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Learning Area 1: Introduction (60 credits)

Learning Area 1: Research, design and evaluate coaching effectiveness within an organization through the use of coaching principles.

This learning area aims to showcase my experiential learning through a critical reflection and analysis of my professional and personal experiences, contextualized within four core coaching principles, to substantiate my claim for credit. Each learning outcome will address a specific coaching principle, illustrating its application and impact within an organizational context.

Learning Outcomes

1. Research and evaluate a methodology that supports the coaching principle that coaching interventions can be measured.
 - Principle: Coaching interventions can be measured
2. Design and develop a bespoke coaching evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the customized needs of an organization.
 - Principle: Coaching effectiveness methodology can be adapted to organizations
3. Critically evaluate and quantify the effectiveness of coaching interventions within an organization based on the principle that coaching programs can produce quantifiable outcomes.
 - Principle: Coaching interventions produce a quantifiable return on investment
4. Critically review and apply the use of the coach-coachee relationship and boundaries as coaching principles to support the development of people within an organization.
 - Principle: Coaching relationship and boundaries are critical

The first three learning outcomes will explore the application of these coaching principles within organizations external to Learn², that engaged my coaching services. In contrast, the fourth learning outcome will examine the coaching relationship and boundary principle within an internal organizational context.

In my coaching practice, I have observed firsthand the profound impact that effective coaching can have on both individual and organizational performance. This inspired me to focus my claim for credit in this initial learning area. As detailed in my Curriculum Vitae (CV), my journey began at the age of 15, coaching a basketball team, which, although rooted in sport, planted the seed for my evolution into business coaching. This early experience laid the foundation for my progression through various executive roles, where I applied and witnessed the transformative power of coaching in the business world. By delving into this topic, I aim to integrate my practical experience with academic rigor to develop innovative coaching approaches that enhance leadership and performance within organizations. This learning area not only solidified my understanding but also provided evidence-based practices for maximizing coaching effectiveness.

As referenced in my CV and my job description with Learn², the external organization referenced above was its premiere client (Bell). In 2021, I was asked by that client (Bell) to research, develop and execute a methodology that could measure the effectiveness of its flagship leadership development program. Its goal was to measure, in quantifiable terms, the return on investment (ROI) of, what was referred to as, the Foundations programs and how the ROI would be impacted with the addition of coaching interventions. This initiative was referred to as the ROI pilot.

For additional context, under the auspices of the Foundations programs, existed specific context for each stream or target participant for the premiere client. Professional Foundations programs targeted leadership development for subject matter experts while Leadership Foundations programs targeted leadership development for people leaders who led teams. Within both the Professional and Leadership Foundations programs were several tiers. There were two tiers for professionals, CP2 and CP3, and three tiers for people leaders, CP2, CP3 and CP4. CP2s were considered managers, CP3 senior managers, and CP4 directors. For each of the five streams of employees, CP2 professionals, CP3 professionals, CP2 people leaders, CP3 people leader and CP4 people leader, there was overlapping and unique content. Since the premiere client was national in scope and headquartered in Quebec, all programs were offered in both official languages, being English and French. The population of CP4 people leaders was too small to meet the minimum enrolment threshold. Therefore, participants from nine programs (CP2 professional English and French, CP3 professional English and French, CP2 people leader

English and French, CP3 people leader English and French and CP4 leader English) were included in the ROI pilot.

As the primary point of contact for that client (Bell), my role was to lead the ROI pilot program for Learn². Because of my coaching experience and training, I was looked upon as the subject matter expert who, in collaboration with the premiere client, would research, design, develop and implement a methodology to evaluate and measure the effectiveness of their coaching programs. For contextual purposes, the premiere client (Bell) is Canada's largest telecommunication company founded in 1880 with over 45,000 employees.

With respect to the fourth learning outcome which focused on the coach-coachee relationship and boundary as a coaching principle within an internal organization, my role at Learn² was to provide coaching services to its internal team members as well as to its external clients.

