



2020 STUDY OF INTERVENTIONS FOR ORGANIZATIONAL DEVELOPMENT IN SOUTH EAST ASIA, INDIA AND HONG KONG



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FOREWORDS

Foreword by Joel A. DiGirolamo

Imagine for a moment that you are preparing for an ocean sail. You will not leave your safe harbour without your charts—your maps showing reefs, shoals, barren atolls, and fertile paradise islands. For your organization, data are those charts. Once you have compiled the data, it can show the zones of danger but also the potentially lucrative regions of growth, development and profit. You will be able to make informed and intelligent decisions.

This valuable report, commissioned by the ICF Singapore Coaching Science and Research Committee, gives organizations in the region detailed charts of applications and trends of human process interventions for organizational development. The data provides benchmarks, perspectives, and insights into your efforts relative to other organizations in the region. From there you can plan your organizational development initiatives, choose areas for action, and decide on when to do so.

This commendable work is a treasure trove of useful data for any organization in the region. Organizational development practitioners and the coaching community will find this data and the analysis helpful to keep informed of the latest trends, ensuring continued relevance and prominent positioning in the marketplace during these unprecedented times.



Joel DiGirolamo

Director of Coaching Science

International Coaching Federation



Forewords by HR Institutes

This report comes into the organizational development (OD) industry in Asia at a time of innovation, digital transformation and a year of change that required quick adaption for many organisations. In 2020 where traditional norms have been greatly impacted, initiating conversations that redefine the future of OD is critical.

In this new decade, OD will play an instrumental role in identifying and responding to the needs of a younger workforce, the digital nomads, who have grown up in a digital world - motivating, managing and unlocking their potential. This report gives us a great overview of how the industry is shifting its focus to embrace the evolving workforce in the region.

Whilst traditional OD interventions like training remain widely important, they will need to be repurposed as the world continues to be affected by COVID-19. In this context, OD can make sure that people intelligence complements business intelligence with a more holistic approach. This will inevitably bring OD to the forefront of change, as shown in the report. It is encouraging to see that respondents are embracing uncertainty and seeing opportunities for OD growth, even during a global crisis.

Finally, seeing HR institutions and ICF Chapters across the region coming together to advance the body of knowledge, to move the OD industry forward makes me hopeful. I believe we will be seeing more people professionals and business leaders engaging in similar projects in the future and initiating the formation of a new age of collective leadership.



Alvin Aloysius Goh

Executive Director

Singapore Human Resource Institute



Forewords by HR Institutes

The virtual world is our reality today.

This crisis gave us the opportunity to collaborate more actively across the globe.

Boundaries have fallen away, and we are seeing the rise of the global talent pool.

Congratulations ICF for this research project which will support creating the ‘better normal’ in HR and OD. It is our honour at the People Management Association of the Philippines, to contribute to thought leadership founded on research. Data is important, as we look at how we might re-invent HR and transform our organizations to continuously strive to uplift humanity.

Let us translate the information in this report into actionable insights which will form initiatives that advance people practices. Measuring and enhancing the impact of OD in organizations is the key to taking forward initiatives long term, to sustain culture and people development. Ensuring clarity on the return on investment is a core capability that organizations and OD practitioners share an equal responsibility to build. OD at its best goes beyond one-off interventions to being a strategic enabler of business and people’s successes.

PMAP is committed to the philosophy of ‘people first’ in the triple bottom line. Let us shape the new workplace with this shared perspective. Together we can bring people, management, and organization development to higher ground.



Angelina Mukhi

President Elect

People Management Association of Philippines



Forewords by HR Institutes

Congratulations to the ICF Singapore Chapter for commissioning this study on organizational development (OD) initiatives in our region. It has been a privilege for the National Human Resources Development Network (NHRDN) to partner with your organization on this research.

Research such as this is always a valuable resource for human resources and business professionals to learn and understand the present state of OD initiatives across organizations. Insights and perspectives from the research can be used to benchmark their own initiatives and compare against contemporary practices enabling better decision making. For OD practitioners and independent service providers, this report will provide a good understanding of prevailing OD trends, serve as a reflection of market needs and offer the opportunity to stay up to date with the latest practices in their areas of interest.

At NHRDN, we strive to further our thought leadership in areas related to human resources (HR). In collaborating on such an initiative, we hope that we will be able to provide access to the latest research and knowledge in their field. That this study attracted significant participation from India is noteworthy and therefore the findings will be of even greater relevance to our HR fraternity.

The global pandemic has accelerated changes on several fronts in organizations. We expect the next decade to usher several changes in HR and OD as organizations set fresh direction and raise ambitions to grow and thrive. We hope that the insights from the research will help steer the course of OD initiatives in the foreseeable future.



Dr Krish Shankar

National President

National Human Resource Development Network, India



INTRODUCTION

About us

The International Coaching Federation (ICF) is the largest non-profit professional association worldwide for personal and business coaches, with 38,249 members across 146 countries and territories. The ICF aims to build, support and preserve the integrity of coaching around the globe. The ICF Singapore Chapter consists of more than 700 professional coaches and people interested in coaching.

This uniquely positioned research project is designed and developed by ICF Singapore Coaching Science and Research Committee, and commissioned by ICF Singapore Chapter.



The study

Background

In a constantly changing volatile, uncertain, complex and ambiguous (VUCA) world brought about by globalization, and further fuelled by the COVID-19 pandemic, the success of organizations is influenced by their ability to adapt, develop and deliver sustainable change.

Organizations use multiple organizational development (OD) processes to improve visioning, empowerment, learning and problem solvingⁱ. CIPDⁱⁱ mentions four types of approaches for OD processes, including human process interventions like coaching, training, and mentoring, among others. Being a coaching organisation, we are particularly interested in exploring the interplay between coaching and other human process OD interventions.



Following a review of existing research, we identified a gap in comparative studies of human process OD interventions. We initiated this research study to examine that gap.

The study

Purpose

As the first of its kind in South East Asia (SEA), India and Hong Kong, our study examines the awareness, perceptions, applications and trends of human process OD interventionsⁱⁱ across a range of organizations, industry sectors and decision makers.

Aims of the research:

- 1** **Develop** awareness of OD interventions in SEA, India and Hong Kong, and highlight key trends across different types of organizations, countries and industry sectors.
- 2** **Compare** coaching, consulting, counseling, mentoring and training, and provide an insight into how people professionals and other stakeholders select, implement and evaluate OD initiatives in the region.
- 3** **Understand** how coaching is being positioned in relation to other OD interventions. By using a coaching lens we can gain a better understanding of demand, future opportunities and the risks that coaching professionals are facing in the region.
- 4** **Explore** the impact of the COVID-19 pandemic on OD investment across the region and gain an understanding into how key stakeholders and decision makers are navigating organizational life in these unprecedented times.

A pioneering study to explore trends of human process organizational development interventions across South East Asia, India and Hong Kong.

Definition of key terms

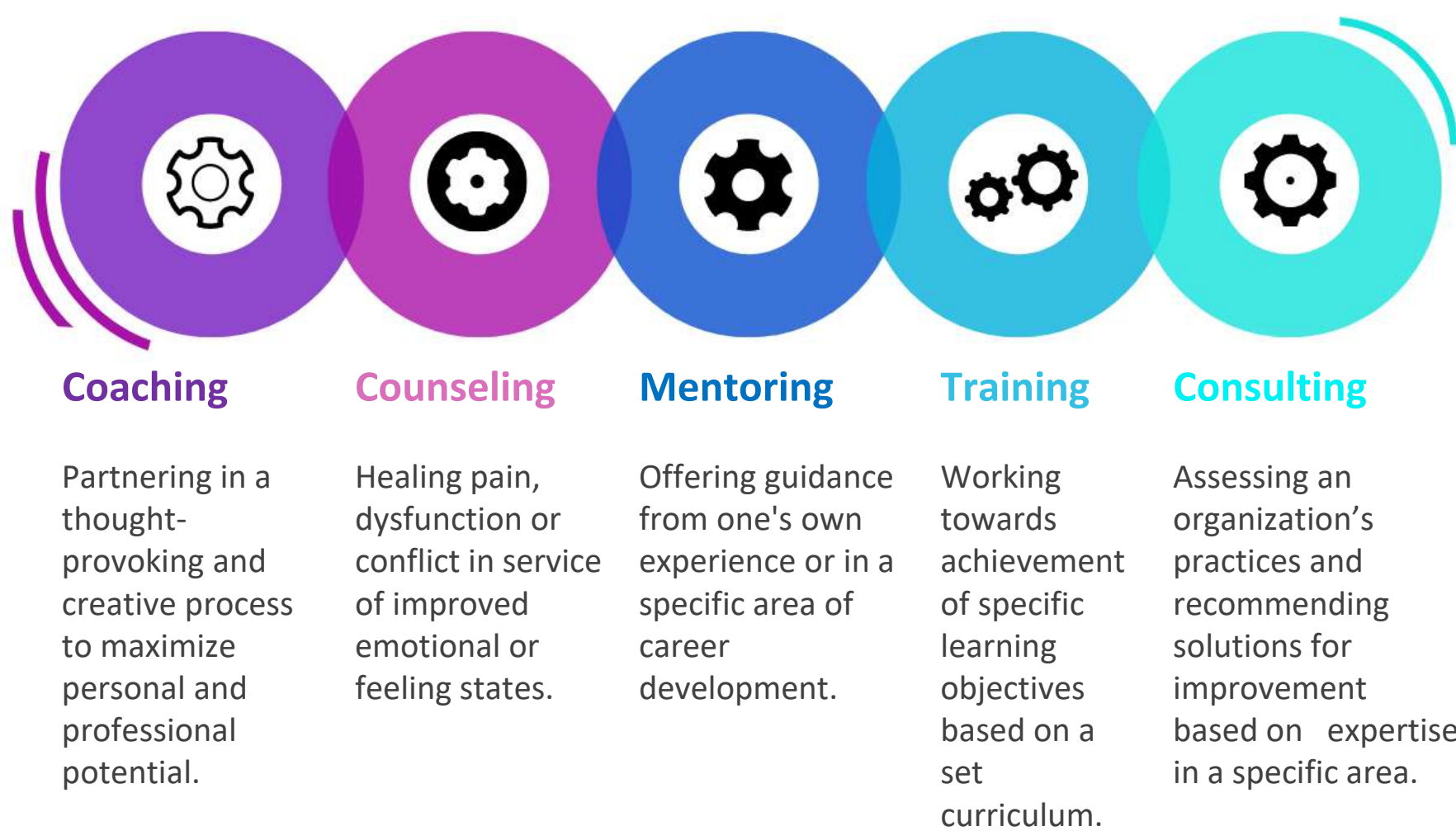
Organizational development (OD)

For this survey, organizational development is defined as a planned strategy to enable change in organizations through the development of people, functions, culture, behaviors and performance to better adapt to new technologies, markets and challenges.

Interventions for organizational development

We narrowed our focus to five interventions for the survey, namely coaching, counseling, training, mentoring and consulting. The following definitions are used for each intervention, based on ICF’s Global Consumer Awareness Studyⁱⁱⁱ. For the purpose of this survey and report, the following interventions are referenced as ‘interventions for OD’. Coaching may be delivered at an individual, team or organizational level.

Figure 1: Interventions for organizational development





Survey design and testing

Having defined the scope of the study, we designed the survey to explore four key themes: awareness, perceptions, applications and trends in human process interventions for OD (namely coaching, counseling, mentoring, training and consulting).

We developed the key themes further through exploratory conversations with HR and OD industry leaders and HR associations. This then formed the backbone of the survey design.

Several rounds of evaluation were conducted where the questionnaire was quality tested and peer reviewed by eight HR experts and industry leaders over a period of six months.

Pre-launch, we tested the chosen survey platform with a network of people professionals and OD consultants. We finalized the survey design, piloted in November 2019, and launched it at the end of January 2020.

Target audience

The target audience of the survey are decision makers who are wholly or partly accountable for organizational development, locally, regionally or globally.

Over 1,300 respondents answered the survey from 9 countries in the region. Of which, 821 fully completed questionnaires were analyzed. Around 35% were unable to complete the survey, since they were not OD decision makers.

Our collaboration partners

The survey was conducted online between January 2020 and June 2020 in partnership with:

- ICF chapters in Singapore, India (Bengaluru, Chennai, Mumbai and Pune), Philippines, Hong Kong, Malaysia, Indonesia
- the Asian Pacific Alliance of Coaches (APAC), and
- leading HR institutes such as the Singapore Human Resource Institute (SHRI), People Management Association of Philippines (PMAP) and National Human Resource Development Network (NHRD) from India

Distribution of survey

We sourced the respondents through a combination of partner institutes reaching out to their members, a social media campaign (via LinkedIn, Facebook, Instagram and email), and word of mouth, which resulted in around 51,000 touchpoints.

