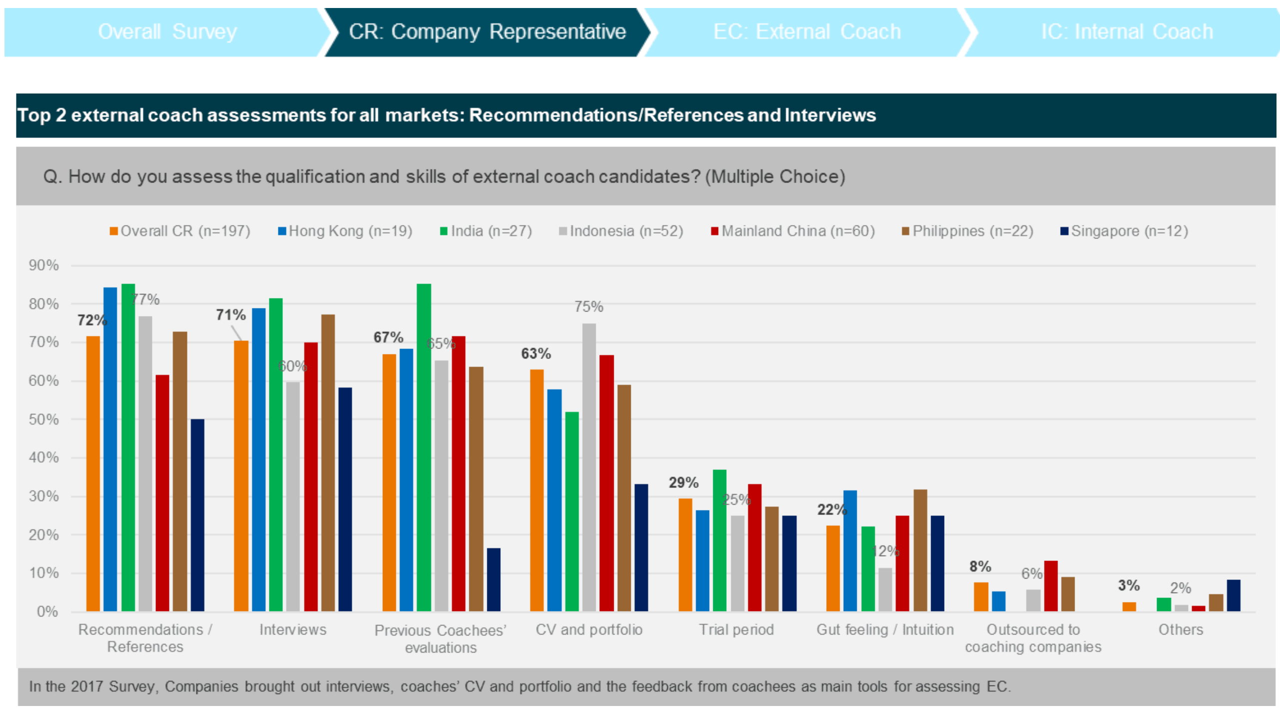


Something to ponder:

Since the no. 1 selection criteria is coaching experience, is it possible that the request of credentials apply more to new entrants than seasoned coaches who have been in the field for a longer time where their coaching experience are seen as more important?

4.7 Assessment of External Coaches

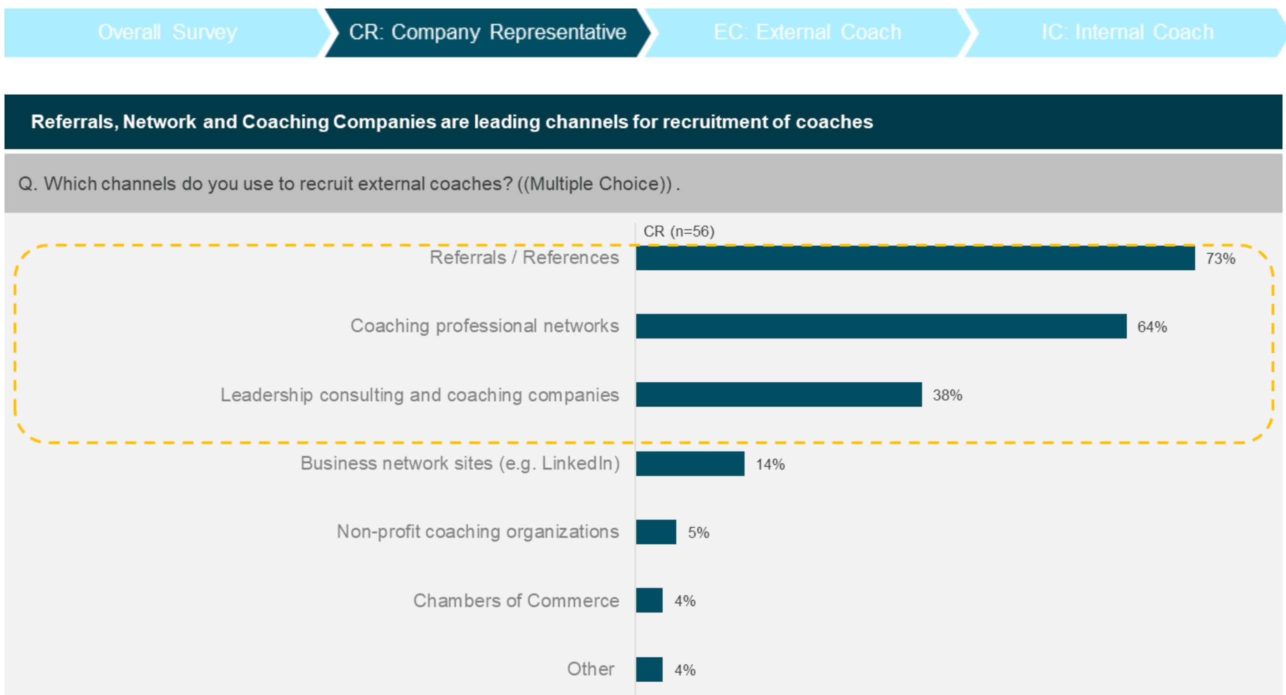
Top 2 external coach assessments for all markets: Recommendations/References and Interviews



4.8 Channels for Hiring External Coaches

Top 3 leading channels for recruitment of coaches are Coaches' Referrals (73%), Coaching professional networks (64%) and Leadership consulting and coaching companies (38%).

Company rarely use business network, non profit coaching organizations and chambers of commerce.

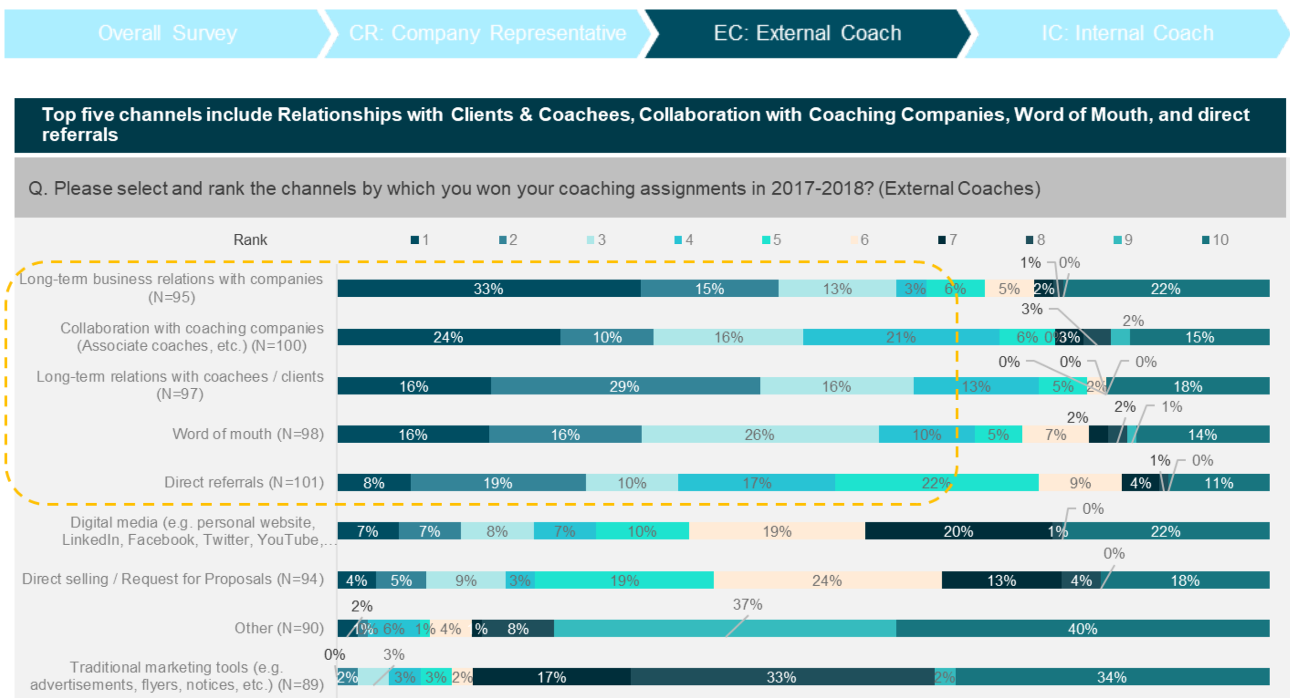


4.9 Channels for Hiring External Coaches

In Indonesia, Top three channels for ECs to win coaching assignments include long term business relations, collaboration with coaching organizations and long term coaching relations

It's interesting and worthwhile to note that ECs use different approaches to be recruited.

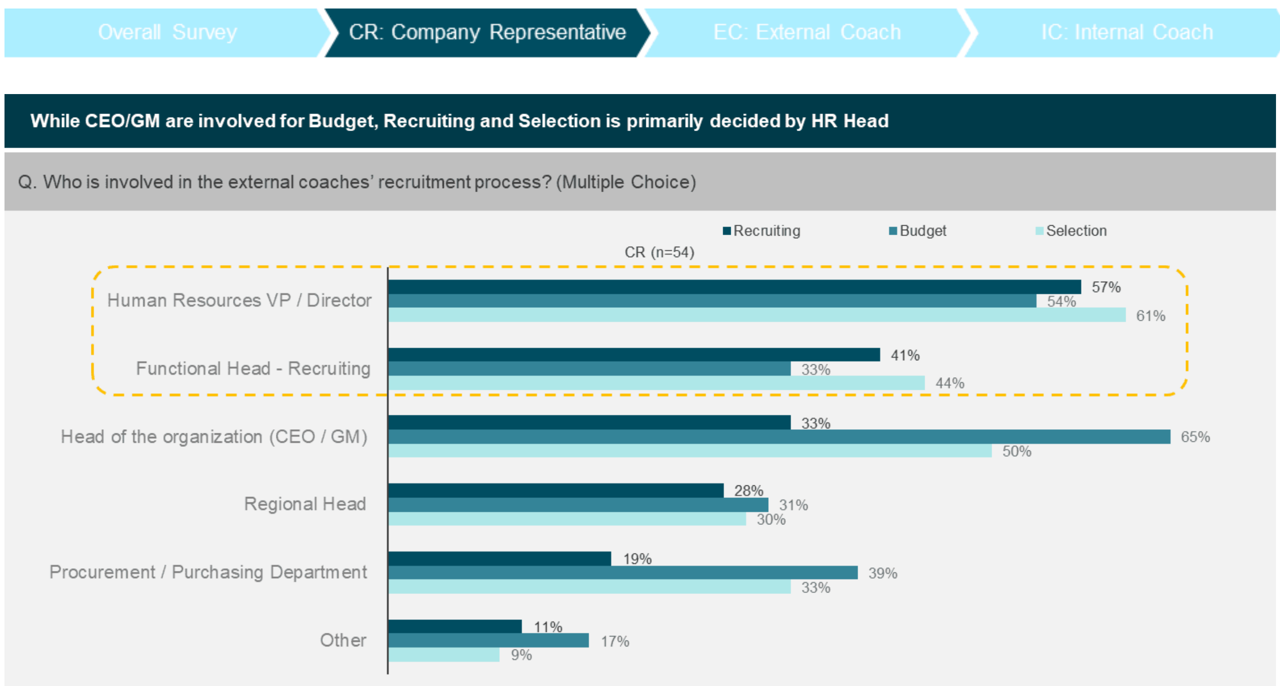
They depend more on relationships rather than direct marketing.