In developing my learning outcomes, I have chosen to use the Gibbs' Reflection Cycle (1988, p. 49-50) to critically reflect and analyze my professional and personal experience in order to inform my claim for credit.

Finally, in my reflective essay, I will undertake a comprehensive exploration of my learning styles, critically analyzing and synthesizing their impact on my professional development and effectiveness as a coach.

Learning Area 1: Research, design and evaluate coaching effectiveness within an organization through the use of coaching principles.

Learning Outcome 1:

Research and evaluate a methodology that supports the coaching principle that coaching interventions can be measured.

Principle: Coaching interventions are measurable

INTRODUCTION

To demonstrate the depth of experiential learning I acquired in researching and evaluating a methodology that supports the principle that coaching interventions can be measured, I will critically analyze my experience to substantiate my claim for credit.

I first learned about the principle that coaching interventions could be measured, in 2020 while pursuing my **Certified Business Coach™** (CBC™) designation from the Worldwide Association of Business Coaches (WABC), a professional coaching body. The **16-week** virtual coach training program, described in my CV was led by Dr Peggy Marshall at the Global Institute of Organizational Coaching (Global IOC). A 228-page **workbook** containing 16 modules highlighted the latest coaching research, theories and models, and was used by Dr Marshall as a framework during each of the **90-minute** weekly classes (2020) (refer to Curriculum Vitae for details) (Evidence - LA1LO1.1 Requirements of CBC Coach Training Program).

In **preparation** for each class, scientific peer-reviewed articles on the 16 weekly topics, such as coaching theories, neuroscience and coaching, team coaching and habits, served to **supplement** that week's discussion. At the conclusion of each module and as a requirement of program completion, I submitted a 400-word "think about" and 500-word **homework** assignment. Throughout the program, Dr Marshall encouraged us to engage in our learning by asking questions and being curious about the content discussed.

On **May 4, 2020**, during week 13 of the coach training program, the topic of organizational coaching cultures was presented and discussed (Evidence - LA1LO1.2 Organizational Coaching Cultures). It was then that I first acquired knowledge on measuring the return on investment (ROI) of coaching. In reflecting on that topic, I found it particularly illuminating

and engaging, especially Jack J. Phillips' article on "Measuring the ROI of a Coaching Intervention, Part 2" (2007), which detailed a case study on ROI at Nations Hotel Corporation. In reflecting on the knowledge I acquired during the module, I was pleased to have learned about the quantifiable data supporting the principle that coaching interventions can be measured.

In reflecting on the "think about" assignment for that module, I found it **perplexing** as the question pertained to the challenges of measuring ROI. I was curious about the rationale for focusing on the obstacles rather than the benefits of measuring ROI of coaching. In further examining my thoughts, I concluded that, as an advocate for measuring and demonstrating the quantitative value of coaching, I had **interpreted the question negatively** based on my perspective and beliefs. After having critically reflected and examined the reason behind my reaction, I concluded that the topic of demonstrating coaching effectiveness was of significant **importance and interest** to me for several reasons. Firstly, demonstrating ROI of coaching effectiveness aligned with my **values, beliefs** and commitment to **excellence**. Secondly, **quantifying my effectiveness** as a business coach was a way to distinguish myself from other coaches. Below I will further reflect on this conclusion. Thirdly, having a **Bachelor of Science degree** contributed to my preference for utilizing quantitative data to inform decision-making (refer to Reflective Essay for details). Lastly, my business experience, where I was responsible for allocating millions of dollars to support athletes in their preparation for the **Olympic Games**, underscored the value of measuring ROI of programs.