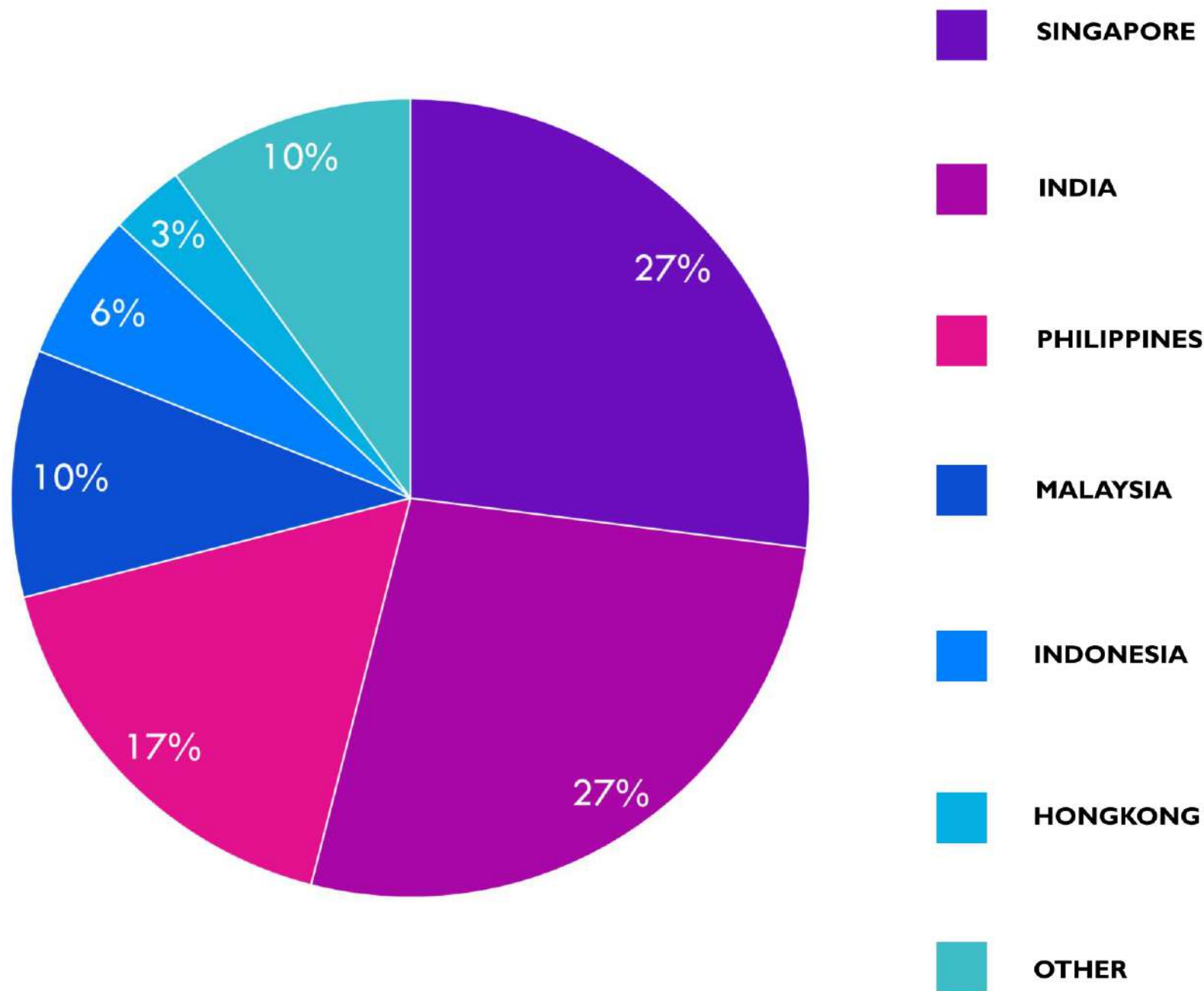


**9 Countries | Over 1,300 Professionals |
821 Fully Completed Responses**

The region

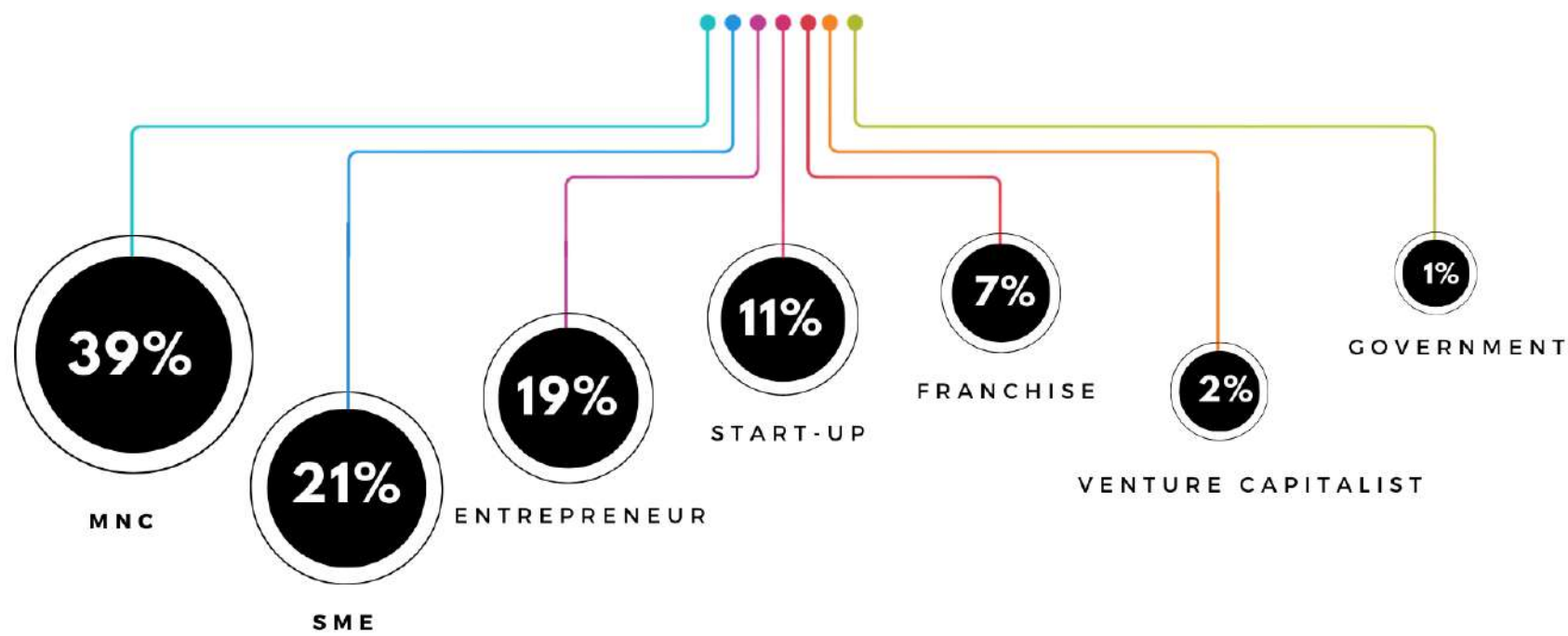
For the purpose of this study, participant countries are referred to as ‘the region’.

Figure 2: Countries represented by survey respondents



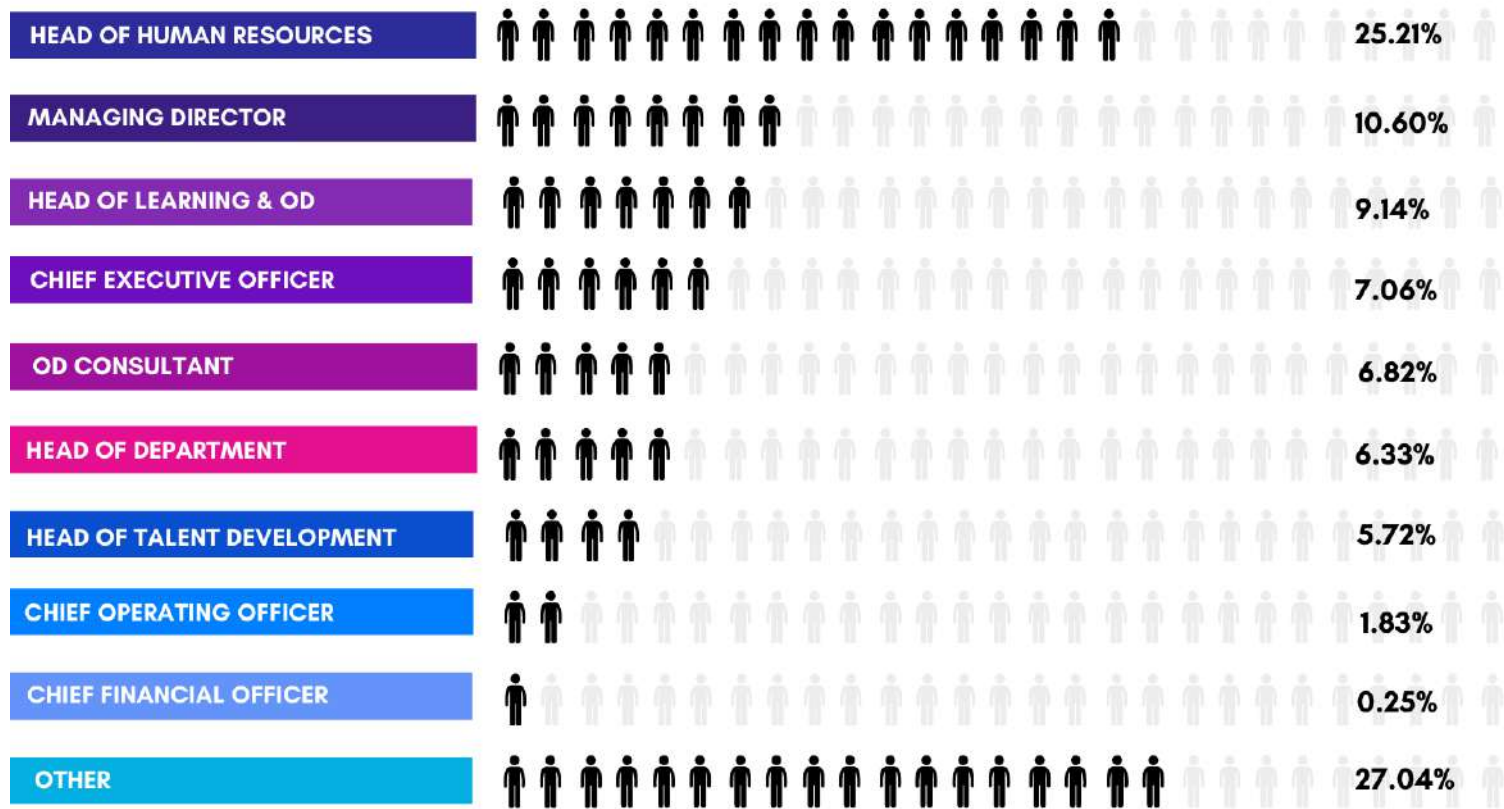
Types of organization

Figure 3: Types of organization represented by respondents



Respondent role

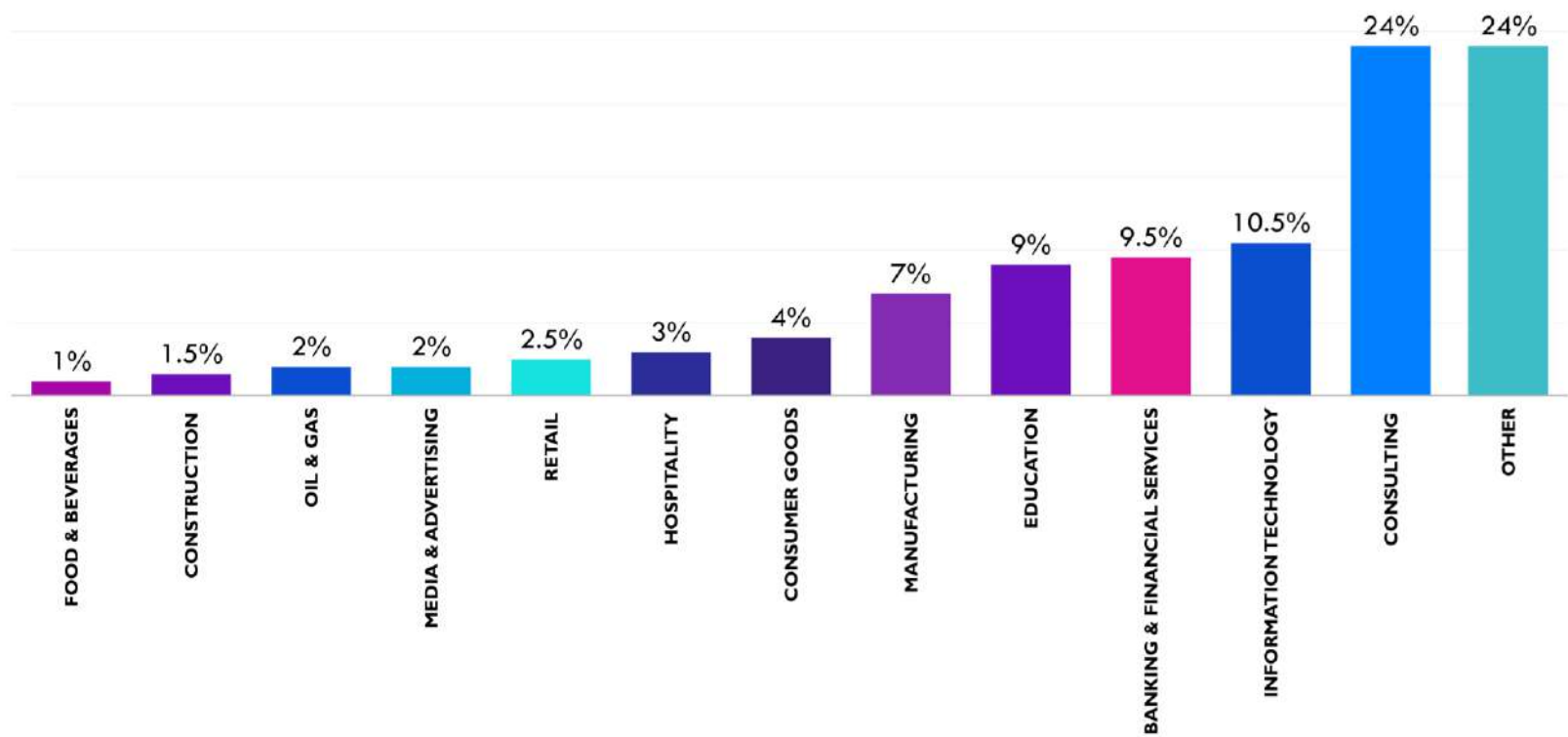
Figure 4: Roles represented by respondents



*Participants that selected 'Other' (27.04%) and specified varied titles, 14.75% are grouped as senior people professionals, 4.75% as variations of C-Suite roles, 3.53% are coaches/consultants, 1.10% are owners/founders/proprietors, 3.41% are titles that cannot be grouped. For the purpose of this report, all titles related to managing and developing people (HR, people development, talent development, learning and development, HR business partner, etc.) are referenced as 'people professionals'; and all roles relating business and management are called 'business leaders'.