4.10 Decision Makers For Coach Recruitment

Majority of CEO/GMs are involved in budgeting decisions (65%) while HR heads are involved in recruitment (57%) and selection decisions (61%).

In some companies, Functional heads, Regional Heads and Procurement departments are also involved.

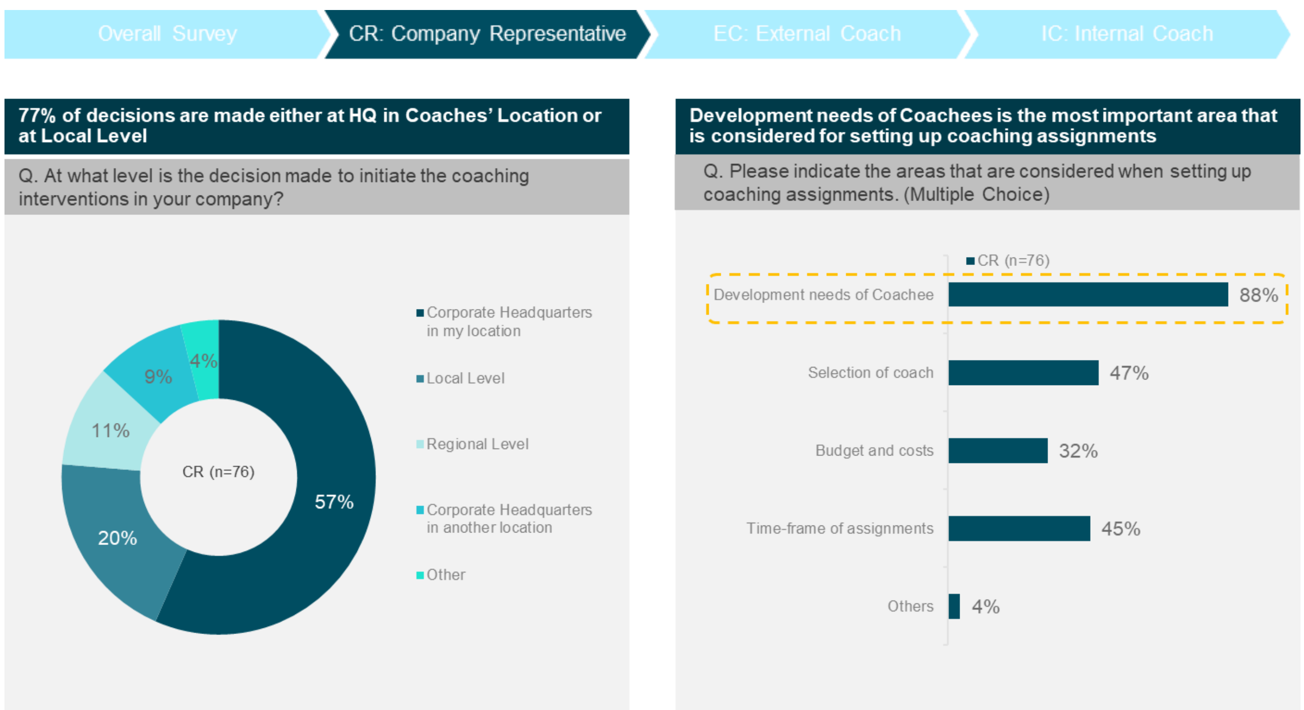


4.11 Setting up Coaching Assignments

Decision to initate coaching interventions mostly made at the Corporate headquarters

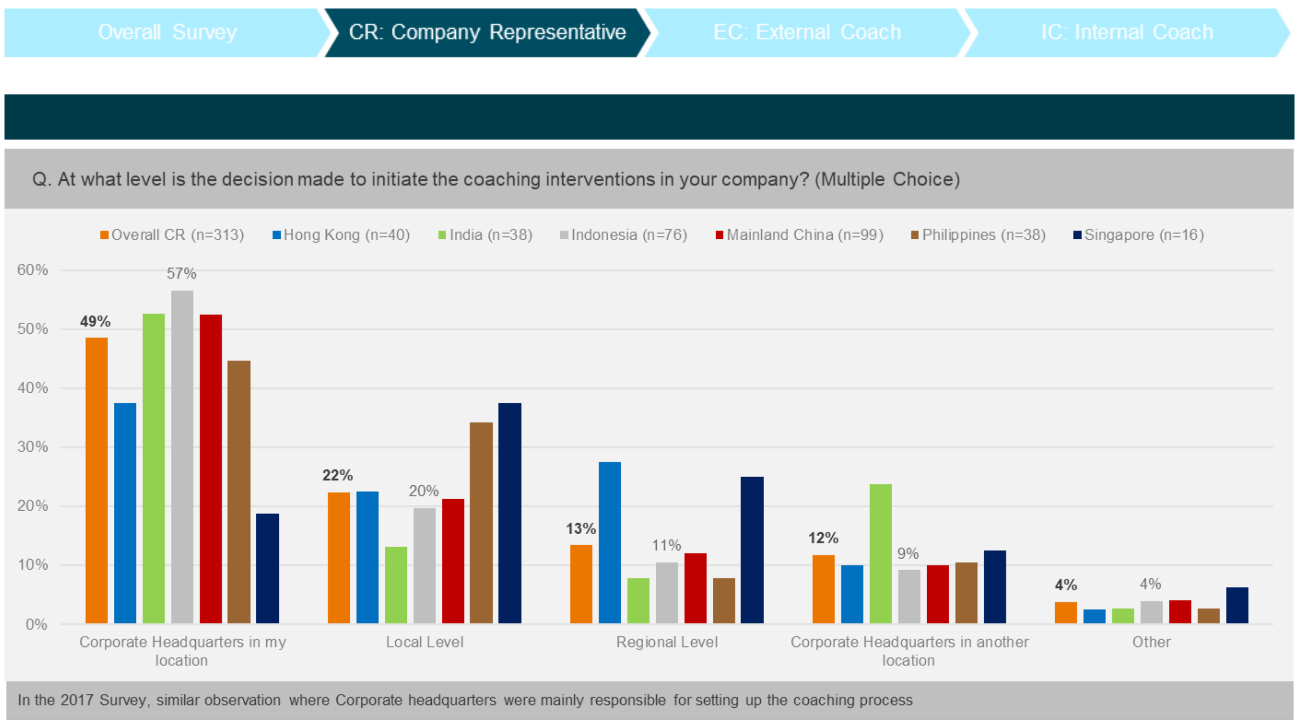
Majority of Companies responded that the decision to initiate the coaching interventions is at the Corporate headquarters (57%) . 20 % responded that the decisions are made at local level and 11% at regional level.

Development needs of coaches is the most important area that is considered for setting up coaching assignments (88%) followed by selection of coach (47%) and Time-frame of assignment (45%)



4.12 Setting Up Coaching Assignments – By Market

Similar results are reported across most markets with the exception of Singapore where decision is primarily made at the local level.



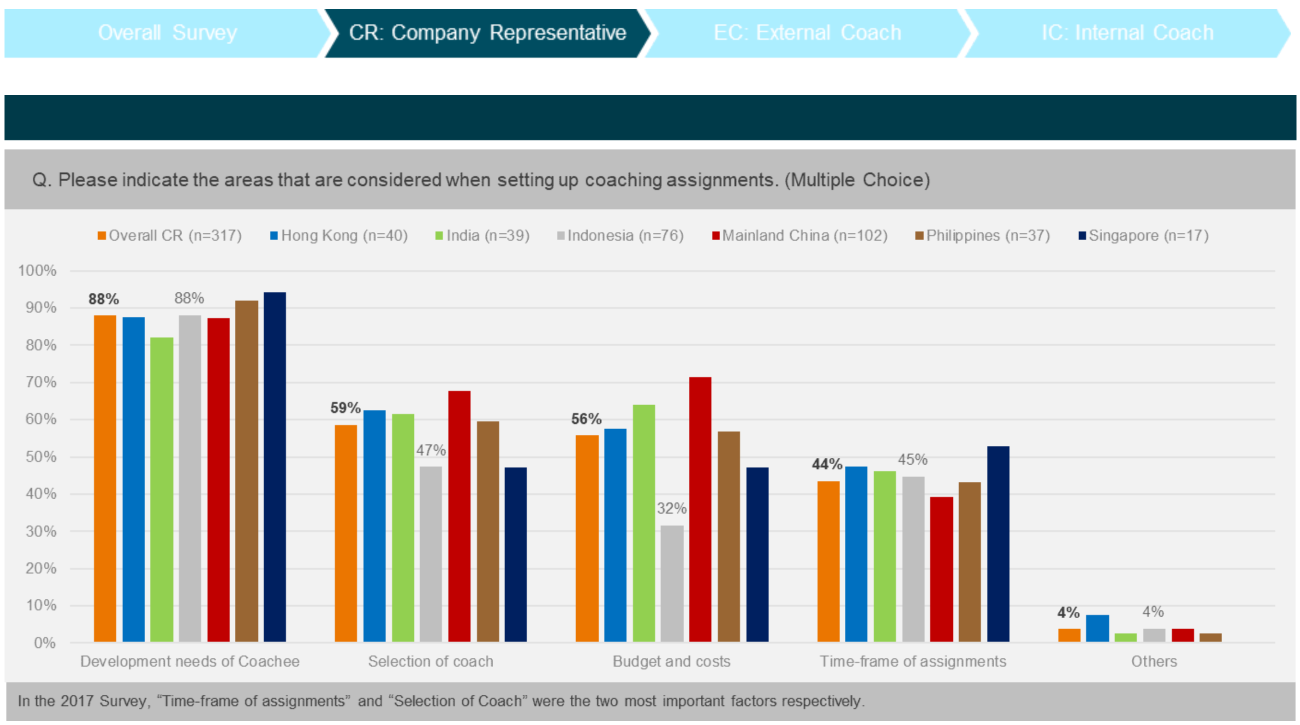
Something to ponder:

Since coaching is mostly initiated at the HQ level, how does it impact the effectiveness of coaching at the local level? How the HQ coaching initiative align with local culture?

