



## Summary of Strategy Session

October 18, 2006

### Vision

- We are the organization where coaches improve their coaching skills
- We are a vibrant and welcoming culture
- We market coaching and create awareness for the benefits of coaching

### Decisions

- This vision continues to be relevant, and we will continue to use it as a guide
- There were two suggestions for changing the first sentence:
  - Change “coaching skills” to “coaching and business skills”
  - Change “coaches” to “all levels of coaches”Most people agreed to the first change; and there were mixed opinions on making the second change. We decided to table these details for a later vote.

### This Year’s Focus

*As an organization, our 2007 focus will be the third bullet of our vision: to market coaching, the ICF, and our participant coaches. We will do this without losing sight of our culture and education initiatives.*

### Success Measures

At the end of 2007, we will know we have succeeded if:

1. We have business coming to our coaches through ICF
  - a. We will track referrals from our find-a-coach system, and follow-up with participant coaches to see how many of these have turned into clients. We will see an observable increase over the course of the year.
  - b. We will see more of our participant coaches collaborating on business initiatives: referring each other more frequently, forming strategic alliances, and otherwise working collaboratively on business opportunities.
2. We will increase our membership, and also attract more professional and high quality coaches
  - a. Membership will at least double
  - b. There will be a higher percentage of credentialed coaches participating consistently
3. There will be a higher awareness in Orange County of the ICF-OC as a source for coaching and education about coaching
  - a. If we do a survey at the beginning and end of the year we will notice a measurable difference in how well we are branded
  - b. More sponsors will show interest in supporting our group



## Strategic Initiatives:

### Find-a-Coach System:

We will redo our find a coach system so that the database has integrity, and searching it is a pleasure to our visitors. We have tentatively identified 3-4 people we can call for initial quotes, and are writing up a requirements document. We will bring back the results of our research to our board meeting on November 9<sup>th</sup>. Our goal is to get this project moving immediately, so that we can be prepared to market to our website more aggressively in January.

### Marketing:

The marketing team will have at least three members. Initiatives will include: (1) community events (possibly fundraisers), (2) inviting local businesses to sponsor us (which raises awareness and also provides additional funds to the marketing budget), (3) Public relations – capitalizing on available coaching articles, (4) one strategically and consistently placed ad – possibly for the whole year, and (5) I forgot – so someone from the marketing team may need to edit this paragraph. In general, all marketing will be targeted towards “coach buyers”, ie: corporations, small businesses, and individuals. Our marketing to coaches will consist of periodic mailings that advertise our signature events, and having an “inside out” membership initiative.

### Membership:

Our “Inside out” Membership strategy focuses on providing excellent service to members throughout the entire cycle of membership, from when they first inquire and visit as a guest, to when they join as a participant, throughout membership, including when they choose to no longer renew. Diane has drafted a strategy, highlights of which include: having a team of “buddies” to watch over new people at the meetings, having “member value” informational sessions between the BCE and the headliner every month, and making “we miss you phone calls” to participants who have missed a few meetings.

### Programs:

The Programs plan has been put together to appeal to both senior coaches and beginning level coaches, so that we include and attract all levels of coaches in our chapter activities. We are planning our programs out a year in advance, and adding additional potential formats to our mix, such as teleclasses, success teams, and fee-based workshops. We will be posting our event calendar on the website so speakers can put in requests to participate. There will be at least three members on the programs team, with room for a couple more. Lydia has a detailed plan.

### Publications:

We are continuing to upgrade the newsletter, and use it as a polished marketing vehicle. Some ideas for next year include interviews of individual coaches (perhaps those who are in the member spotlight that month), and continuing the process of strategically focusing our publications to support our marketing, programs, and membership efforts.

### Logistics:

One key initiative is that we will create a process to always have the sign in table covered by participant coaches who are professional, warm, and knowledgeable. This system needs to work consistently so that the directors of logistics and membership are freed up to handle other issues. In addition, although this was not discussed, we will need to discuss the possibility of moving to a new facility, and we’ll need a project manager and task force to manage the process.



## Potential Obstacles

1. Success may swamp us, and people may lose ICF bandwidth as they focus on responding to the needs of their customers
2. The development on the find a coach system could end up taking longer than we expect – and we could run into “project creep” issues that delay our ability to use or market the system.
3. It may be difficult to balance our presentation of ICF as a place to go for business and life coaching.
4. Limited resources: money, time, people
5. We may get so focused on marketing, growing membership and getting business that we lose sight of the importance of high quality educational programs, and maintaining a warm and vibrant culture.

## Strategies to prevent or manage obstacles:

1. Mentor and enroll new participants so that we have plenty of enthusiasm and bandwidth on the leadership team. Don't be afraid to pack the leadership team – the more enrollment, the better.
2. Make sure we prioritize on bare bones functionality and lay out the find a coach development effort in stages if needed to make sure we meet deadlines. Goal – have it up and running by January.
3. Make sure to create a marketing plan and have both life and business coaches review it to ensure that both aspects are adequately represented.
4. Coach each other to stay focused and maintain time boundaries.
5. Be willing to back burner really great ideas so we can focus on the one or two most important ones.
6. Publicly recognize and appreciate board and committee members for their service.

## Roles and Responsibilities

In general, we have a strong, enthusiastic team. Some positions are open, and some members are deciding amongst various roles. We will definitely have enough people to pull together strong teams to support each director this year. Way to go!

Currently, our most pressing need is to find at least one good candidate for secretary next year. This person should make every meeting, or take responsibility for having someone cover it. They should enjoy taking notes, be great at organizing information, learn the chapter by-laws, make sure we are running our meetings and making decisions correctly, participate in executive leadership conversations, and possibly be our conduit to ICF global, not only for CEU credits, but to make sure we are aware of the resources available to us.

Please keep your eyes open for good candidates – we will need to make the nominations official very soon!

## Conclusion

What an awesome team – we have big dreams this year, and great people with the enthusiasm and know-how to make them happen! Let's spread the word to our fellow participants to join with us in creating an organization that educates us, supports us, and markets us!