Types of industry

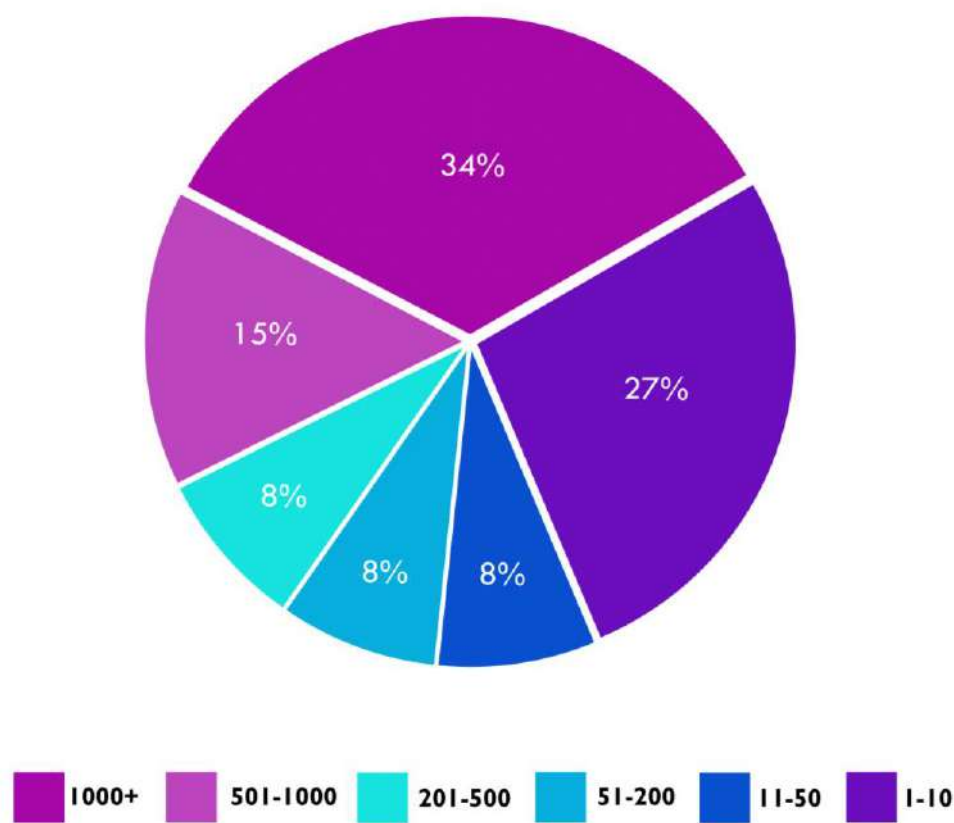
Figure 5: Types of industry represented



Please see the Appendix for list of industries specified under ‘Other’.

Total number of employees worldwide

Figure 6: Total number of employees worldwide



SURVEY RESULTS

EXECUTIVE SUMMARY

Executive summary

As the first of its kind in the region, the 2020 Study of Interventions for organizational development in SEA, Hong Kong and India explores the perceptions, applications and trends of human process organizational development (OD) interventions, specifically coaching, consulting, counseling, mentoring and training.

OD practices have been central in shaping the culture, supporting people and transforming organizations for several decades. Over the years, a variety of methods and processes have been developed enabling practitioners to prepare for, and manage, change. Most OD interventions have been researched thoroughly, however little is known about the interplay between these five OD interventions (coaching, consulting, counseling, mentoring and training), as well as their application and impact in the region. We, at ICF Singapore, embarked on this research study with the aim of bridging that gap. Moreover, as professional coaches we wanted to enhance our understanding of how coaching is positioned amongst these human process OD interventions and explore differences between countries, types of organizations and industries across SE Asia, India and Hong Kong.

Whereas some of the study findings reaffirm established views, others offer new insights on the current state of play of OD practices in the region. It should be noted that findings have been largely consistent across the region and all notable differences are highlighted in the report. It is our opinion that practitioners and organizations can benefit from the opportunities and challenges shared in the findings on the rapidly evolving OD needs, particularly during these unprecedented times.

Executive summary

The study has also helped us bring together multiple communities and initiate meaningful conversations across the region. A brief summary of this is shared below:

- 9 ICF Chapters in the region and Asia's second largest coaching association, Asia Pacific Alliance of Coaches (APAC) collaborated for the first time to conduct such a research
- 3 of the largest HR associations in the region joined the project as our official named partners (SHRI from Singapore, PMAP from Philippines and NHRD from India)
- Over 1,300 people professionals and business leaders responded to the survey, with 821 fully completed responses
- The target respondents of the survey were decision makers who are wholly or partly accountable for OD, locally, regionally or globally
- Singapore, India, Philippines, Malaysia, Indonesia, Hong Kong, Thailand, Cambodia, Vietnam are represented in the sample (1.7% responses were outside the region).
- Industries represented (including and not limited to): consulting, IT, education, banking, manufacturing, consumer goods, hospitality, oil and gas, food and beverages.
- Types of organizations represented (including and not limited to): MNCs, SMEs, entrepreneurs, start-ups, venture capitalists, franchise, and government
- Size of organizations represented: 1,000+ (34%), 501 to 1,000 (15%), 201 to 500 (8%), 51 to 200 (8%), 11 to 50 (8%) and 1 to 10 (27%)

Summary of results (Part 1)

1 Training as an intervention is central to OD practices with over 30% of respondents reporting a preference for training over other modalities. However, a trend is emerging where one-to-one interventions, and in particular coaching is gaining momentum.

2 Organizations in the region use a range of diagnostic tools to identify OD needs. Interestingly, only one in two organizations systematically measure return on investment (ROI) of OD interventions.

3 72% of respondents state that people (25%), skills (25%) and cultural (22%) development are driving organizations' OD agenda in the coming year. When it comes to people development, including leadership, succession planning and engagement of the workforce, coaching emerges as the top choice of intervention.

4 Organizations in the region are seeking to develop more internal expertise in delivering OD Interventions as reflected in an 80% expected increase in internal delivery of training,



78% in mentoring, 75% in coaching, 54% in consulting and 53% in counseling.

Summary of results (Part 2)

5 Expertise in delivering multiple OD interventions is highly desired for choosing service providers by organizations in the region as highlighted by 67% of the respondents. Organizations are looking for experts who can identify OD needs across the board, switch between OD modalities, and deliver customized solutions to achieve best results

6 Credibility, reputation and professionalism are driving external coach selection in the region as highlighted by 34% of the respondents. Additionally, coaching credentials are valued by people professionals and business leaders, with highly qualified coaches earning as much as 10 times more than non-credentialed coaches.

7 Over 75% of respondents report a positive perception of coaching, with 41% of them showing an interest in working with a coach.

8 Despite concerns of significant slowdown of OD investment as a result of COVID-19 pandemic organizations report that OD remains at the forefront of managing change. Respondents identify innovation,

digitization, employee wellbeing and development of internal OD capabilities as key areas of focus for organizations in the region



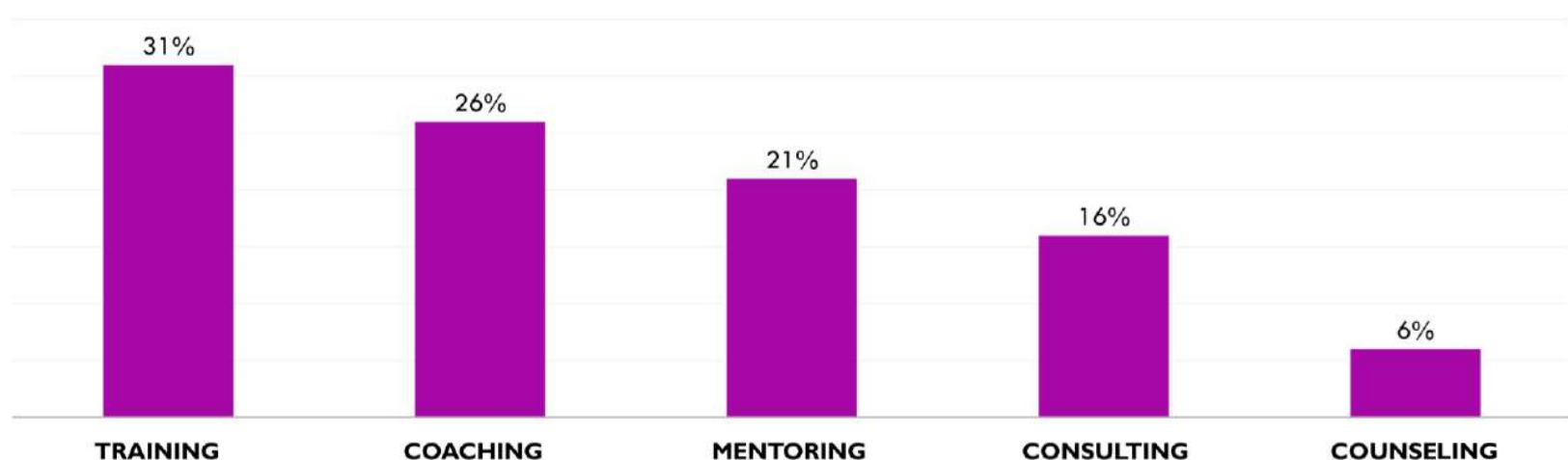
INTERVENTIONS FOR OD

Previous year: training is the top intervention for OD

OD interventions are designed to improve organizational effectiveness and are updated on a regular basis. For that reason, we asked respondents to pick the top three interventions that best serve their OD needs in the previous and following fiscal years. Our data indicates, for the previous fiscal year, that about a third of the respondents consider training (31%) to be the top OD intervention used, followed closely by coaching (26%) and mentoring (21%).

Training is also identified as the top OD intervention by at least 30% of respondents across the three countries with the largest representation in our study (India, Philippines and Singapore). Also, in exploring differences amongst different types of organisations, we notice that start-ups (with training at 26% and coaching at 26%) and entrepreneurial firms (with training at 28% and coaching at 27%) opt for coaching and training interventions in almost equal amounts.

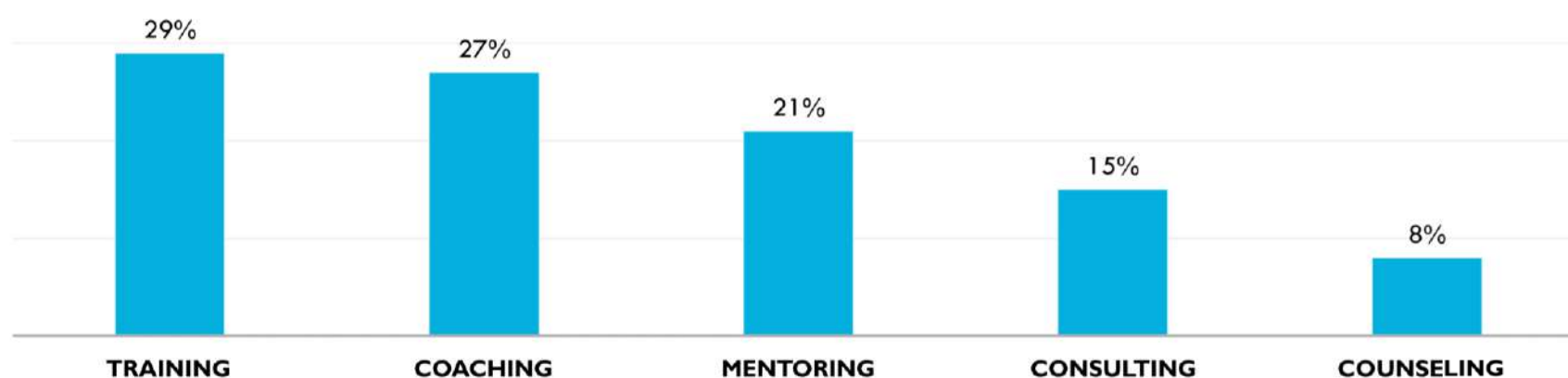
Figure 7: In the previous fiscal year, what were the top three interventions used for organizational development?



Next year: coaching comes on-par with training

Looking at the next fiscal year, coaching interest shows an increase of 2% (at 28%) and is expected to come on-par with training (27%) across the region. In Singapore, interest in coaching is even higher with a third of the respondents showing a preference for coaching, up from 25% in the previous fiscal year. Likewise, for start-ups (with training at 25% and coaching at 27%) and entrepreneurial firms (with training 24% and coaching 30%), coaching is also becoming the most popular OD intervention.

Figure 8: In the following fiscal year, what might be the top three interventions used for organizational development?