4.13 Setting up Coaching Assignments – By Market

As indicated in the graph, development needs of coachees is the most important area that is considered for setting up coaching assignments (88%). Other factors considered include selection of coaches (59%), budget and costs (56%) and time frame of assignments (44%). In the 2017 Survey, “Time-frame of assignments” and “Selection of Coach” were the two most important factors when considering setting up coaching intervention.

Compare to other markets, Indonesia considered Budget and costs for setting up coaching assignment is lower than other markets.



Something to Ponder:

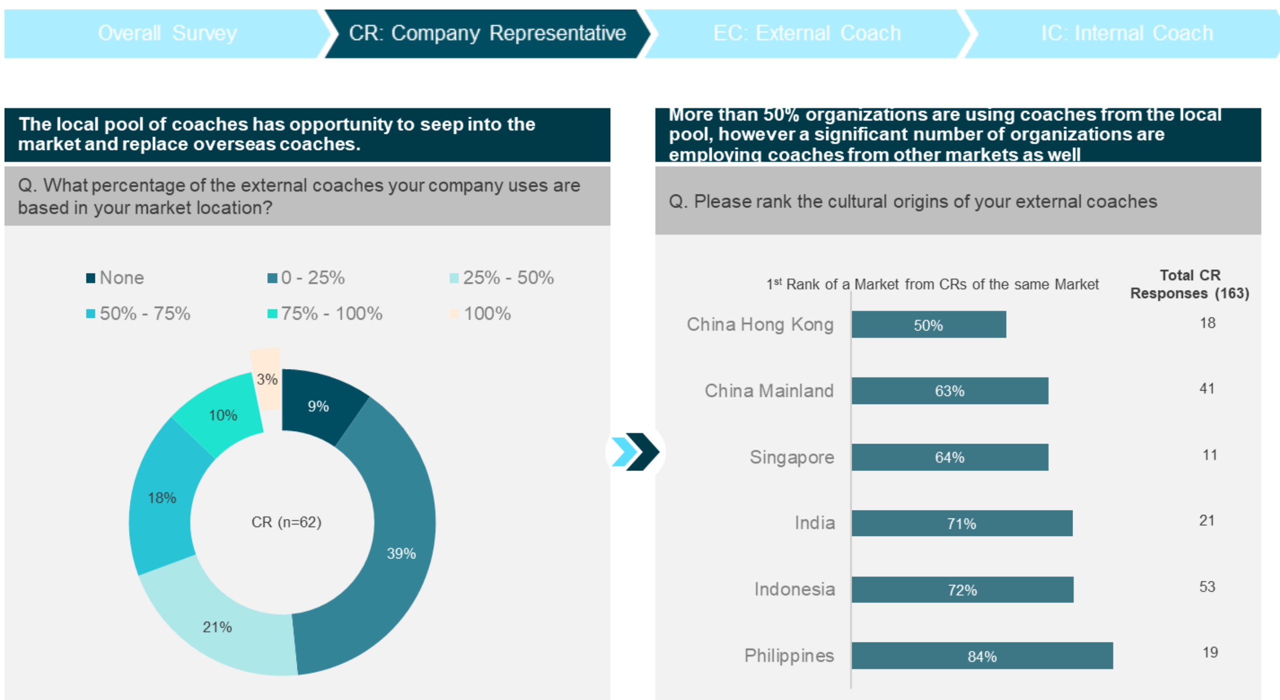
The focus on the development needs of coachee when setting up coaching assignments may be symbolic of a growing awareness of the value of people development.

4.14 Local Pool and Cultural Origin of Coaches

The local pool of coaches has opportunity to seep into the market and replace overseas coaches.

Roughly 2/3 of the companies (69%) are using 50% or less of local coaches.

More than 50% organizations are using coaches from the local pool, however a significant number of organizations are employing coaches from other markets as well.



Something to ponder:

Could overseas coaches be filling in a gap that local coaches could not meet? Or could this be the 'grass is greener on the other side' effect?

4.15 Cultural Origins of ECs

The top ranked cultural origin of the ECs Companies recruited is the same as the market the companies are located.

Other preferred cultural orgins include Europe, US, Singapore and Hong Kong.

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

Organizations prefer coaches from the same cultural origin, followed by Singapore, US and Europe

Q. Please select the top three cultural origins of your external coaches.

Origin of Organizations

Row Labels	Hong Kong	India	Indon-esia	Main-land China	Philipp-ines	Singap-ore	Other Asian Markets	Africa	Americas — Central or South America	USA / Canada	Australia / New Zealand	Europe	Middle East
Hong Kong (n=23)	87%	9%	0%	22%	0%	35%	13%	4%	0%	17%	13%	35%	0%
India (n=29)	3%	90%	0%	0%	0%	10%	10%	3%	10%	21%	0%	7%	0%
Indonesia (n=71)	0%	3%	86%	3%	3%	31%	10%	0%	3%	8%	10%	13%	1%
Mainland China (n=65)	38%	3%	0%	92%	0%	20%	5%	0%	0%	17%	8%	20%	0%
Philippines (n=28)	4%	7%	0%	0%	82%	7%	4%	0%	0%	14%	7%	14%	0%
Singapore (n=12)	8%	33%	0%	8%	0%	75%	8%	0%	0%	17%	0%	50%	8%

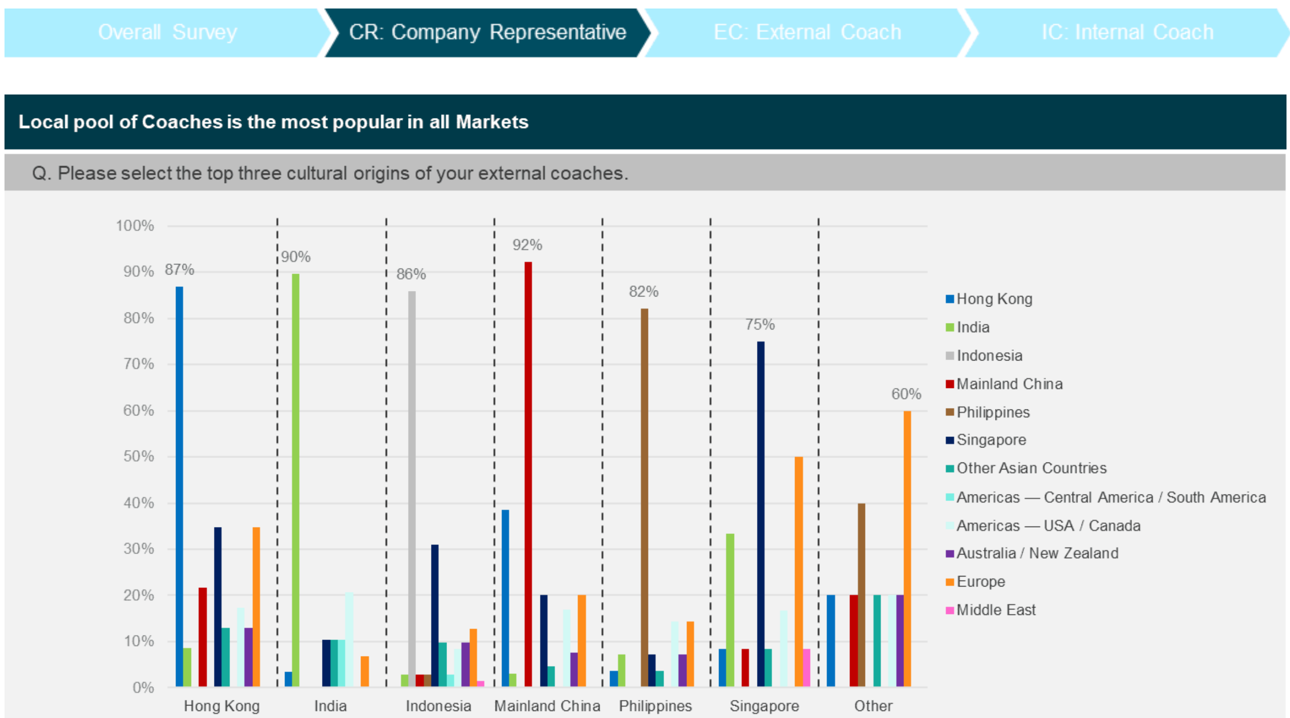
2nd Highest selection

3rd Highest selection

4.16 Cultural Origins of ECs

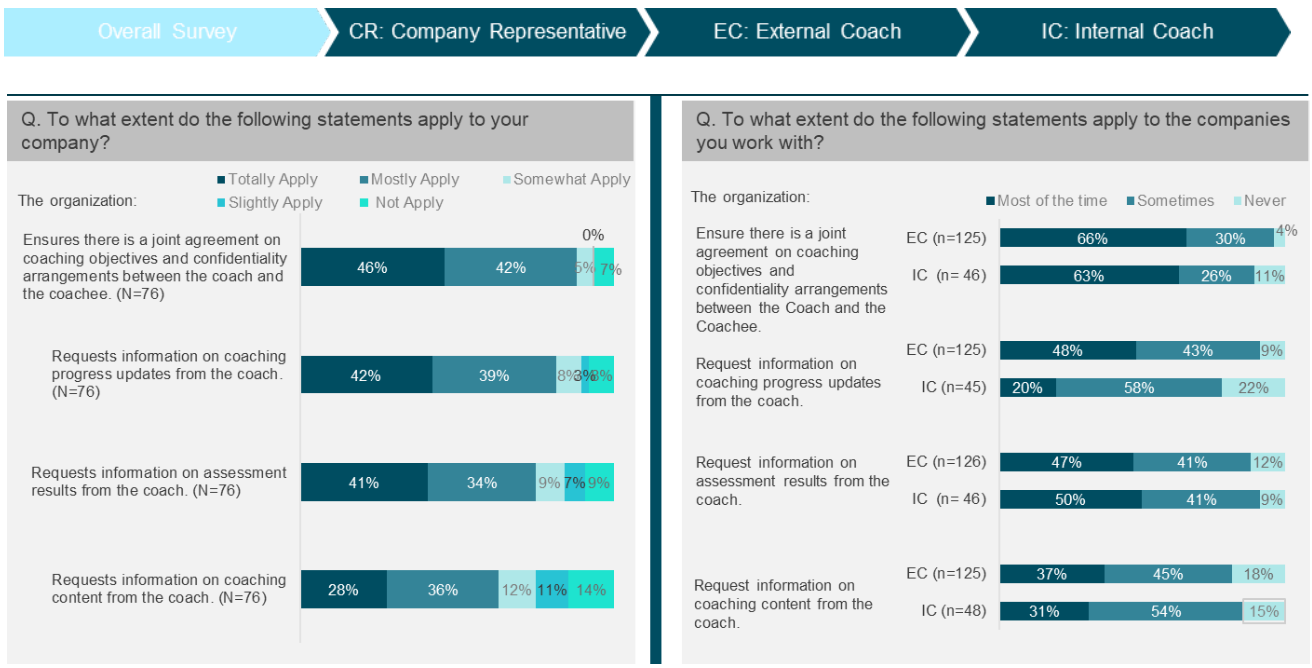
Local pool of coaches is the most popular in all market.

Companies in Indonesia choose local pool of coaches 86%, followed by coaches from Singapore, Europe, other Asian countries and Australia/NZ.



