

ABC's of "One-to-One Coaching"

"One-to-One Coaching" provides an opportunity for aspiring managers to gain advice and insights from senior finance professionals who provide volunteer support.

What does "One-to-One Coaching" cover?

It's open-ended and informal. The aspiring manager sets the agenda. As an aspiring manager, how would you like to benefit? Maybe, you're looking for general career advice. Or, perhaps, you face some particular decisions and would value another perspective. Or, you may simply want to expand your network and get some better insights into the opportunities and challenges of financial management leadership. Think about the various ways in which you'd like to benefit. A volunteer coach isn't expected to have all of the answers. Rather, he or she will help you find the answers that are right for you.

What commitment is involved?

It's up to the aspiring manager and the volunteer coach. We recommend that you have a clear understanding about your relationship so that it's mutually rewarding. The draft "Statement of Mutual Understanding" on the next page offers some items to discuss (confidentiality, topics of interest, availability, etc.) once you've found a match and decided that the chemistry is right to continue.

How do I find a match?

Search the "Coaches Gallery" in the "Coaching Corner" section of www.csmfo.org and learn about the volunteer coaches. Do you want someone in your area to meet with in person or are you interested in someone outside the area and plan to communicate by phone and email? Choose a prospective coach. Call or send him or her an email to check on availability and to request a telephone appointment to explore the fit.

What are some guidelines to help the coaching discussions be productive?

You can have a very productive coaching session in an hour or less. Don Maruska, Director of the CSMFO Coaching Program, has prepared [Being a Great Coach and a Winning Player](#) (available on the CSMFO website under "Coaching Corner") and is leading a session on "Being a Great Coach and a Winning Player" 3:00 – 4:00 p.m. Wednesday, March 16; a recording will be available on the "Coaching Corner" of www.csmfo.org to demonstrate the approach.

What do we do when it's time to change the relationship?

The coaching arrangements are voluntary and either the volunteer coach or aspiring manager can change or end the relationship. We simply ask that you inform one another of the change in circumstances and give thanks for whatever you have gained together.

CSMFO Coaching Program – *insights and support to thrive in your finance career*

see "Coaching Corner" at www.csmfo.org
or contact the Director at don@donmaruska.com

Statement of Mutual Understanding -- One-to-One Coaching CSMFO Coaching Program

We are voluntarily entering into a coaching relationship which we hope will be of benefit to both of us and to CSMFO. We want this to be a rich, rewarding experience. The following elements outline how we intend to proceed.

- **Confidentiality** (What information, if any, will you share with others about the details of your coaching relationship?) _____

- **Intended duration of the relationship** (We suggest an initial term of 3 to 6 months.) _____

- **Frequency and form** (in person, phone, email) of contact (We suggest connecting at least 1 time per month to maintain continuity and sustain momentum.) _____

- **Approximate amount of time to be invested by Coach** _____

- **Requested role of the Coach** (model, guide, observe and give feedback, recommend developmental activities, facilitate learning, suggest/provide resources, etc.) _____

- **Additional points** _____

- We agree to a *no-fault* conclusion of this relationship if, for any reason, it seems appropriate.
- We agree that the aspiring manager is responsible for his or her choices and actions throughout the One-to-One Coaching. The Coach is not responsible for how the aspiring manager uses any advice or perspectives offered.

Coach

date

Aspiring Manager

date

If you'd like further information about One-to-One Coaching or other aspects of the CSMFO Coaching Program, please go to "Coaching Corner" at www.csmfo.org.