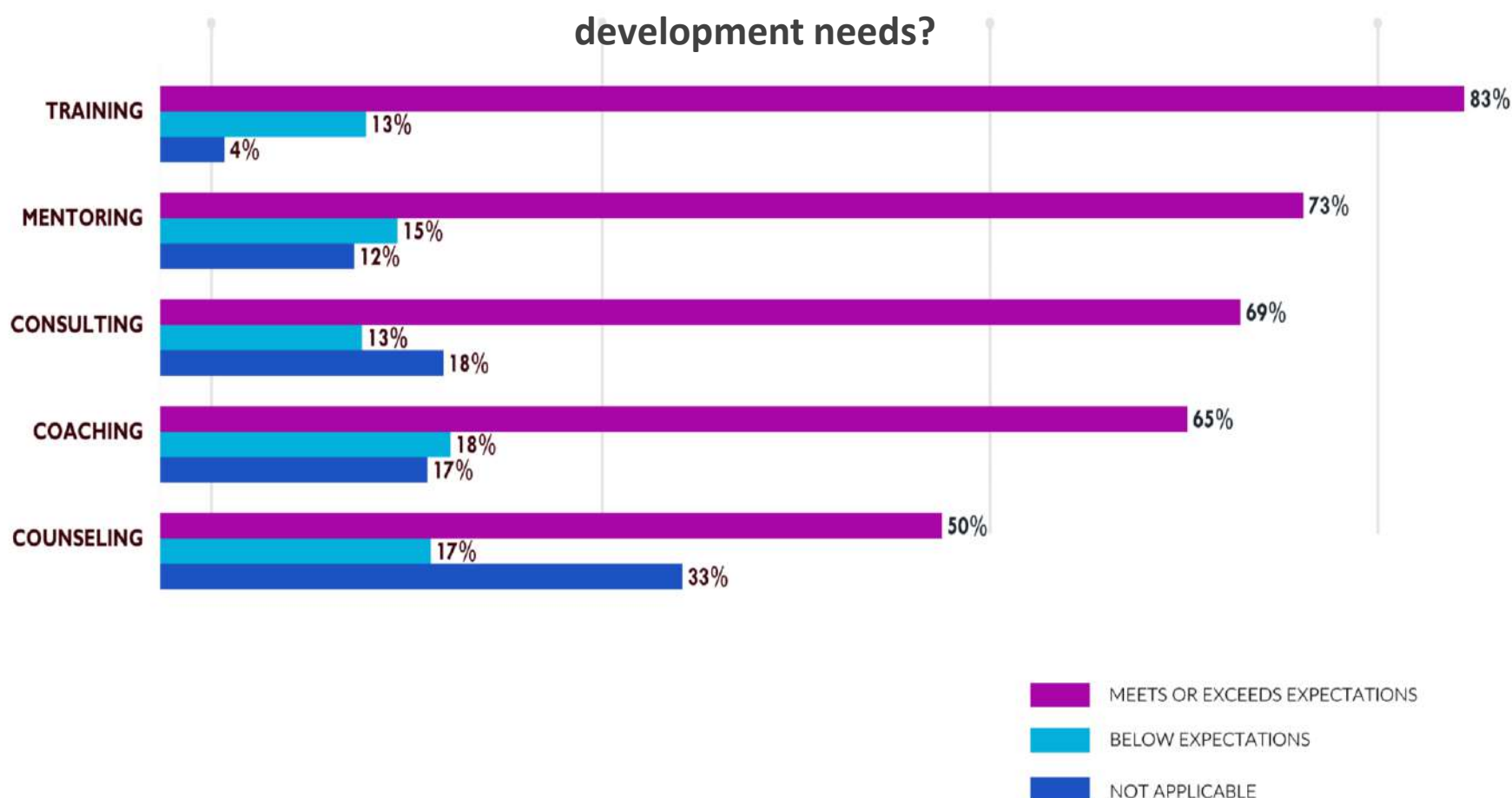


Although, mentoring stays constant (at 21%) across both years, it is worth noting that counseling shows a small increase (at 8%). This finding is in line with data collected on the impact of COVID-19 on OD, where respondents indicate an increase in the need for counseling services for improving employee wellbeing.

Current year: training is rated as the most impactful intervention for OD

We asked respondents to rate the impact of interventions on their OD needs, and training (83%) is reportedly the most impactful intervention across industries and countries represented in the sample.

Figure 9: How would you rate the impact of interventions on your organizational development needs?

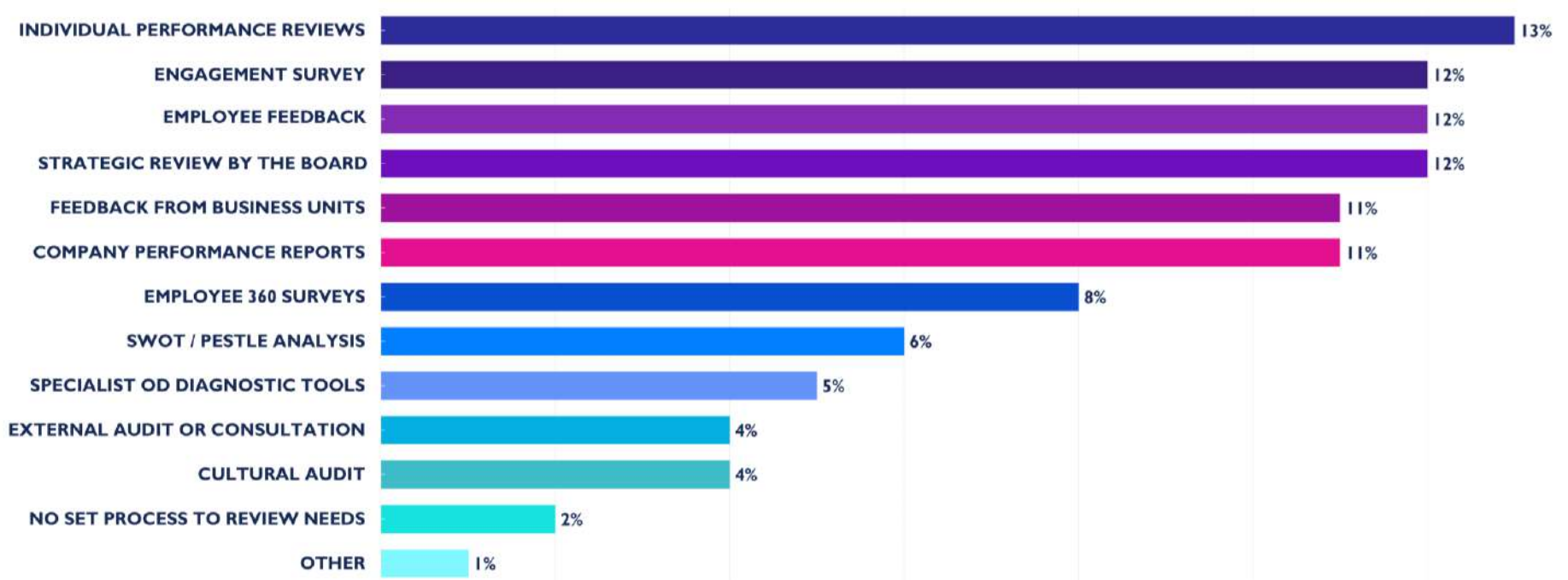


This finding is in line with recognized trends in the industry, as people professionals and business leaders tend to value training more (on-the-job training, online and digital learning courses) than coaching or mentoring interventions^{iv}. However, more than 60% of respondents indicate that coaching is a valuable intervention and half of respondents report the same for counseling.

Performance reviews, surveys and employee feedback are the most popular ways to identify OD needs

For organizations to be able to evolve and thrive in these challenging times, there is a need to identify current issues and opportunities. Several methods are available for organizations to identify OD needs, so that employees and teams are supported in achieving both individual and business goals.

Figure 10: Which of the following methods of identifying organizational development needs are used?



The data suggests that six diagnostic methods are particularly popular and carry almost equal weight with people professionals and business leaders.

Interventions for OD

Three popular methods used for identifying OD needs are individual performance reviews (13%), engagement surveys (12%), and employee feedback (12%). Evidence^v shows that these allow managers and their employees to monitor individual progress and highlight areas for growth. They also offer organizations an organic way of providing practical support and identifying learning or development needs for the employees.

Organizations can identify OD needs through engagement surveys by measuring blockers of engagement^v (i.e. poor policies, IT support or excessive workloads), drivers of engagement (i.e. career enhancing skills and performance motivating factors) as well as outcomes of engagement (i.e. pro-social behaviors, organizational loyalty and trust).

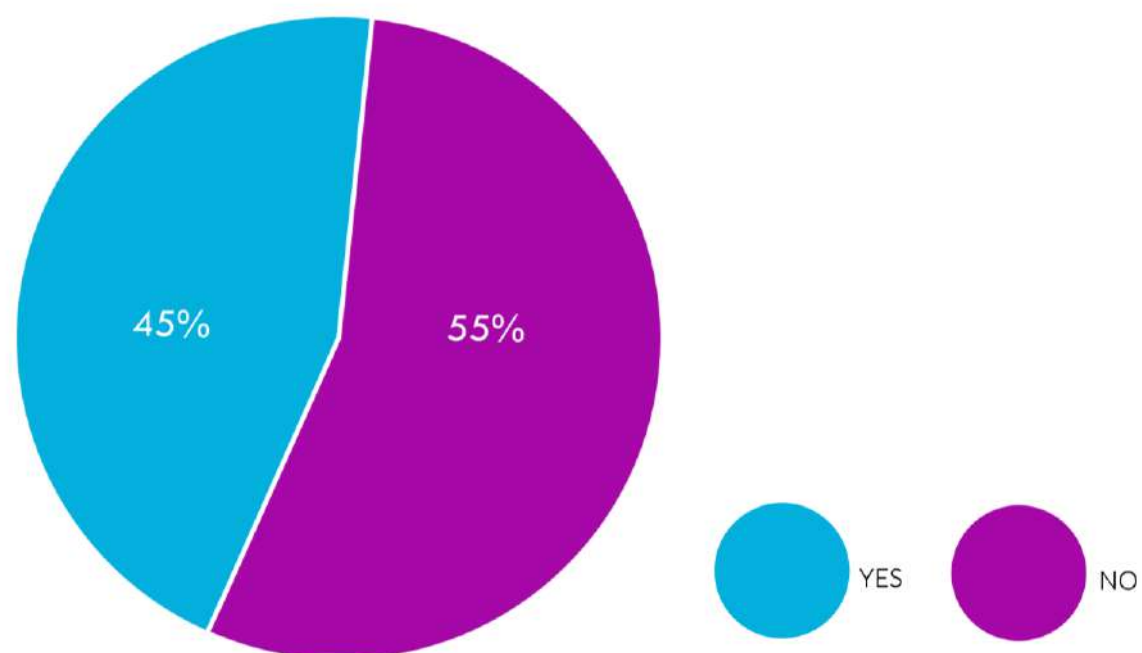


The inclusion of strategic review by the board (12%) and feedback from business units (11%) in the most popular diagnostic methods demonstrates an interest by respondents to consider a top-down approach in identifying key issues and opportunities.

Only 45% of organizations measure return on investment (ROI) of OD interventions

We asked respondents if they measure return on investment for OD interventions, and evidence supports the notion that a majority do not measure the impact of OD interventions on business performance. This is also detailed in recent HR reports showing only a third of organizations systematically evaluating OD initiatives^{vi}.

Figure 11: Does your organization measure return on investment (ROI) for organizational development interventions?



We find that only 45% of organizations across the region measure OD interventions' return on investment. This percentage is even smaller in Singapore, where only 36% of respondents indicate that return on investment is measured by their organization.

Interventions for OD



The fact that many organizations do not measure return on investment, suggests a challenge and an untapped opportunity, for both internal and external OD providers in understanding the success, or lack off, of change initiatives.

This is further highlighted in a McKinsey report^{vii}, which shows that one of the key reasons that change initiatives fail is the lack of measurability. Being able to quantify the value of investment for a change initiative is important and there is great value in developing tools, systems and processes to measure the effectiveness of OD interventions. Further research and exploratory conversations are recommended with industry leaders and HR associations to better understand challenges and opportunities in measuring return on investment for OD interventions.

'It's encouraging to see a consideration of ROI metrics in this ICF Singapore research study. Many practitioners would prefer to avoid the topic, citing that clients don't typically ask for financial ROI metrics. But the reality is that organizations invest in OD initiatives for their most valuable asset [people], because they need to build capacity, increase efficiency, grow market share, reduce costs, improve conversion rates and innovate, to remain competitive. Service providers who are able to articulate and measure these important financial business metrics, will easily stand a cut-above the masses who are unable to demonstrate the value of their interventions.'



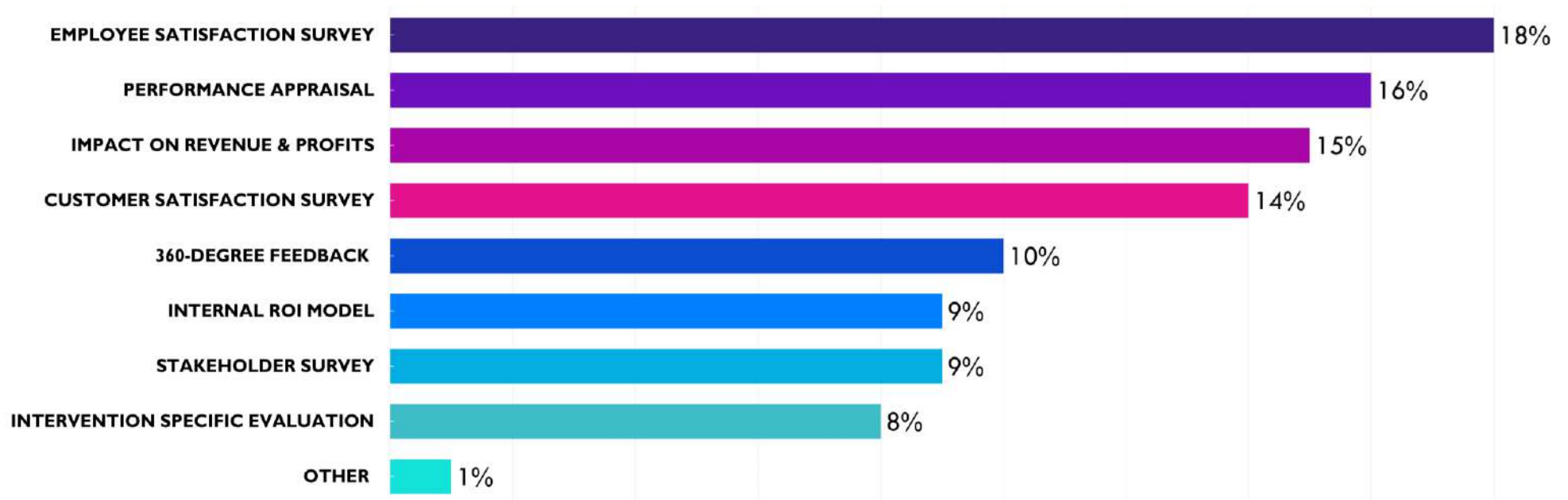
Lisa Ann Edwards

www.MyExcelia.com

Interventions for OD

For those who said yes (45% as shown in Figure 11), employee satisfaction surveys, performance appraisals, and impact on revenue and profits are the most preferred methods of measuring ROI.