4.17 Coaching Process Setup

Companies say they remain more involved and it is allign with the experience of EC and IC, eventhough there is divergence in ICs on coaching progress update from the coach.



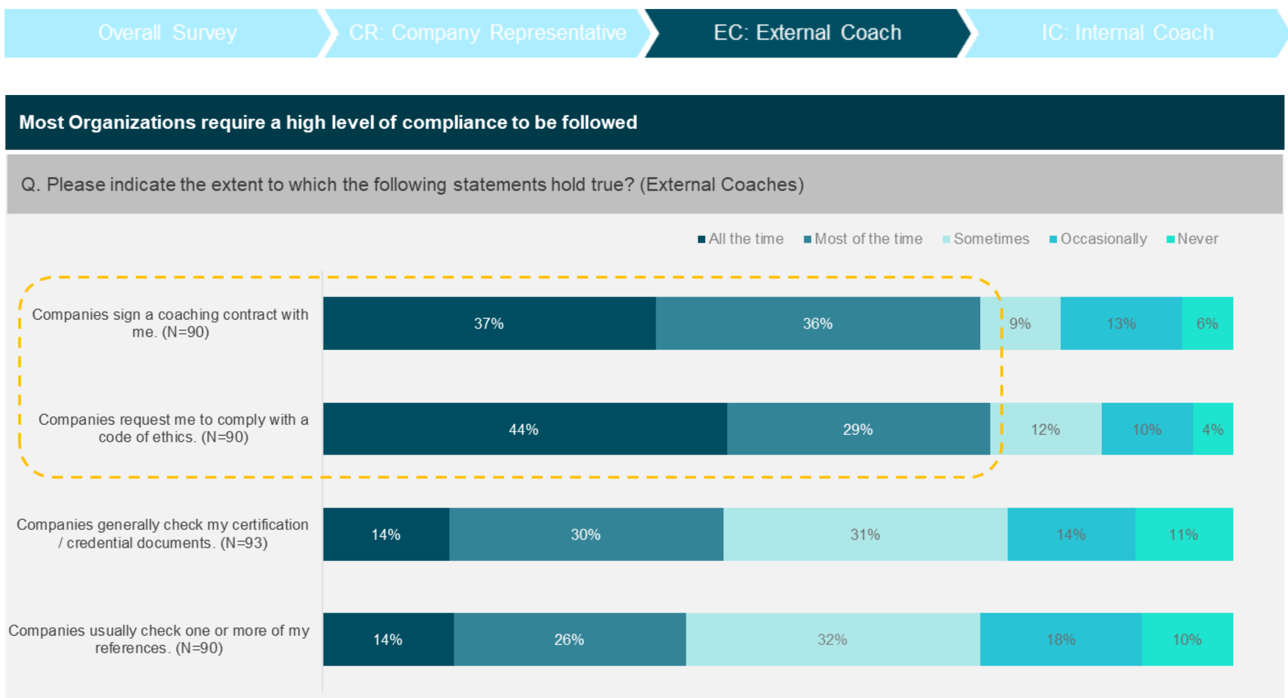
Something to ponder:

How Coaches and Companies can manage their involvement for coaching process?

4.18 Process Compliance by Organizations

Most organizations require a high level of compliance to be followed .

According to coaches, majority of companies comply with signing of coaching contracts and requesting ethics compliance, while they seem to be paying less attention on checking coaches' credentials and references.

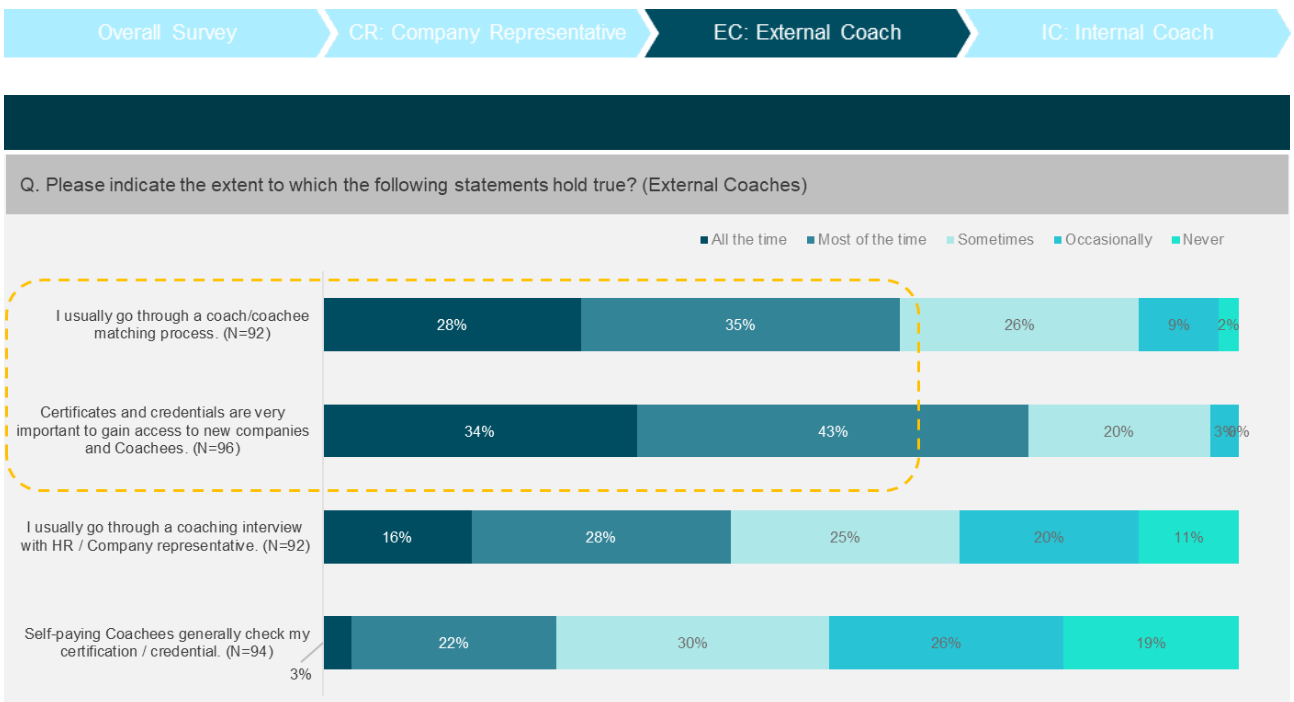


4.19 Coaching Process Practices

Credentials seemed to be important for new companies and coachees but not to self paying coachees.

Majority of coaches claimed that expressed that certificates and credentials are very important to gain access to new companies and coachees and they would usually go through a coach/coachee matching process .

Self paying coachees seem to care less about checking on credentials and certification of coaches.



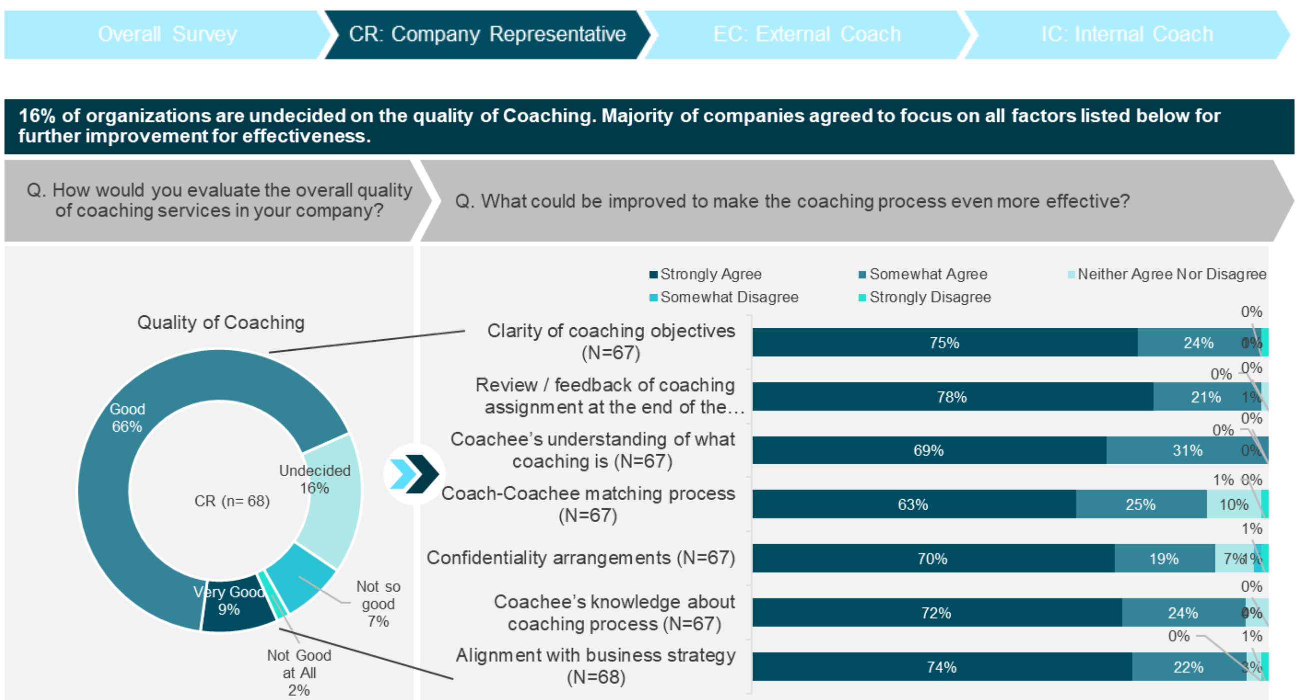
6. Coaching evaluation and diagnosis

5.1 Evaluation of Coaching Quality

Overall perceived quality of coaching services received by companies in Indonesia rated ‘Very good’ is 9% and ‘Good’ is 66%, ‘Undecided’ is 16 % while ‘Not so good’ and ‘Not very good’ is around 9 %.

What could be improved to make the coaching process even more effective?

