



## **Standard 3 – Case Study**

### **Title: Maintaining Confidentiality**

#### **Background**

Confidentiality is extremely important when creating a safe place for a client. The levels of confidentiality that are agreed upon ahead of time will be of utmost importance for a coach and client relationship. There should be an agreement that is signed ahead of time which outlines the ways that the coach will keep their client's information confidential. How should that look for technology? Can confidentiality remain with today's technological resources?

#### **Case study**

Marcos had been an internal coach for the XYZ Corporation for a couple of years now. It had been a high risk for senior management to bring in an internal coach, but the risk had proven to pay off. They had noticed a 10% increase in productivity which was more than they had initially expected. XYZ was very pleased with Roger and the relationship there was strong.

One day, Marcos was asked to meet with the Human Resources Director. During the meeting, he was asked to forward an email to the HR Director that a client of his had sent him a few weeks ago regarding an issue he had with one of his colleagues. His client had mentioned it in an email to him as a topic that he wanted to discuss during their next coaching session and had divulged some information. Marcos felt uncomfortable with doing that and mentioned it to the HR Director. But HR insisted that he send it since this email was on the company's email platform.

Marcos really didn't know what to do. He understood that his employer was ultimately XYZ Corporation, but didn't he also owe it to his client to keep their conversations between the two of them? Without agreeing or disagreeing, Marcos respectfully avoided answering and left the HR Director's office a few minutes later. He wanted a chance to look at his coaching agreement with this client first.

There was the obvious verbiage about not sharing confidential information. But what does it mean when the company asks for information when it was through a work email? The contract didn't mention anything about what could be divulged when it came to sending private information on technology related work platforms. This was a very tough situation and Marcos decided he was going to need to reach out to some other coaching colleagues to get their input on what he should do next.

#### **Implications for Coaching**

- Confidentiality is essential and all parties should be aware—when an internal coaching agreement is in place, the organization and coach should clearly decide what confidential

policies will be created. Then those policies should be clearly outlined in the coaching agreement so that the client is also clear on what may be reported back to the organization. **ICF Code of Ethics (2020) Section 1, Standard 3 (Coachingfederation.org)**

- All terms of the coaching engagement should be outlined—the coach should hold the responsibility of setting clear lines with the organization and the client ahead of time so that all terms are clearly understood and agreed upon. **ICF Code of Ethics (2020) Section 1, Standard 1 (Coachingfederation.org)**
- Internal coaches and the organization should have a coaching agreement—the coach and the organization should have a coaching agreement in place ahead of time that covers all areas of confidentiality. This can eliminate any confusion or grey areas when a coach is asked for information that is confidential to their client. **ICF Code of Ethics (2020) Section 1, Standard 6 (Coachingfederation.org)**

### **Possible outcomes or next steps**

- **Seek outside support.** A coach in any ethical conundrum may choose to turn to their coach, mentor coach, coach supervisor, training program, or coaching organization for support in navigating ethically confusing situations.
- **Clarify the terms with the organization.** The coaching agreement with the organization may need to be revisited when grey areas come up that haven't been an issue previously. The coach may want to propose reviewing the agreement with the organization every year to ensure that all areas are covered.
- **Communicate with the client.** The client should be made aware that confidential information may have to be shared with their employer. The coach should also revisit their agreement with their clients to ensure that it covers all situations.

### **Discussion Points**

- What resources can you turn to as a coach?
- If you were this coach's coach, mentor, or supervisor, how would you support the coach?

### **Reference**

ICF Code of Ethics (2020), <https://coachingfederation.org/ethics/code-of-ethics>