Figure 12: Which of the following methods to measure ROI are used?



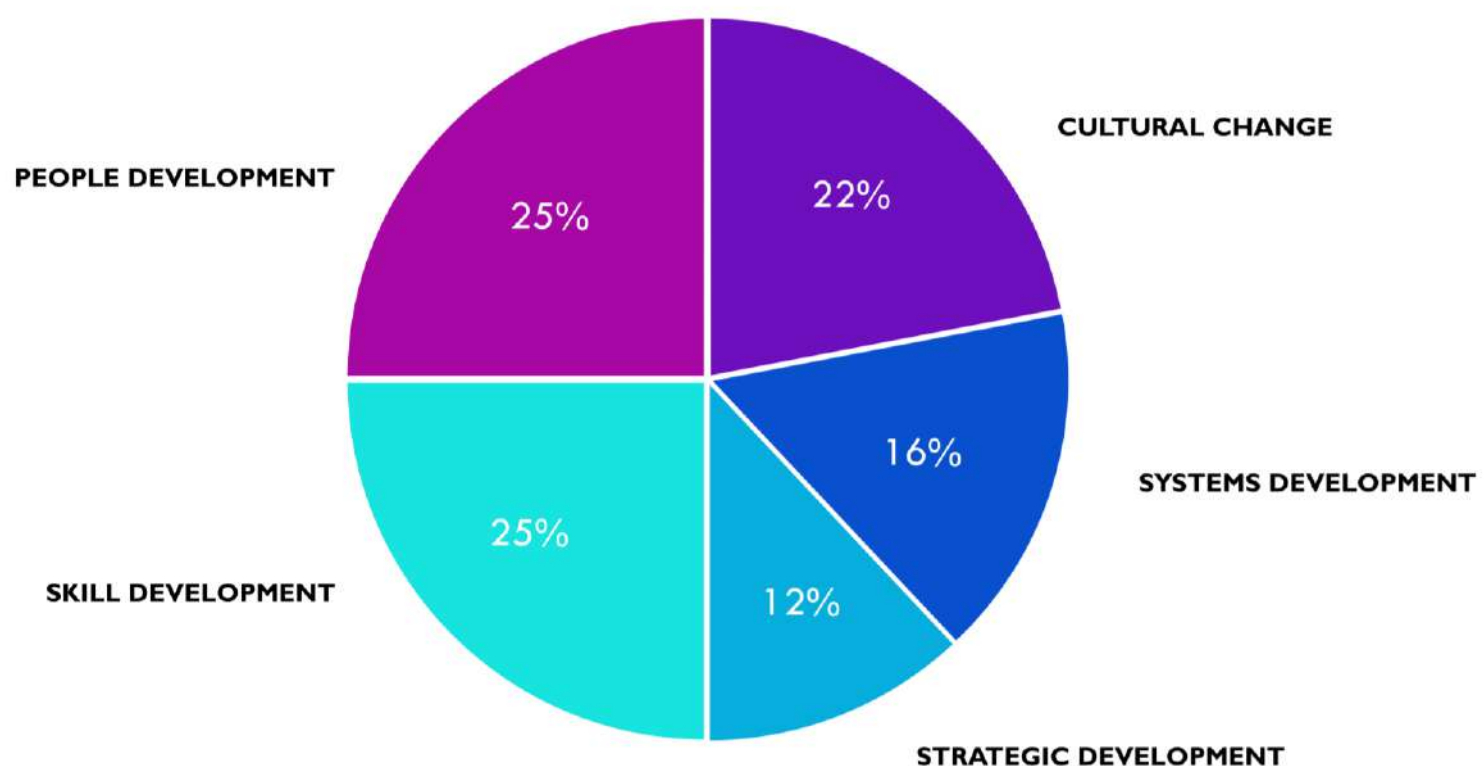
Even though lack of evaluation is a longstanding problem in OD practice^{viii} the spread of responses highlights the variety of ways to address the effectiveness of human process interventions like coaching, mentoring, training, consulting and counseling.

What would make it easier for organizations to measure ROI of OD interventions?

People, skills and cultural development are the key OD investments in the next year

We asked respondents about their OD needs in the next 12 months. 50% of respondents report that skills and people development are at the top of their agenda. Almost a quarter of respondents consider cultural change as the third most important organizational development need in the coming fiscal year.

Figure 13: What are your organizational development needs in the next 12 months?



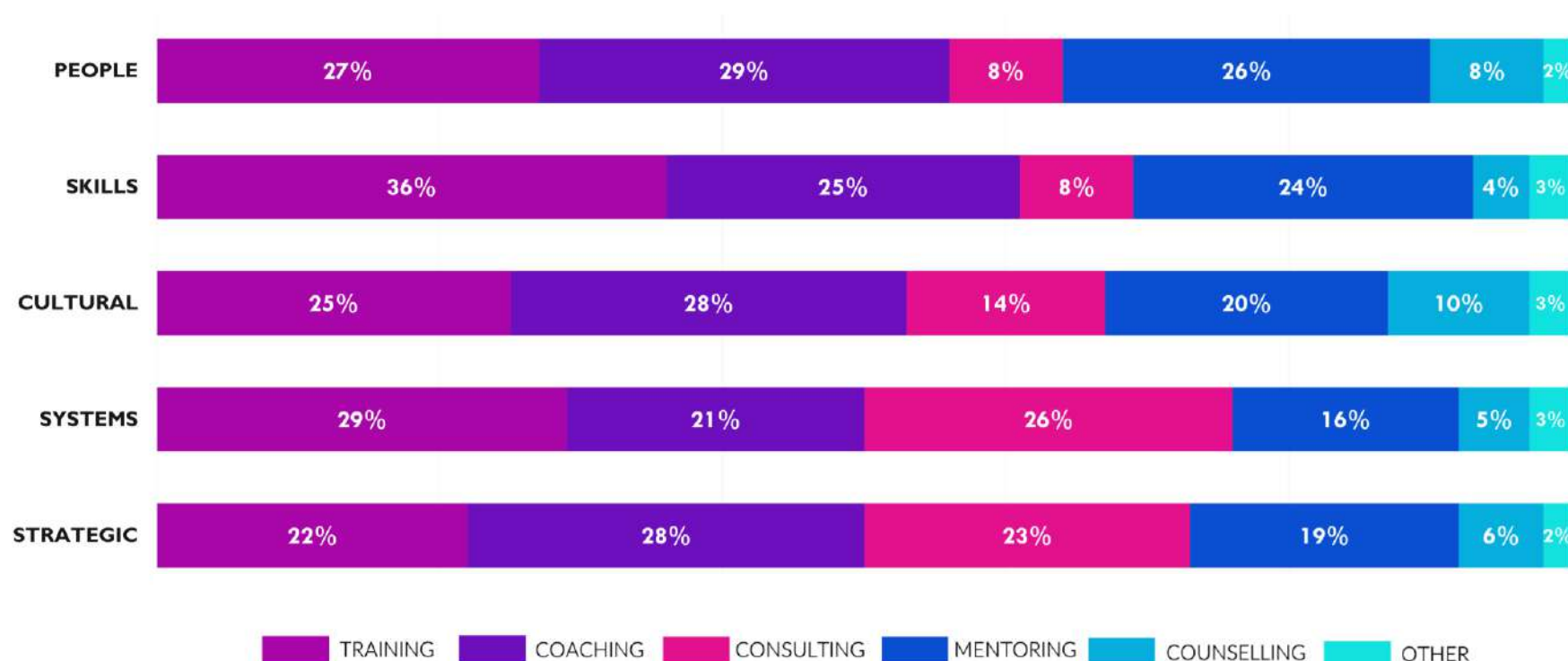
While the regional average stands at an even distribution of people and skills development (25% each), we notice some differences within countries. Singapore places slightly more emphasis on people development (26%) than skills (24%), whereas India reports a higher need for skills development (27%) over people (25%).

Interventions for OD

Respondents were also asked to indicate which intervention best meets each of the OD needs that they selected in the previous question. The aggregated results are shown in figure 14 below.

When it comes to people development, including leadership and succession planning as well as managing employee relations, one in two respondents suggest that coaching (29%) and training (27%) interventions best serve their needs. Evidence shows^{ix} that both have grown in popularity, with organizations using them to enhance soft skills, knowledge and performance of employees. More specifically, coaching is seen as the most suitable intervention for those based in Singapore (31%) and the Philippines (28%), and training for those based in India (29%).

Figure 14: What interventions best meet your organization's needs?



However, when we asked the survey respondents to think about skills development including the essential skills, competencies and capabilities of a successful and productive workforce, more than one in three said that training is the most suitable intervention. Training also emerged as the top intervention by over a third of respondents across India, Philippines and Singapore.

Interventions for OD

Training interventions have already been recognized as the most impactful and the data here further shows how established training is across countries, industries, people professionals and business leaders.

Coaching (28%) is also the most frequently cited intervention for cultural change purposes. In fact, over 30% of people professionals report using coaching interventions to align employee mindsets and perceptions to organizational change processes. Interestingly, evidence-based research^x conducted by ICF over a number of years has shown that coaching interventions are particularly helpful in achieving the goals of change management.

'Although training remains key in OD delivery, our key focus is on designing interventions so that employees can learn in the flow of work and that is where coaching and other systemic interventions come into play.'

'Practicing OD deep in the trenches of organizations, I see an emerging recognition of the value of coaching. What is needed is to weave the benefits of the coaching system beyond executive development. Practitioners could partner with organizations and communities to rethink coaching as a capability which can be scaled to stick.'

'Going forward, what we, OD professionals are seeing on the ground is an opportunity to create a coaching culture and democratize coaching. However, cost continues to play out as a challenge for many organizations.'



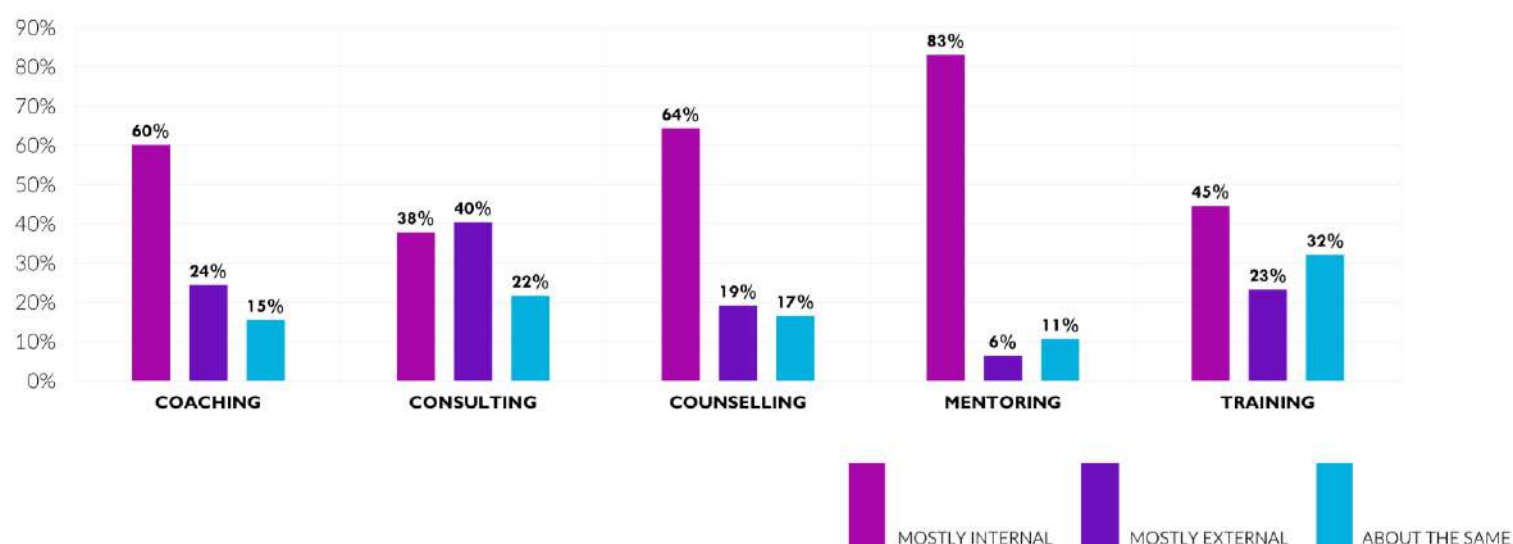
Salina Lim

Asia Transformation
and Organizational
Development Director
Intel

Organizations are seeking to develop more internal expertise

We asked respondents about the level of internal versus external delivery of OD interventions. Data indicates that one-to-one interventions like mentoring (83%), counseling (64%) and coaching (60%) are already delivered to a large extent internally (Figure 15). Further analysis revealed that at least one in two MNCs (54%), SMEs (65%) and start-ups (65%) already have coaching expertise in-house. This is however less the case for OD interventions like consulting (38%) and training (45%).

Figure 15: What is the scale of internal vs. external delivery for each intervention below?



People are the foundation of any successful OD initiative. As the founder of Emotional Inclusion, I host global C-suite leaders on my podcast who all align with the cause to invest in a trained professional within their organizations to develop and support their people at multiple levels, especially emotionally.

The moral compass of companies is to make sure that their bottom lines are met whilst fully embracing the humanity of the workforce they employ. A structured internal platform where a coach, a counselor or a therapist can be of service, is our corporate social responsibility.