Majority of companies agreed to focus on clarity of coaching objectives (99%), review/feedback of coaching assignment at the end of the session (99%), Coachee’s understanding of what coaching is (100%), Coach-Coachee matching process (88%), Confidentiality arrangements (89%), coachee’s knowledge about coaching process (96%) and alignment with business strategy (96%)

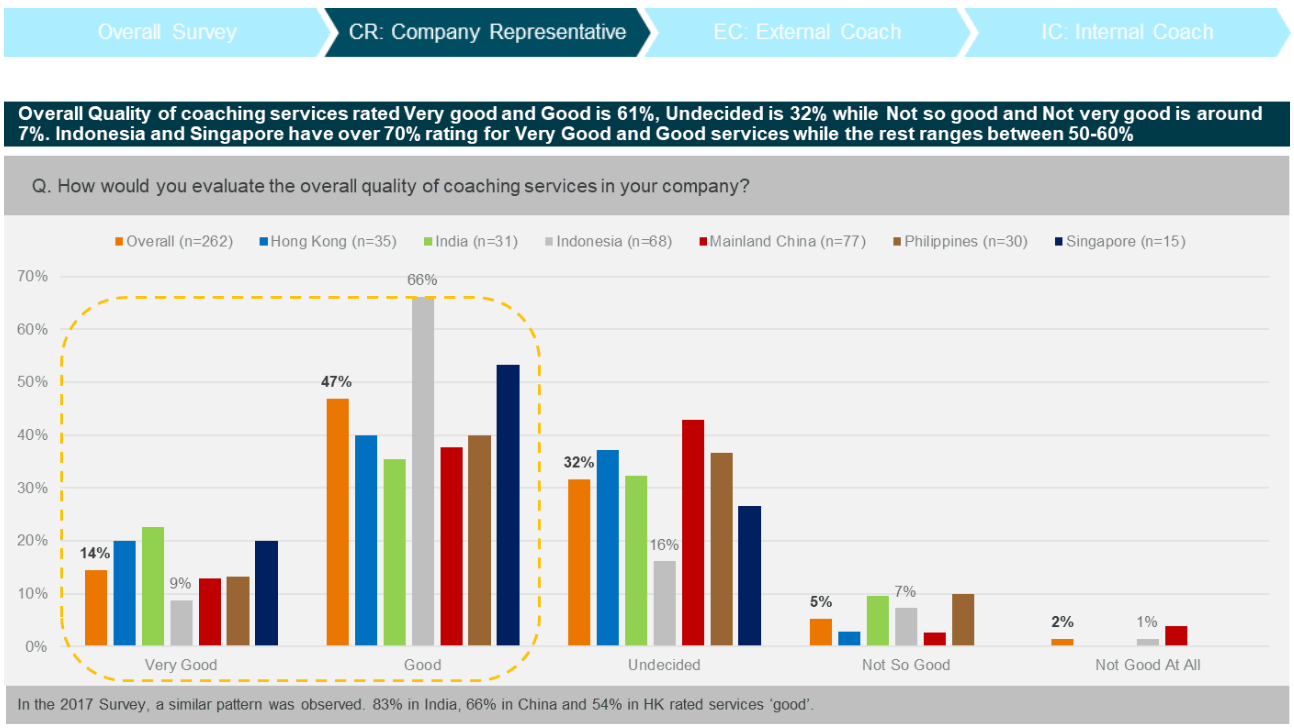


Something to ponder:

How can the suggested improvements create a shift in the perceived quality of coaching, level of client satisfaction and raise the impact of coaching?

5.2 Evaluation of Coaching Quality

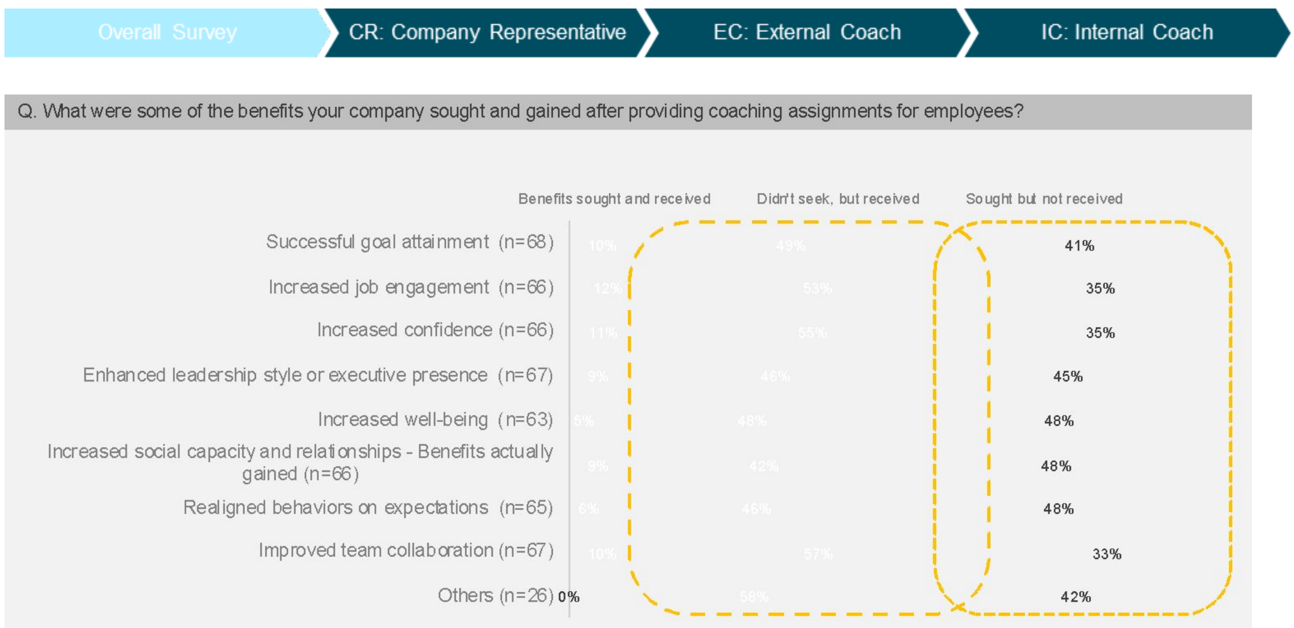
When we look at the market data, Indonesia and Singapore have over 70% rated 'Very Good' and 'Good' services while the rest of the markets range between 50-60%.



5.3 Coaching Benefits – Expectations vs Delivery

On average, about 42% of companies have not received benefits sought. Another 50% received benefits they didn't seek while only roughly 8 % actually received the coaching benefits they sought.

Could this be the clue of earlier 16 % 'Undecided' ratings companies gave for coaching quality



Something to ponder:

What could be leading to the discrepancy of benefits sought and received? How do we close this gap and increase the perceived quality of coaching services?

To answer this, we may need to understand the level of clarity on the benefits of coaching for both companies & coaches, adequacy of articulation and communication of coaching benefits during contracting as well as throughout the coaching process.

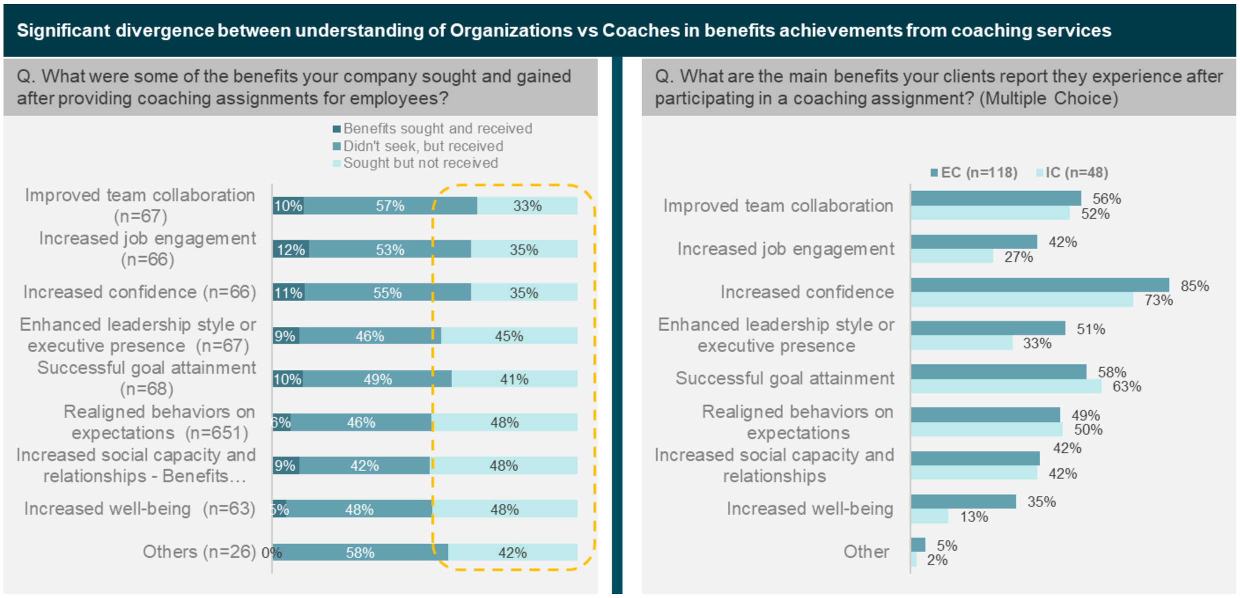
5.4 Coaching Benefits – Expectations vs Delivery

Companies and Coaches have significant divergence in their understanding of benefits expectations and delivery from the coaching services.

On average, about 50% of companies have not received benefits sought. Another 42% received benefits they didn't seek while only roughly 8 % actually received the coaching benefits they sought.

While the main benefits of Internal and external coaches' clients report they experience after participating in a coaching assignment are Increased confidence (EC : 85 %, IC : 73%), Successful goal attainment (EC:58% , IC : 63%), Improved team collaboration (EC:56%,IC:52%), Realigned behaviours on expectation (EC: 49%, IC:50%), Increased social capacity and relationship (EC:42%, IC:42%), Enhanced leadership style or executive presence (EC:51%, IC: 33%) and Increased job engagement (EC:42%,IC: 27%)

We may need to find out the level of understanding on the benefits of coaching for both companies and coaches as well as the adequacy of articulation and communication of coaching benefits during contracting as well as throughout the coaching.

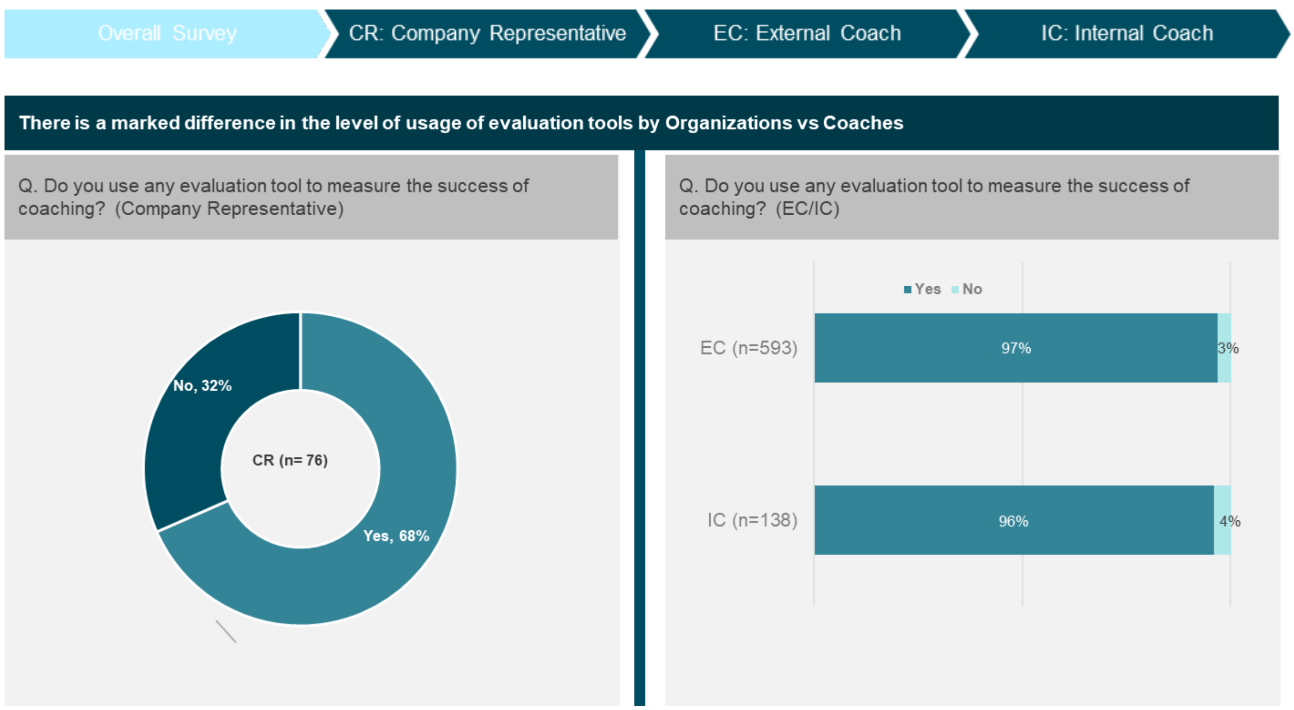

Significant divergence between understanding of Organizations vs Coaches in benefits achievements from coaching services
Q. What were some of the benefits your company sought and gained after providing coaching assignments for employees?
Benefits sought and received
Didn't seek, but received
Sought but not received
Improved team collaboration (n=67) 10% 57% 33%
Increased job engagement (n=66) 12% 53% 35%
Increased confidence (n=66) 11% 55% 35%
Enhanced leadership style or executive presence (n=67) 9% 46% 45%
Successful goal attainment (n=68) 10% 49% 41%
Realigned behaviors on expectations (n=651) 6% 46% 48%
Increased social capacity and relationships - Benefits… 9% 42% 48%
Increased well-being (n=63) 5% 48% 48%
Others (n=26) 0% 58% 42%
Q. What are the main benefits your clients report they experience after participating in a coaching assignment? (Multiple Choice)
EC (n=118)
IC (n=48)
Improved team collaboration 56% 52%
Increased job engagement 42% 27%
Increased confidence 85% 73%
Enhanced leadership style or executive presence 51% 33%
Successful goal attainment 58% 63%
Realigned behaviors on expectations 49% 50%
Increased social capacity and relationships 42% 42%
Increased well-being 35% 13%
Other 5% 2%

5.5 Usage of tool to measure success of coaching

Marked difference in the level of usage of evaluation tools by Companies vs Coaches.

68 % company use evaluation tool to measure the success of coaching, while 97 % External coach and 96% Internal coach use evaluation tool.

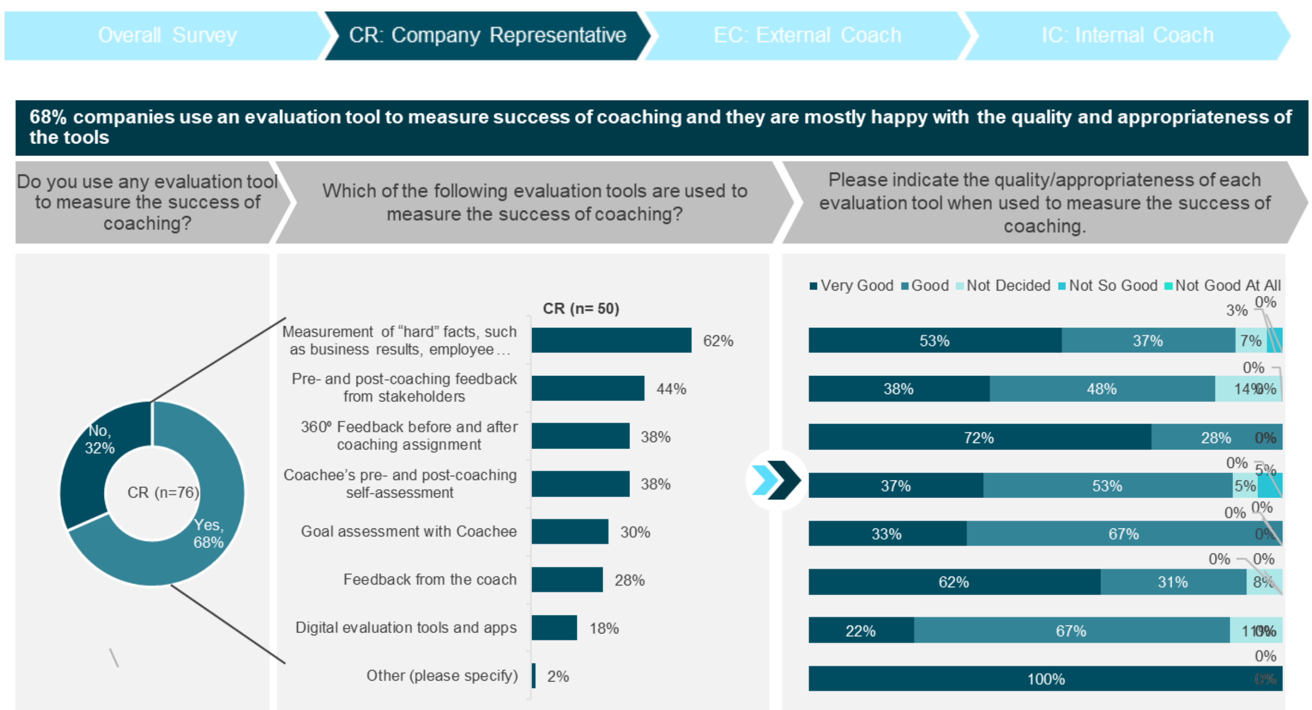
Coaches may need to discuss with organization about measurement of coaching success prior to coaching program and coaches need to share the result of coaching program with the organization.



5.6 Measurement of Coaching Success

68% companies use an evaluation tool to measure success of coaching and they are mostly happy with the quality and appropriateness of the tools

Companies who use evaluation tools value hard facts (62%) followed by Pre and post coaching feedback from stakeholder (44%), 360 feedback (38%), coachee's self assessment (38%), goal assessment with coachee (30%), feedback from the coach (28%) and only 18% indicated that they would use digital evaluation tools and apps.



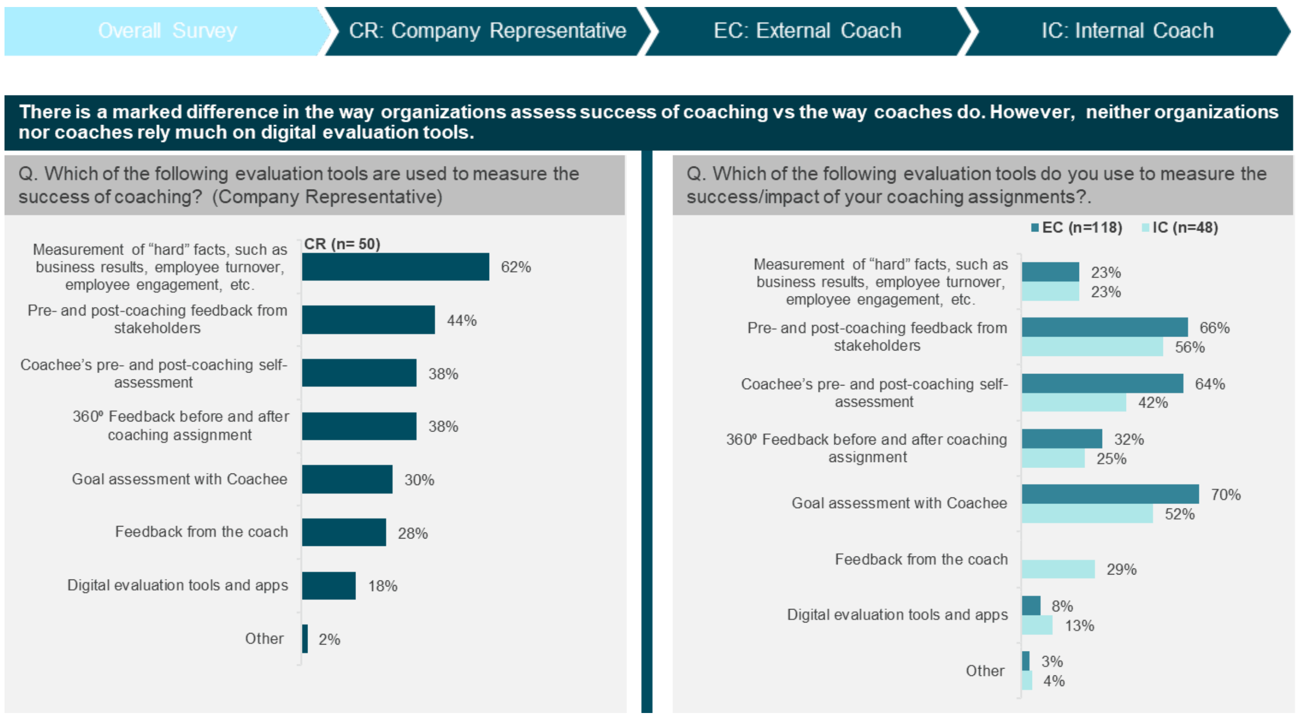
5.7 Measurement of Coaching Success

There is a marked difference in the way organizations assess success of coaching vs the way coaches do. However, neither organizations nor coaches rely much on digital evaluation tools.

Companies who use evaluation tools value hard facts(62%) followed by Pre and post coaching feedback from stakeholder (44%), 360 feedback (38%), coachee's self assessment (38%), goal assessment with coachee (30%), feedback from the coach (28%) and only 18% indicated that they would use digital evaluation tools and apps.

While coaches tend to focus on soft data such as pre and post coaching feedback from stake holder (EC:66%, IC: 56%), Coachee's self assessment (EC:64%,IC:42%), Goal assessment with coachee (EC:70%,IC:52%), 360 feedback (EC:32%,IC:25%), Feedback from the coach (IC:29%), and digital evaluation tools and apps (EC:8%, IC: 13%)

Coaches may need to relate coaching measurement with measurement of hard facts such as business result, employee turnover, employee engagement, etc. And discuss with companies how the coaching measurement can support them in seeing their organization development or growth.