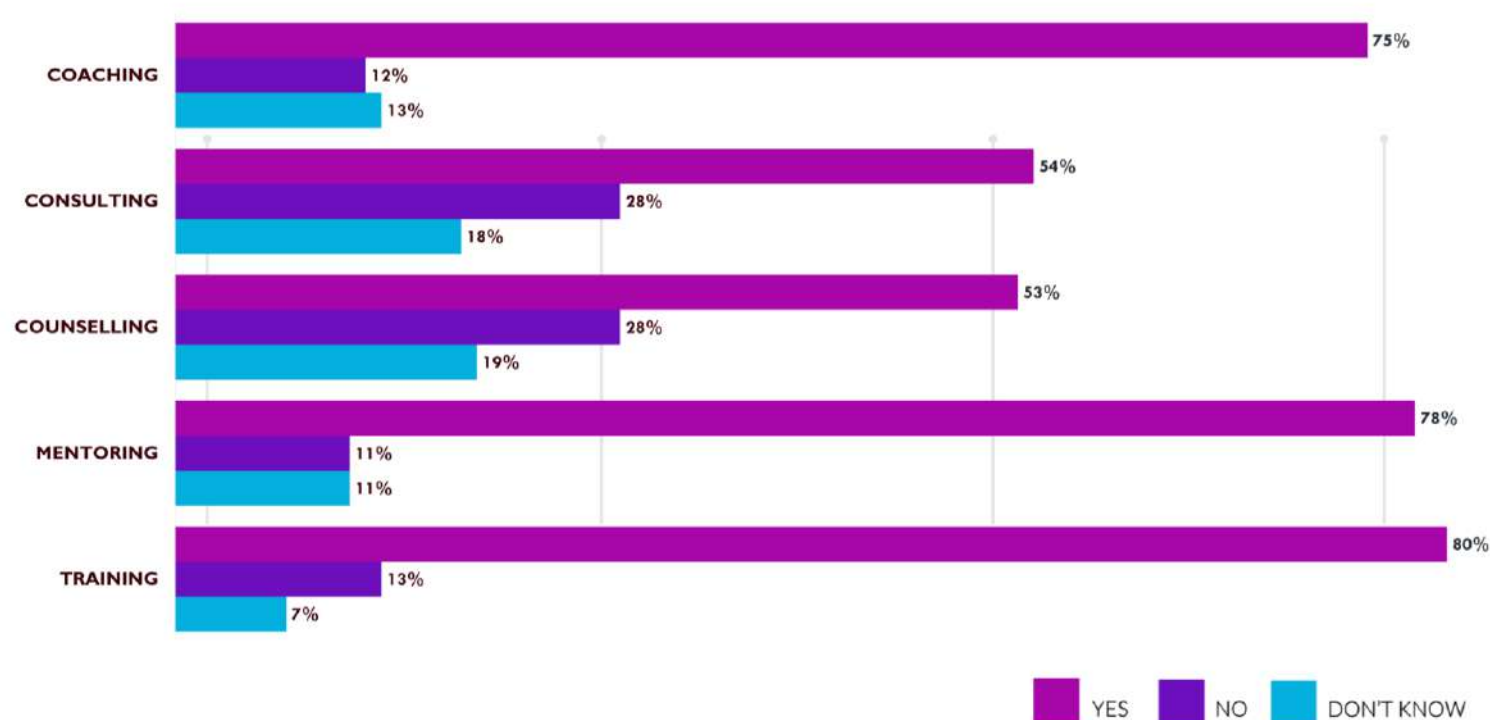


Mollie Jean De Dieu
General Manager
Singapore/ Malaysia
Longchamp Pte Ltd

Interventions for OD

When respondents were asked whether they expect internal delivery of OD interventions to be expanded, an overwhelming number gave a positive response. This is particularly interesting for interventions like coaching (75%), and counseling (53%) which are commonly delivered by external providers. Evidence from industry research has shown that coaching can be an effective approach to developing executives^{xi} and teams as recently detailed by the ICF Team Coaching Competencies^{xii}. Developing people and teams is an integral part of OD practices, and the new ICF Team Coaching Competencies detail how coaches can operate internally by engaging with multiple stakeholders, challenging teams' collective awareness and fostering team development to facilitate desired outcomes.

Figure 16: Are there plans to develop more internal expertise for these interventions?



As such our data appears to be aligned with an increasing expectation of line managers and HR professionals to demonstrate coaching capabilities^{ix}. This trend is more prominent in the Philippines where 80% of respondents report plans to increase delivery of coaching interventions internally. This is also the case for 70% of people professionals and 72% of business leaders across the region.

Interventions for OD

The extent of internal delivery (64%) of counseling interventions (Figure 15), coupled with an intention to increase this further (53%) was an unexpected finding (Figure 16).



Some differences between countries were noticeable, with only a third of respondents in Singapore (32%) supporting this notion. Whether organizations decide to integrate counseling services remains to be seen, however our data highlights an increased interest in the wellbeing of staff in the region (see Impact of COVID-19).

Considering recent figures^{xiii} have shown that only a third of managers are confident enough to have sensitive discussions around mental health, this is an interesting development.

'In a recent poll we did among executives, we found that 30% of senior executives have experienced depression, and 82% have found it difficult to talk about it in their companies. 2020 has brought even greater levels of isolation and stress due to the impact of COVID-19. However, we are noticing a positive trend with more leaders willing to discuss mental health challenges.'

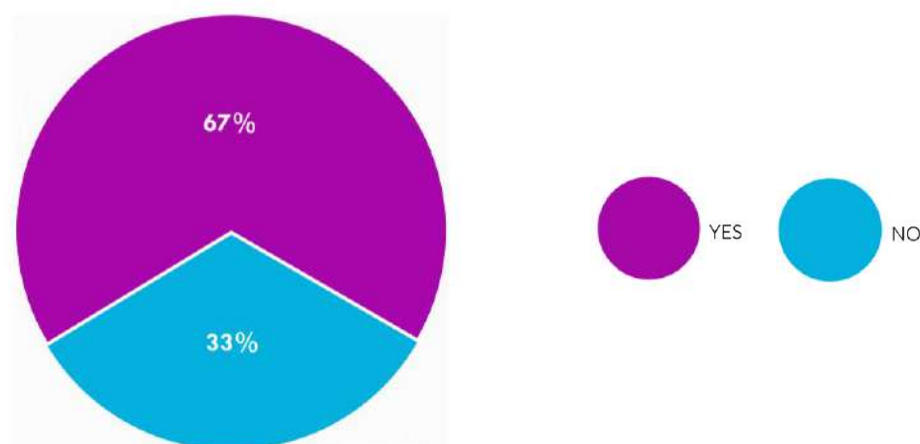
'We have seen a sharp rise in senior executives consulting counsellors and mental health therapists, and companies have a role to play in recognising the needs of their employees at multiple levels if we are to survive this challenge with agility.'



Nick Jonsson
MD and Founder
[EGN Singapore](#)

Expertise in multiple OD Interventions is preferred

Figure 17: Do you prefer a service provider to have expertise into multiple interventions?



Since organizations in the region still depend on external providers to deliver around a third of OD interventions, we asked respondents whether they would prefer a service provider to have expertise into multiple interventions.

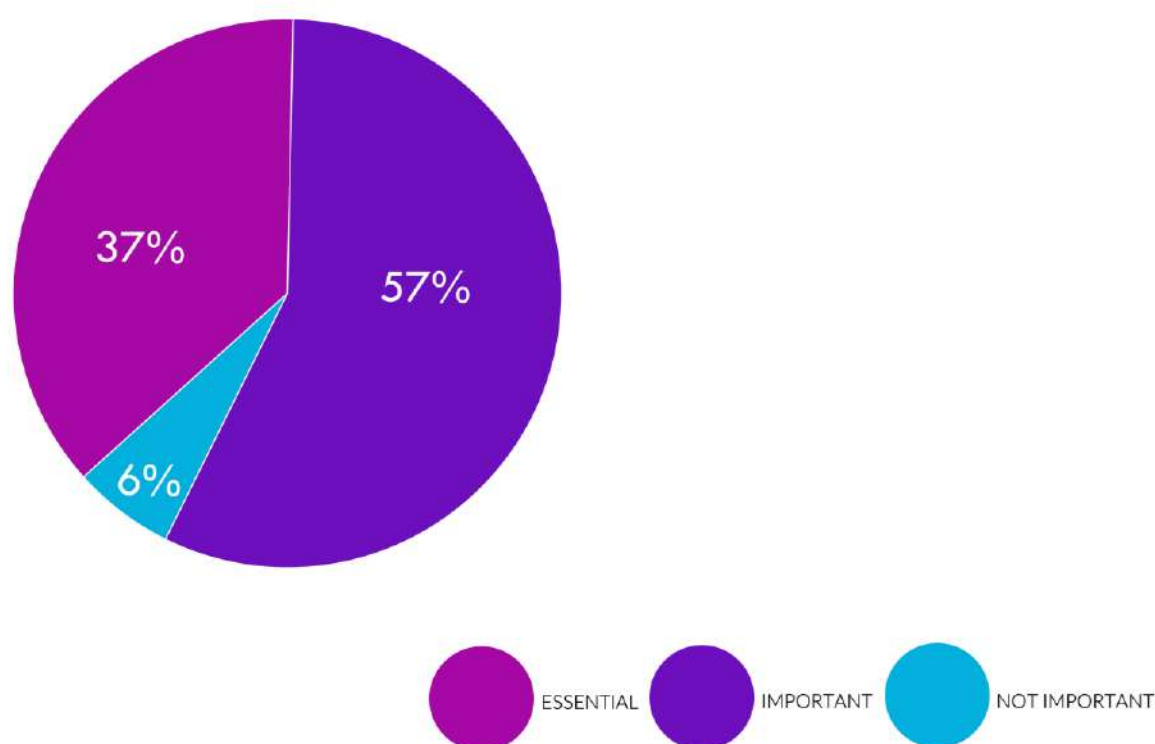
Of the 67% of respondents that reported that they prefer a service provider to have expertise in multiple interventions, more than half indicated the key reasons for this are: firstly, breadth of knowledge (21%), and secondly provision of customized solutions (38%). It appears that people professionals and business leaders value service providers' ability to identify business challenges and implement best results, along with a flexibility to work across domains and recommend best suited interventions.

The report findings suggest that most countries, industries and types of organizations consistently prefer external service providers to provide multiple OD interventions. This preference is even more noticeable in the Philippines (79%). This is also highlighted in recent studies^{xiv} showing that many external practitioners are already operating a multi-faceted approach.

SPOTLIGHT ON COACHING

Coaching credentials are considered essential

Figure 18: How do you rate the importance of a coaching credential from a professional body?



As the coaching profession continues to grow and evolve, people professionals and business leaders in the region are placing increasing value on coach training and credentialing.

94% respondents said that it is important or essential, for coaches to hold a credential from a professional body. More specifically in the Philippines one in two respondents consider a coaching qualification essential whereas just over a third of respondents share the same views in India (39%) and Singapore (31%).

This opinion is also supported by a recent global coaching study^{xv} where a large majority of managers and leaders express their preference for coaches who are certified or credentialed.

It pays to get credentialed

Respondents were asked to share what they invest in a one-to-one coaching session (on average). We used ICF’s three levels of credentials as reference for this question.

Figure 19: What do you invest in one-to-one coaching per session (on average) for the following levels of coaches?

ASSOCIATE CERTIFIED COACH (ACC)	US \$225
PROFESSIONAL CERTIFIED COACH (PCC)	US \$427
MASTER CERTIFIED COACH (MCC)	US \$657
NON CERTIFIED COACH	US \$52

Data shows that a commitment to professional training, development and credentialling has monetary value and financial benefit for coaches. The findings indicate that a Master Certified Coach (MCC) charges almost three times more, per session, than an Associate Certified Coach (ACC).

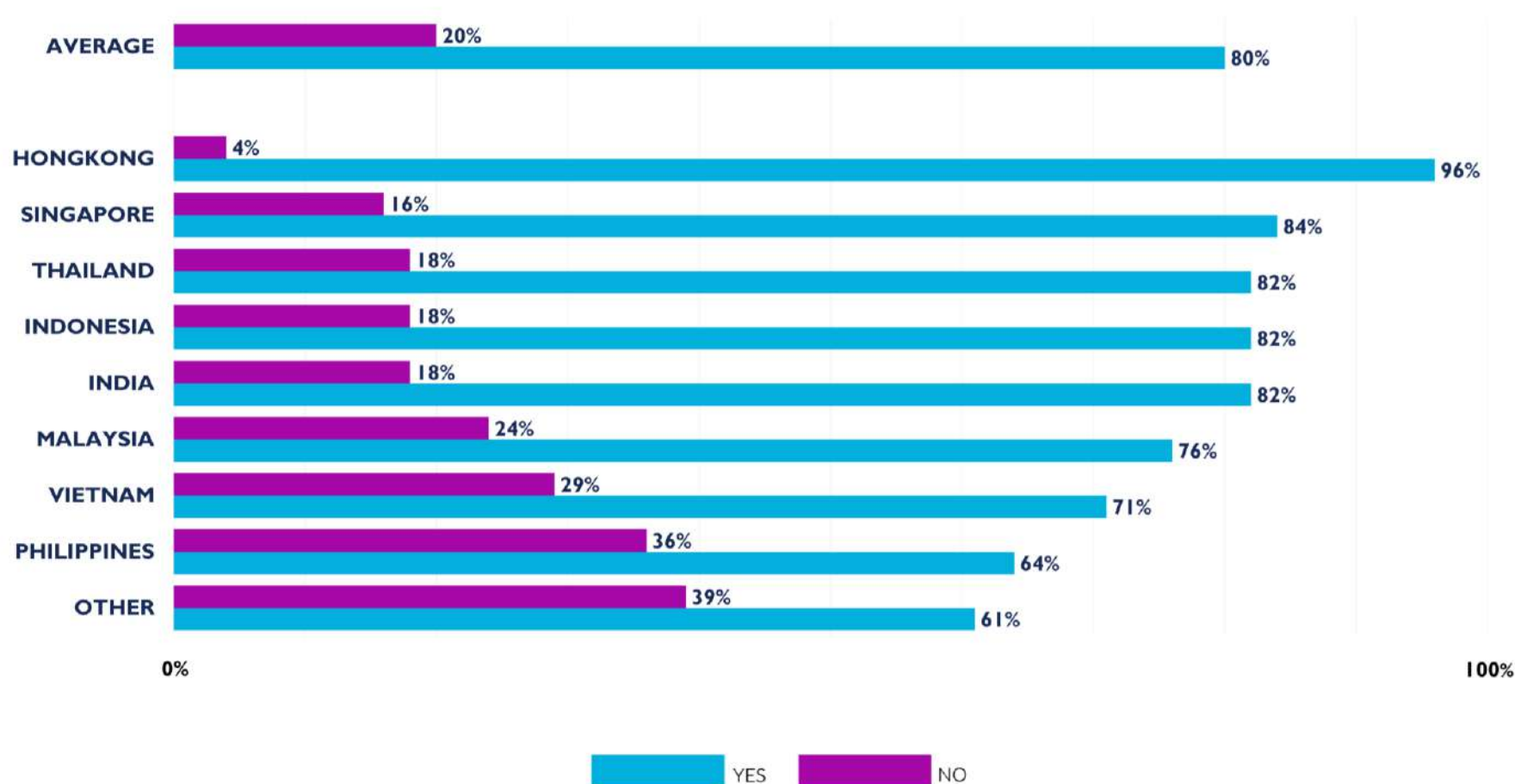
Interestingly the average investment on one-to-one coaching per session is consistent across industries and types of organization. Some differences between countries are observed as organizations in the Philippines invest around \$100 more per session (\$531 per session) for a Professional Certified Coach (PCC) than the regional average (\$427 per session). Also, in Singapore a Master certified Coach (MCC) charges 8.8% more (at \$715 per session) than the regional average (\$657 per session).

Spotlight on coaching

With the use of coaching expanding rapidly, the role of coaching bodies in setting high professional standards is amplified. There is great value in a professional coaching qualification that ensures compliance to a rigorous education, a set of practice requirements, and a code of ethics that protects and serves coaching clients.

In that respect, the International Coaching Federation (ICF) appears to be a visible and recognized body in the region by 80% of people professionals and business leaders, as shown below.

Figure 20: Have you heard of the International Coaching Federation (ICF)?

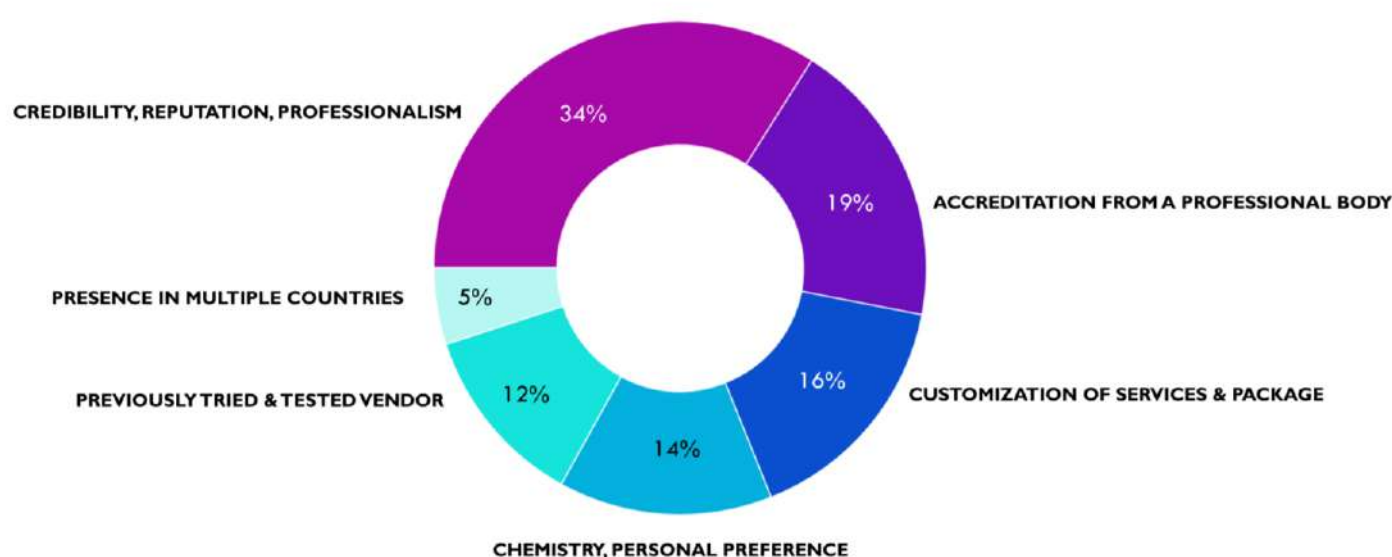


We do note that the role of ICF membership in distributing the survey may influence the extent of ICF's visibility in the region. However, an Asia Pacific Alliance of Coaches (2019) Study^{xvi} also presents ICF as the most popular credentialling body among professional coaches in the region.

Credibility, reputation and professionalism are key drivers for choosing an external coach

While evidence shows that credentialed coaches are sought after by organizations in the region (as seen above), a third of the respondents said that external coaches' credibility, reputation and professionalism are in fact the key drivers of the selection process. This correlates with findings from a previous ICF Global Report^{xvii}, highlighting the importance placed on referrals from trusted individuals when selecting external coaches.

Figure 21: What are your three main criteria for selecting external service provider(s) for coaching?



Role specific analysis:

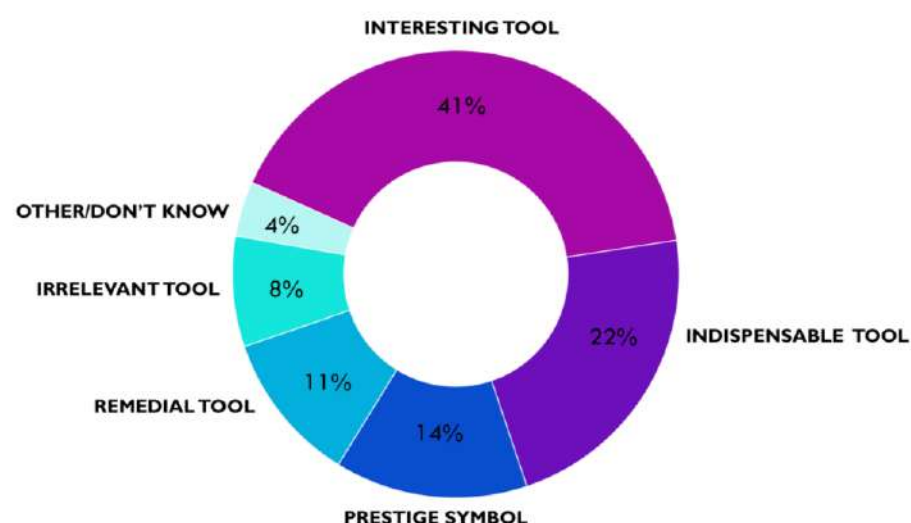
For business leaders, a coaching provider's ability to customize services (16%) appears as important as holding an accreditation from a professional body (19%). It should also be noted that entrepreneurs (19%) and respondents from SMEs (19%) across the region place higher value on chemistry (between a coach and a client) than the industry average (14%). As for Singapore based respondents, 20% of them indicate that chemistry is the second most important factor for selecting external coaching providers, after credibility, reputation and professionalism.

Over 75% of respondents hold a positive perception of coaching

Data shows that 77% of people professionals and business leaders hold a positive perception of coaching, where they perceive it either as a prestige symbol (14%), an indispensable tool (22%), or an interesting tool (41%). This is in line with previous studies that have shown negative perceptions of coaching to become less common over the past 10 years^{xviii}.

Exploring what will convert an interest in working with a coach into a coaching contract presents an opportunity for significant growth for the profession. This is especially relevant since our data shows consistency across countries, industries, types of organizations and decision makers.

Figure 22: What are the perceptions of coaching within your organisation?



While only 11% of respondents share that they see coaching as a remedial tool, it is worth exploring what needs to happen to change this perception.

'The continued surge of coaching as a modality is great news, for it effectively helps organizations unleash the collective intelligence and agility to thrive in a VUCA environment. The depth and breadth of this unprecedented survey gives precious insights to OD specialists, HR leaders and coaches as they reflect on how to make the 'future of work' more healthy and productive.'



Jean-Francois Cousin
Speaker, Author, MCC Coach
Chairman of
ICF Global Board 2019

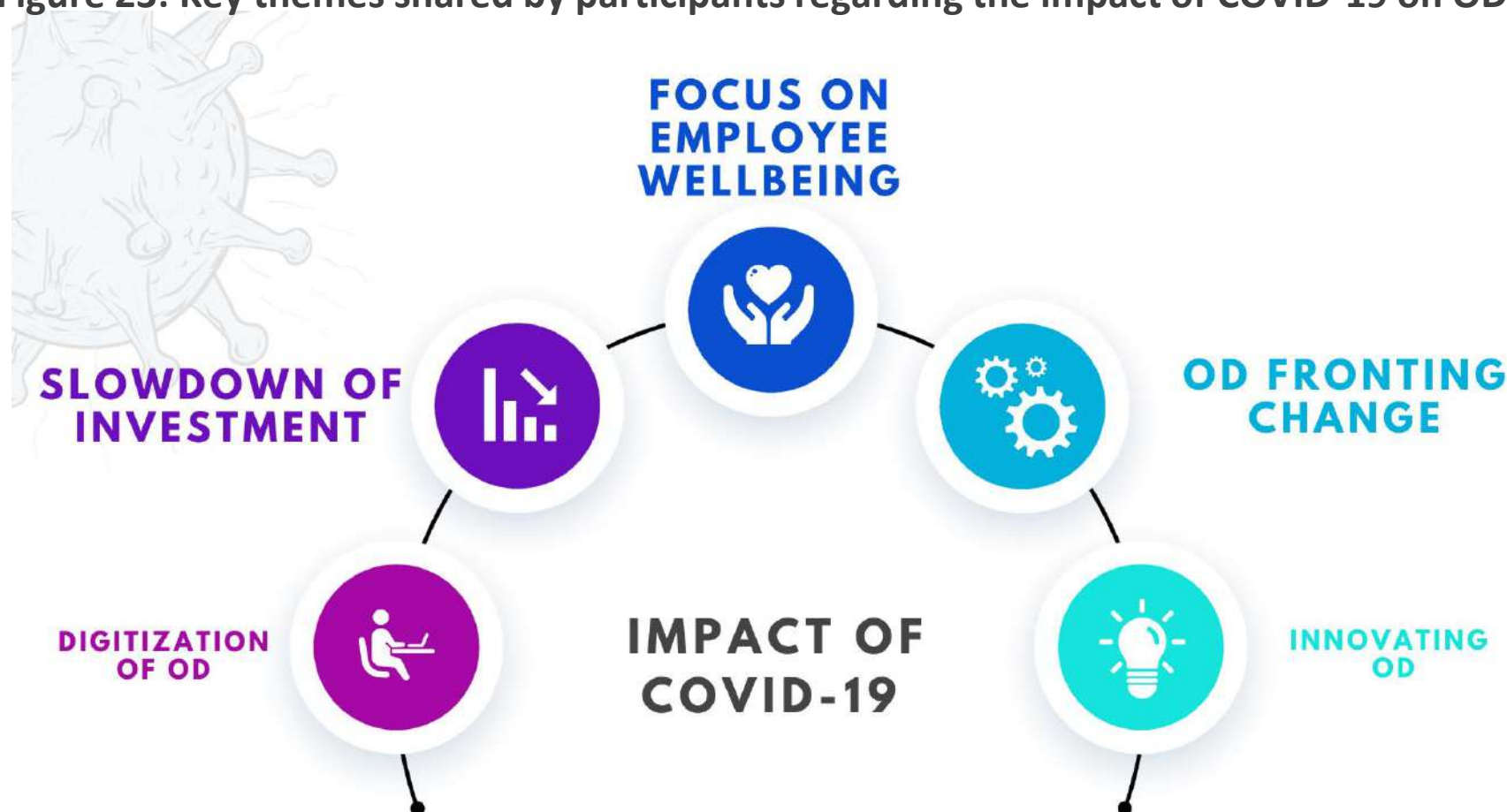
IMPACT OF COVID-19

Impact of COVID-19

Since the start of the coronavirus (COVID-19) pandemic, organizations globally have experienced immense change. The pandemic has presented immediate challenges, impacting millions of working lives around the world. For this reason, we asked survey respondents an open-ended question on how COVID-19 is likely to impact OD investment in their organizations.

We used thematic analysis^{xix} to analyze 539 responses, and three major categories emerged: positive responses, neutral responses and negative responses. It is encouraging to see that 53% of people professionals and business leaders reported a positive impact of COVID-19 on OD, 29% a negative impact and 18% remained neutral (see Appendix). A further, five key themes were distilled from the responses (see Appendix) as illustrated below

Figure 23: Key themes shared by participants regarding the impact of COVID-19 on OD



How is COVID-19 impacting organizations in engaging external service providers for OD?

Slowdown of investment

Insecurity in the first months of the pandemic remained high with much emphasis placed on dealing with immediate loss of revenue for many organizations. Respondents stated they were already experiencing budget cuts and delays of OD initiatives, whilst organizations were re-evaluating their priorities. It appears

that for a number of employers in the region financial stability will become a key requirement, before any investment in OD interventions can resume.

'Lower emphasis on OD and more focus on growing the business impacted by slowdown due to COVID-19.'

**- HR Business Partner,
Consumer Goods, Philippines**

'Will slow down the pace of OD due to safe management measures and cost.'

- Head of Human Resource, Logistics and Supply Chain, Singapore

Digitization of OD

'Many L&D interventions have gone virtual and online.'

**- Head of
Learning and
Organisational
Development,
Media and
Advertising,
Singapore**

One of the most immediate results of the pandemic was the rapid increase of remote work. Lockdowns across the region meant that most employees who were not previously given the option, were now working at home. Although some respondents focused more on advantages, and others on challenges of remote work, they all seem to envision a flexible working model in the future^{xx}. Key areas of interest for respondents include the facilitation of communication and collaboration of virtual teams, as well as the online delivery of many OD interventions like coaching, training and consulting.