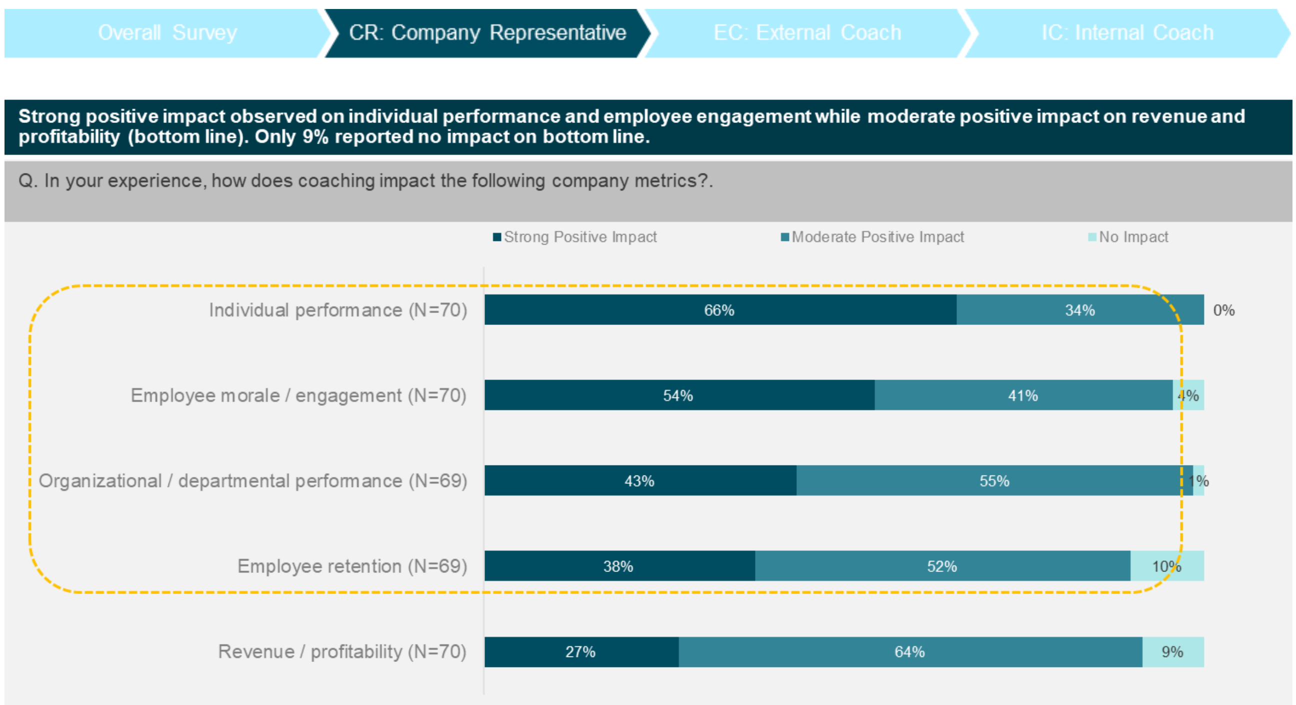


Something to Ponder:

What do coaches need to focus on measuring to make coaching benefits more known to companies? How do we link what we measure to business results or 'hard' facts, to make it meaningful and relevant to Companies? How coaches align their measurement with companies' expectation?

5.8 Coaching Impact

Strong positive impact observed on individual performance (66%) and employee engagement (54%) while moderate positive impact on revenue and profitability (bottom line) (64%). Organizational performance (55%), Employee retention (52%) Only 9% reported no impact on bottom line, 10 % on employee retention, 1% on organizational performance, 4% on employee engagement.



Something to ponder :

How can Coaches ensure coaching impact align with companies expectation?

7. Coaches Professional Development

6.1 Professional Development of coaches - Practices and Time spent

23 % EC spend 60 hours or more on continuous professional development while IC only 8%. 26% of EC and 19% of IC spend 21- 40 hours . Most number of ICs (43%) say they spend 6 to 20 hours per annum on personal development.

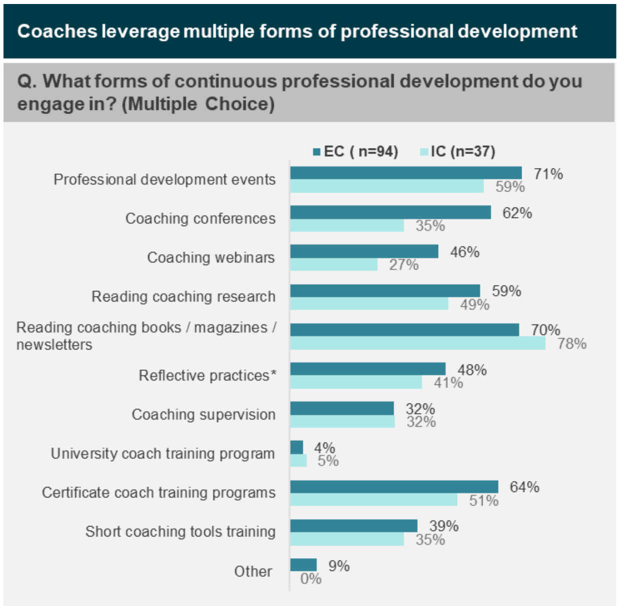
While all coaches are leveraging multiple forms of professional development, ECs are more invested in professional development.

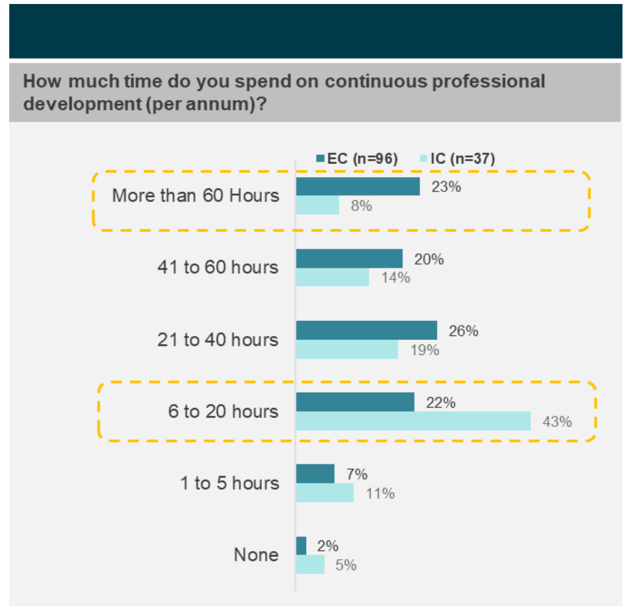
Attending professional development events (EC: 71%, IC: 59%), reading coaching books, magazines (EC: 70%,IC:78%), reading coaching research (EC: 59% IC:49%),Certificate coach training (EC:64%,IC:51%) and attending coaching conferences (EC: 62%, IC:35%) are some of the top rated professional development activities.

ECs (48%) and ICs (41%) are using Reflective practices for professional development

Coaching webinars are more popular with ECs (46%) than ICs (27%). Coaching supervision, although a new area, 32% ECs and 32% ICs say they engage in it

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach





6.2 Training & Education of Coaches

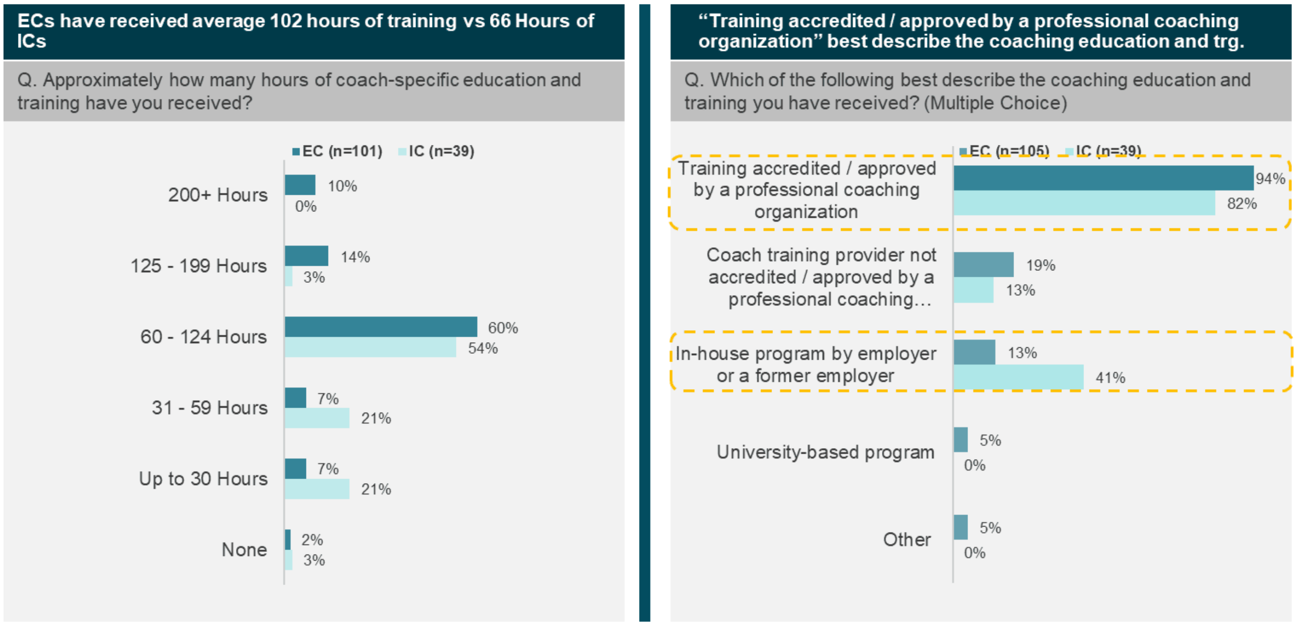
On an average ECs receive 102 hours of coach specific education and training while ICs receive 66 hours

Majority of EC (60%) and IC (54%) receive 60 - 124 hours of coach specific education and training.

Majority of coaches (94% ECs and 82% ICs) say they have received training from accredited or approved professional coaching organization.

41% ICs say they received the coach-specific training as part of in-house program by employer

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach



Something to ponder:

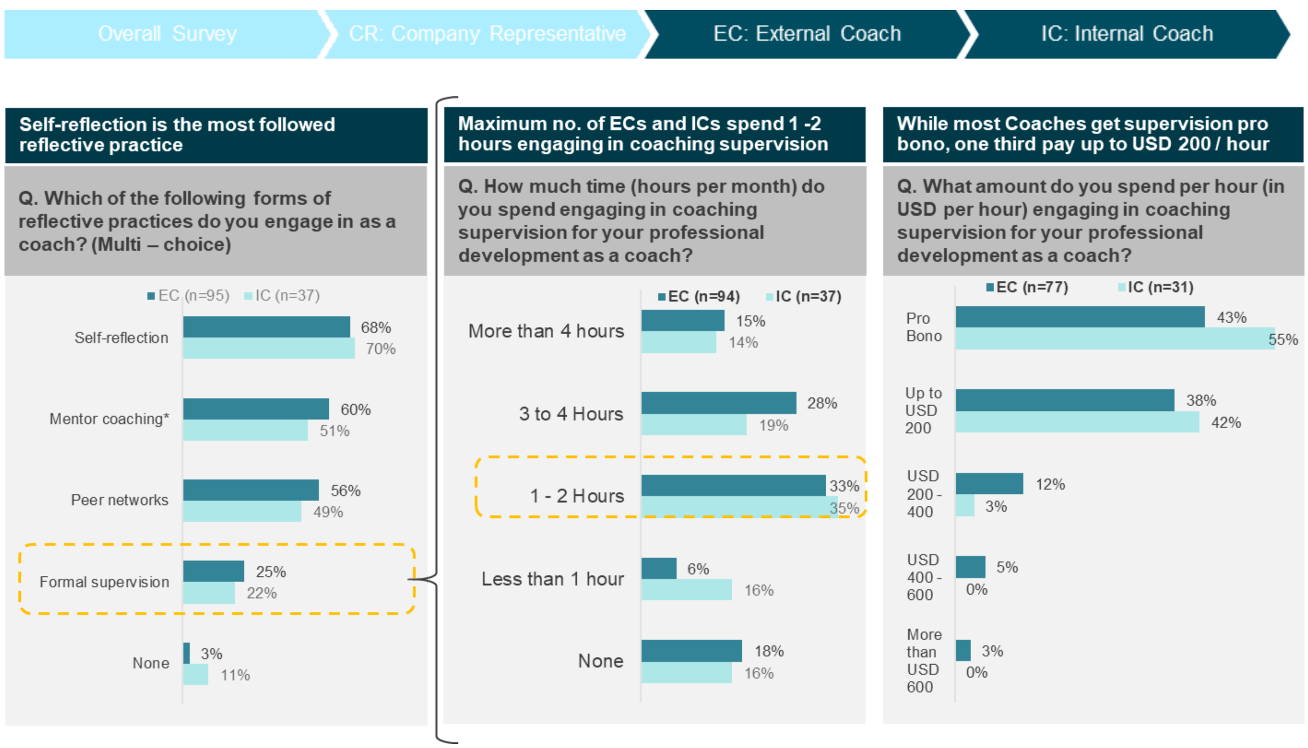
How can coaches keep continuing their learning process?

6.3 Reflective Practices/Coaching Supervision

Self-reflection as a reflective practice is the most commonly used practice (68% ECs and 70% ICs) followed by mentor coaching (EC 60% and IC 51%) and peer networks (56% and 49%) and **Formal coaching supervision** is also being used by coaches (25% ECs and 22% ICs)

Highest number of ECs and ICs spend 1-2 hours/month on engaging in coaching supervision (EC: 33% IC: 35%)

While most Coaches (43% ECs and 55% ICs) say they get supervision pro-bono, 38 % EC and 42% IC say they pay up to USD 200/ hour.



Something to ponder:

How is self reflection strengthen coaches development?

How is the value of formal Supervision distinct from Mentor Coaching and Peer Network learning and how does it enhance the quality of coaching? How do we ensure the quality of supervision?

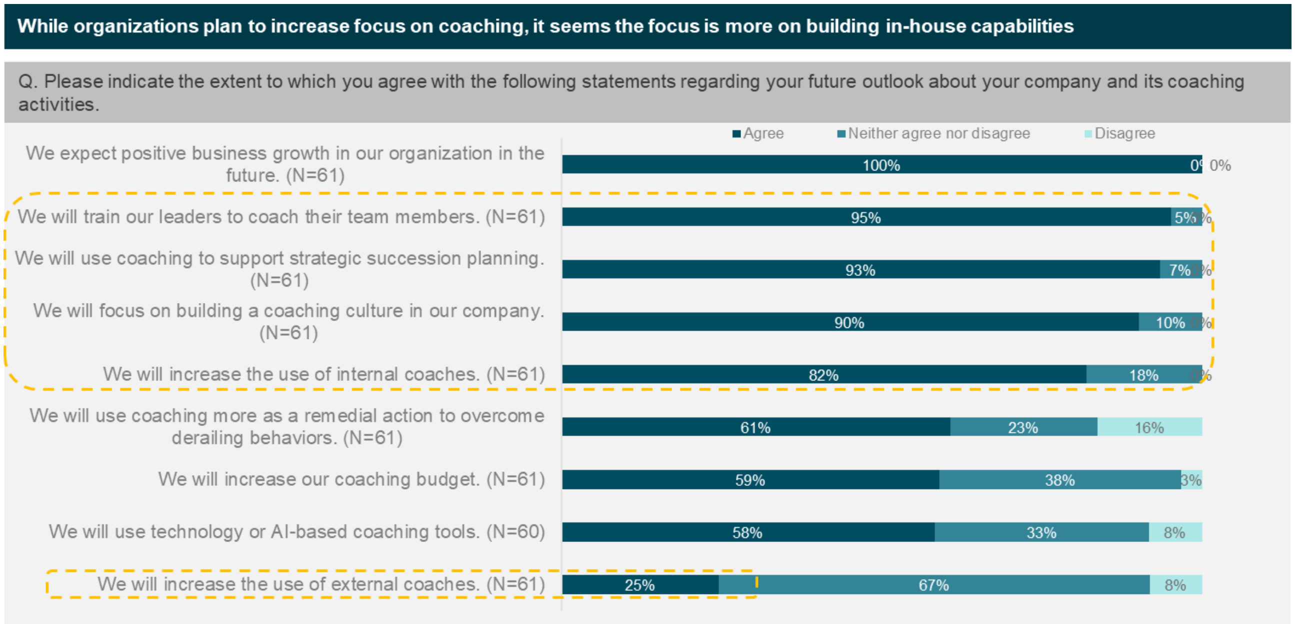
8. Future Outlook

7.1 Organizations Perspective on Future Outlook

While organizations plan to increase focus on coaching, it seems the focus is more on building in-house capabilities

100% Companies expect positive business growth in organization in the future. 95 % companies will train their leaders to coach their team, 93% will use coaching to support strategic planning, 90% will focus in building coaching culture, 82% will increase the use of internal coaches.

59% companies also will increase their coaching budget, and 58% will use technology. and only 25% agree to increase the use of external coaches.



Something to ponder: While companies want to create internal capability for coaching, how could they use coaching intervention strategically to create a competitive advantage for their business? How can they capitalize on available external expertise to build on the internal resources? How companies build and maintain coaching culture and align it to their business growth.

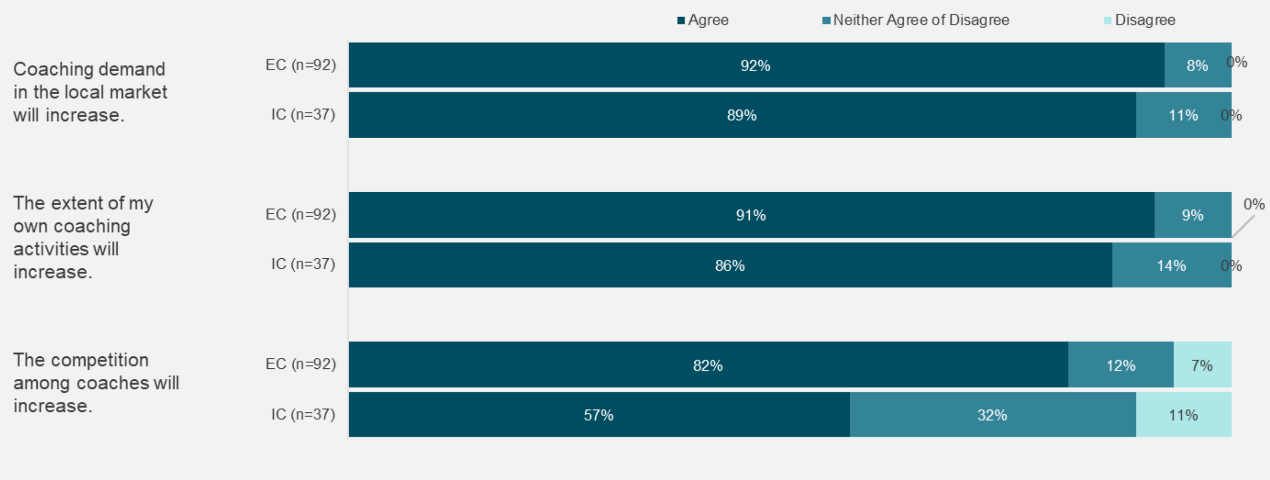
7.2 Coaches Perspective on Future Outlook

ECs and ICs are predicting the increase in all types of coaching services.

92 % EC and 89% IC predict that coaching demand in the local market will increase, 91% EC and 88% IC say the extent of their own coaching activities will increase, and 82% EC and 57% IC also say the competition among coaches will increase.

ECs and ICs are predicting the increase in all types of coaching services.

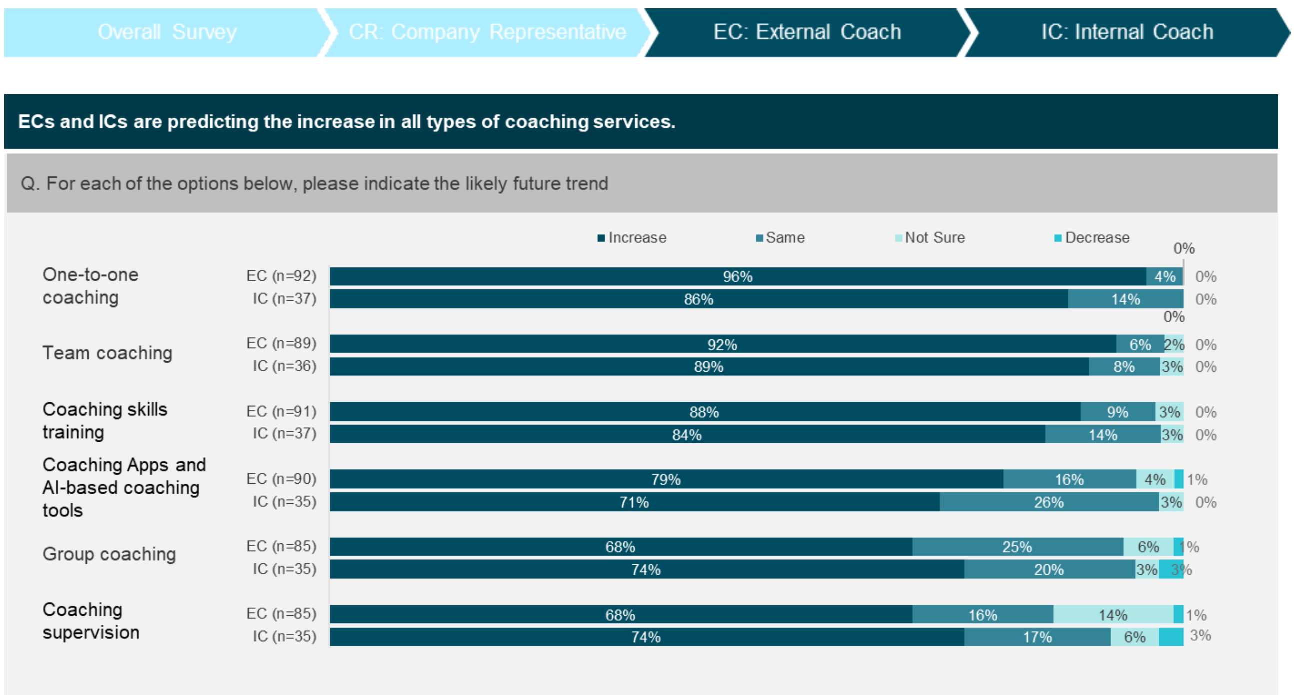
Q. Please give us your outlook about future developments in coaching within the next two years



7.3 Coaches Perspective on Future Outlook

ECs and ICs are predicting the increase in all types of coaching services.

While one-to-one (EC 96%, IC 86%) and team coaching (EC 92%, IC 89%) continue to rise, coaching skills training (EC 88%,IC 84%) and coaching Apps, AI based tools (EC 79%, IC 71%) are also predicted to rise.



Something to ponder:

With the increase in demand and supply, how will the future market evolve? In such a scenario, how can coaches deepen and broaden their skills to stay ahead of the competition? How can coaches adapt with technology?

9. Closing thoughts

We are happy to present to you the **Geography Report** for **Indonesia**, part of the **5th Coaching Survey – an Asia Benchmark.** Individual geography reports for Hong Kong, India, Mainland China, Philippines and Singapore are also available for a more detailed study.

The Integrated Report is available on our website to give you an in depth and comprehensive overall understanding of the coaching landscape for the six markets.

If as a reader and researcher you would like to dive deeper into any research question presented in this survey, you are welcome to reach out to us. We welcome your *feedback and comments, please reach out to:*

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10. We would like to thank you for participating in the survey

The success of this survey is attributed to your participation and an expanded reach across markets.