Focus on employee wellbeing

Studies^{xxi} conducted during the early days of the pandemic suggest that employees were already reporting a range of mental health issues. Respondents indicated that employees were likely to experience reduced motivation, work related anxiety and



isolation as a result of COVID-19. This perhaps explains why a long-term response to employees' physical and mental wellbeing is supported^{xx}. The most frequently cited suggestions involve increasing counseling, coaching and mentoring services, as well as building organizational resilience.

'We might need more counseling for employees.'

- Managing Director, Education, India

'As an ICF accredited coach and the COO I see my role as a coach taking precedence. To ensure operational efficiencies and a happy organization it becomes important to nurture, enable, protect and develop our team to be strong emotionally, mentally and financially. Coaching helps them immensely.'

- Chief Operating Officer, Consulting Services Corporate Sector, Philippines

Innovating OD

Recent studies^{xxii} show that to stay relevant in today's dynamic and demanding environment, organizations must reinvent, redesign and recompose themselves with a 'human focus' on three fronts: the workforce, the organization, and HR.

The rise of flexible working has for many organizations accelerated the need for change and innovation. Respondents highlighted that organizations are actively investing in technology to facilitate remote working, as well as virtual engagement of employees via OD initiatives. More interestingly respondents referred to a 'paradigm shift', and a 'mindset change' that is transforming the readiness of employees and leaders to embrace new ways of working.

'Rethinking on moving from high-touch to low-touch business strategy.'

- Senior HRBP, Banking and Finance, Malaysia

'We are taking this COVID-19 situation as an opportunity to review our portfolio and define a sustainable business model. We are fortunate that only few businesses within the organization have been impacted by COVID-19.'

- Head of Human Resources, Media and Advertising, Singapore

'The focus of OD will shift significantly. It will be on areas like agility, innovation and digital competencies.'

- Head of Learning and Organisational Development, India

OD fronting change



Responses to the open question on COVID-19 indicate that OD is at the forefront in helping organizations manage the challenges of embracing the 'new normal'. One of the key reference respondents made was the digitalization of OD interventions (online learning, virtual coaching etc.) to better serve the needs of a remote workforce in the region.

Many also shared that they plan to invest in people and skills development to cope with emerging business and operational priorities. Considering that both people professionals and business leaders are asked to do more with less under the current conditions, cost efficiency will continue to impact OD investment in the region.

'OD will play a big role in helping and guiding the leaders adapt to the new environment.'

- HR and Learning Manager, Conservation Industry, Hong Kong

'The organization has to build a new strategy.'

- Head of Department, Hospitality, Indonesia

CONCLUSION

Conclusion

OD processes are essential in helping organizations navigate a constantly changing environment, where agility and adaptability are expected. This study set out to understand the perceptions, applications and trends of five human process OD interventions across organizations in South East Asia, India and Hong Kong

It is interesting to see that OD is at the forefront of change. People professionals and business leaders are adopting a more pragmatic approach by embracing innovation, digitizing practices, and improving employee wellbeing. Awareness of mental health issues and the rise in use of counseling services is gaining momentum in organizations across the region.



The extent of OD interventions being delivered internally, along with organizations' intentions to develop this further is an unexpected finding. The extent to which one-to-one interventions, like coaching and counseling, are already being delivered partly internally requires further exploration. Future studies can investigate the reasons driving these decisions, assess the risks and benefits of developing internal expertise, and explore the long-term impact of this trend.

Conclusion

At the same time, external providers that offer expertise in multiple OD interventions are sought after by a large number of organizations in the region. Organizations are looking for experts who can identify their needs, are able to adapt interventions, deliver customized solutions, and achieve better results. Interestingly this is also reflected in marketplace, where providers of OD solutions are reportedly expanding their portfolio to include multi-disciplinary packages.

People, skills and cultural development are driving organizations' OD agenda in the region. While training remains central in OD practices, priorities seem to be shifting with emphasis placed on one-to-one interventions that help the workforce grow and develop. Coaching is being recognized as a particularly effective tool in leadership development, succession planning and change management. Our findings suggest an upward trend for coaching across countries, industries and various types of organizations. However, it requires further exploration whether it is coaching skills that are being integrated in OD practices, rather than coaching interventions delivered by external providers.

As these developments unfold, we are mindful that a majority of organizations do not systematically evaluate OD interventions. This has been a longstanding problem in OD practice, and is further highlighted in coaching literature. Being able to quantify the value of OD interventions offers confidence and guarantees investment by people professionals and business decision makers alike. However, it does come with many challenges, like agreeing on clear success criteria and linking impact of individual performance results, to the wider business performance. Measurement of OD interventions is undoubtedly a process that requires time and resources by industry leaders and HR professionals, but one we strongly believe is worth investing in.

Conclusion

As we put the spotlight on coaching, it becomes clear that as professional coaches, we are part of a maturing industry. A shift of focus is evident, from demonstrating the value of coaching to embedding coaching in organizational culture. However, there is still some way to go in convincing key stakeholders of how indispensable coaching can be as a tool, even though some countries and organizations are taking the lead in the region. We can also say with confidence that coaching credentials, and a commitment to continuous professional development has monetary value and benefit for coaches in the region. Though this is a known fact, it is still an important reminder supported by data.

Other areas of interest for coaches include organizations' interest in customizing services, and internalizing of coaching expertise. Whether these developments are a direct response to the COVID-19 pandemic remains to be determined, they are however topical discussion points for professional coaching bodies and their members in identifying ways to adapt and succeed to changing market demands.

ACKNOWLEDGEMENTS

ICF Singapore board

We thank all the past and current ICF Singapore Executive Board members over the past 4 years who have believed in the project, supported it from inception, and encouraged us to be our best.

Our project team

We are deeply grateful for our team of volunteers for their support to develop this project, across multiple countries, over a number of years, with hundreds of hours of time dedicated to make this a success. Listed below are the key people and roles for the project:



Avni Martin (PCC) is our Director of Research, who initiated, directed, managed the project, and co-authored the report with over 500 hours dedicated in bring communities together across the region. Avni is the founder of an ICF Accredited Coach Training Program (ACTP) school, corporate trainer, mentor to coaches and Inner Child Integration Therapist (ICIT). Avni works with coaches, teams and organisations to change mindsets, cultures and behaviours.



Maria Tzortzaki (ACC) is our Research Consultant responsible for data analysis and co-authoring the report. As a coach, she has spent over 10 years delivering career management, and maternity transition coaching. With MSc degrees in Organisational Psychology and Career Management and Coaching, Maria has taken on lecturing roles in Singapore and the UK. Her current research projects explore the intersection between coaching and psychological resilience.

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Nandini Das Ghoshal is our Research Consultant, co-designer of survey design and data analyser. With 20 years' experience as a business head, research consultant and learning professional, Nandini creates bespoke learning programmes, consults on leadership, inner transition, culture and career. She is the co-founder of a women-centric public Coaching Programme called The Story of Me and incorporates Neurobehavioral Modelling in her practice.



Tanya Sarin (ACC) is our Research Ambassador responsible for communications and marketing. An ICF credentialed coach based in Singapore, she specializes in career coaching and goal setting for students, young professionals looking for career transitions and women returning to work from a break. She has a strong background as an educator, having worked with large scale non-profits and starting her own education venture.



Deepak Gulati (ACC) is our Research Ambassador responsible for creating all graphs, charts and infographics. Having left his 17 years' career with Emirates Airlines, Deepak is soon to be certified as a Gallup Strengths Coach. He's also a certified NLP practitioner, Design Thinking consultant, speaker by passion and a student of psychology. Deepak delivers individual and group coaching to enhance confidence, strengths and communication skills.

Acknowledgements



Anne Phey (ACC) is our Research Ambassador responsible for designing and reviewing the report layout and presentation. Founder of The Conscious Flow, Anne offers business consulting, leadership coaching, mindfulness and training to corporates and individuals. She has 20+ years' experience as an entrepreneur and as sales and marketing director with global MNCs IBM, MTV and Bates across Asia Pacific. Anne holds a MBA (Change Management) and MA.



Chhaya Dias (ACC) is our Research Ambassador responsible for monitoring and capturing key KPIs of the project across the region and achieving around 51000 touchpoints. Chhaya is a life coach, an EQ and NLP practitioner. She specialises in change, stress management, shifting priorities and strengthening relationships. She has M.Phil, MA Psychology and has worked internationally as a counsellor, teacher and facilitator.

ICF members and industry professionals

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ENDNOTES AND APPENDIX

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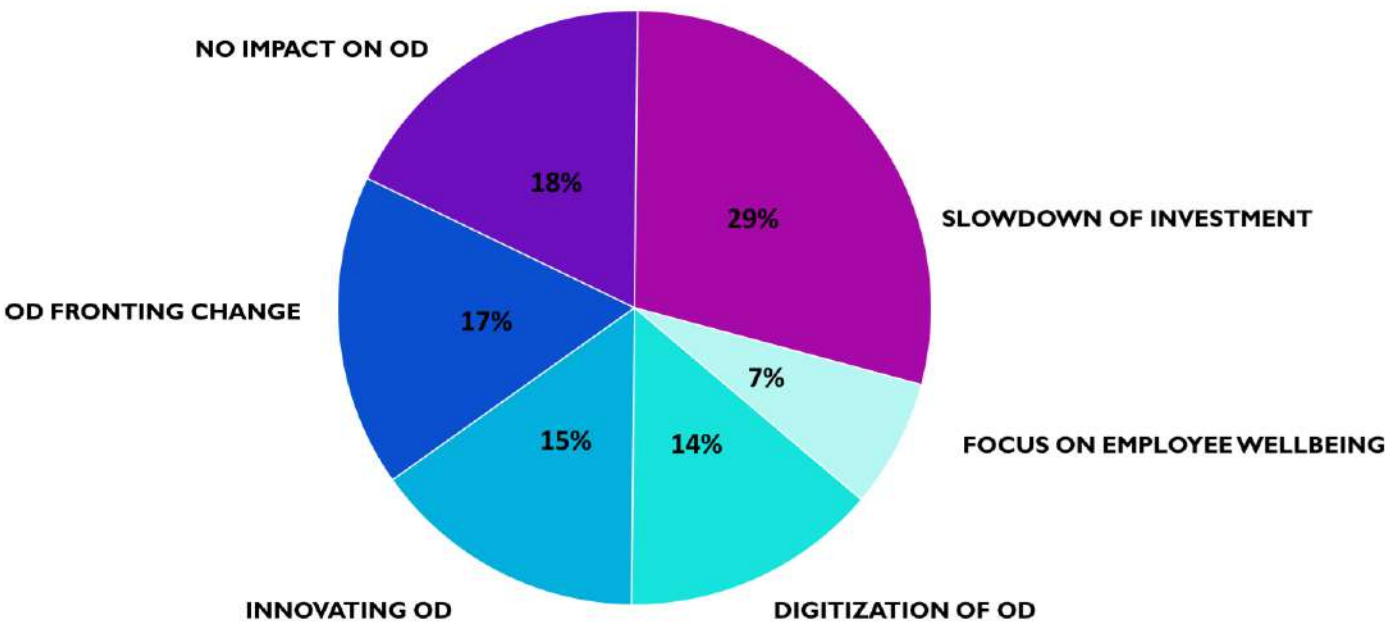
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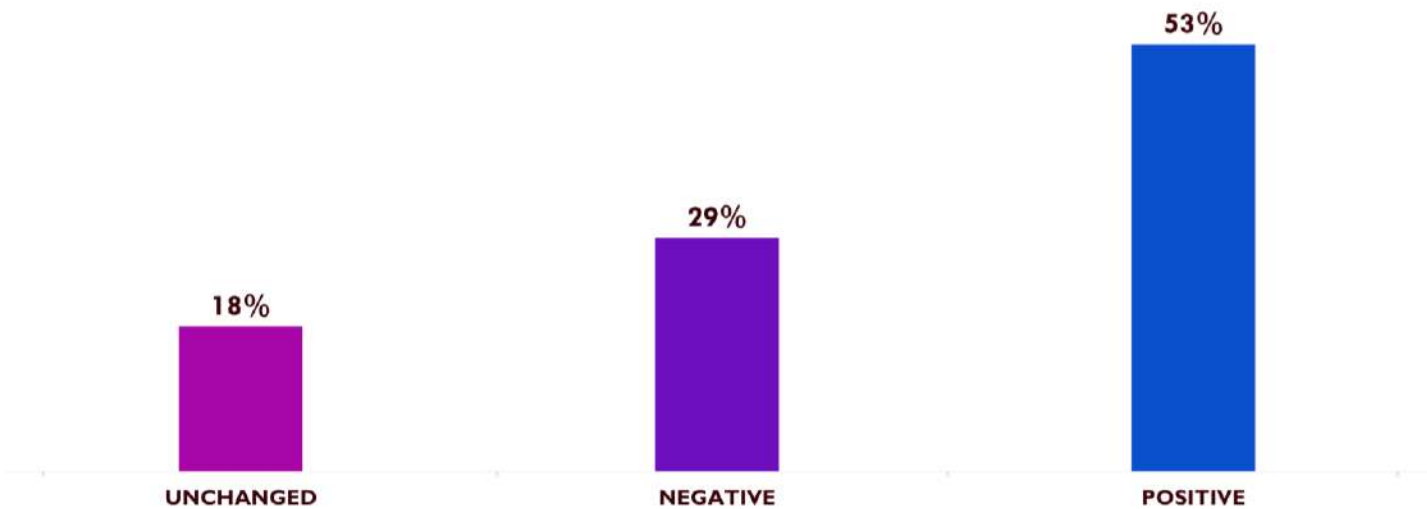
Industries specified as ‘Other’ in type of industry

Aerospace & Aviation	Healthcare
Automotive	L&D, OD, Coaching & Training
Change Management Consultancy	Legal
Conservation	MICE & Events
Construction, Leasing and Property	Pharmaceutical
Design and Engineering	Property Development
Engineering & Capital Goods	Retail & Direct Selling
Financial Services	Social, Non Profits and NGOs
Forest product	Sports
Gaming and Entertainment	Trading & Investment

Thematic analysis data on COVID-19 question



How is COVID-19 likely to impact organizational development in your organisation?



THANK YOU



Version: 1.1