As mentioned in my curriculum vitae, the following year, in 2021, I began pursuing my next-level designation as a **Certified Master Business Coach™** (CMBC™) from the WABC. I undertook my master coach training program, once again, with Dr **Peggy Marshall** at the Global IOC. The program consisted of **20 weeks of virtual in-class** sessions, during which I acquired a deeper knowledge of the academic underpinning for measuring the effectiveness of coaching interventions. This understanding laid the groundwork for this learning outcome, which aims to research and evaluate a methodology that supports the coaching principle that coaching interventions can be measured (refer to Curriculum Vitae for details).

In preparation for each **two-hour** session, I read and reflected on two chapters from *The Sage Handbook of Coaching* (Bachkirova et al., 2017) which was replaced after approximately six weeks with *The Complete Handbook of Coaching* (Cox et al., 2018). These classes, **facilitated** by Dr Marshall, provided opportunities to ask questions, share perspectives, identify points of agreement or disagreement, and elaborate on how my learning influenced my coaching practice (Evidence – LA1LO1.3 Sample of Weekly Discussion Slides). Each week, Dr Marshall enhanced our knowledge by distributing peer-reviewed articles before or after each class tailored to the topic, our interests and ensuing discussions. I completed the program by submitting **three reflective assignments** totalling approximately 7,500 words and conducting a **research project** (refer to Learning Area 2 for details).

In reflecting on and analyzing this learning outcome, I examined both books that accompanied our classes and discovered that only the new textbook included a chapter on quantifying the effectiveness of coaching by McDowall and Lai (2018, p. 483) which was discussed during week 18's class on July 5, 2021. I was elated that the following content by Fillery-Travis and Cox (2018, p. 518) would provide quantitative outcomes of studies conducted in coaching. I was thrilled to learn that **Dr. Fillery-Travis** would be the guest speaker during the next class on July 12, 2021. In reflecting on my learning from the master-level program of study, I learned that these two classes, including the reading, reflection and discussion, provided me with the academic underpinning for this learning outcome: to research and develop a methodology that supports the coaching principle that coaching interventions can be measured.

PREMIERE CLIENT'S NEED FOR ROI OF FOUNDATIONS PROGRAMS

I will now critically analyze my professional and personal experiences in the context of working with the premiere client (Bell) to research and evaluate a methodology that quantifiably measures the effectiveness of coaching interventions, in order to inform my claim for credit.

On February 8, 2020, the premiere client communicated its desire to initiate an ROI pilot to measure the effectiveness of its flagship leadership development program, known as the Foundations programs (Evidence - LA1LO1.4 Bell Master notes 20200208 Need for ROI) (refer to Learning Area 1, Introduction for details). However, a few weeks later, due to

COVID-19 pandemic, this **ROI pilot**- described in detail in the introduction to this learning outcome-was put on hold. It was not until July 5, 2021, 17 months later, that my strategic point of contact (AP) for the premiere client announced that the **ROI pilot** would be implemented.

In critically reflecting on this learning outcome, I discovered how **fortunate I was to have experienced the 17-month delay** of the ROI pilot. I concluded that this delay allowed me to more comprehensively demonstrate my experiential learning and knowledge of this outcome in several ways.

Firstly, had the ROI pilot been implemented in 2020 as originally conceptualized, it would not have included **coaching** interventions, as coaching was not yet part in the Foundations programs. According to the premiere client's strategic point of contact (AP), demonstrating the ROI of the Foundations programs was a precursor to incorporating coaching. Due to the impact of COVID-19, the premiere client requested that the Foundations programs be offered virtually instead of in-person. Since my role, at that time, was to co-lead the redesign of the nine Foundations programs (refer to Learning Area 1, Introduction for details), I successfully persuaded my strategic point of contact (AP) to introduce and **integrate coaching sessions** as part of the redesigned the Foundations programs, compensating for the reduction in in-person facilitation hours (Evidence – LA1LO1.5 Bell Master Notes 2021 11 29 Addition of 50 Coaching Packages).

Secondly, if the ROI pilot had been implemented in 2020, I would not have had the **knowledge** to research and evaluate a methodology to measure learning effectiveness. My first knowledge of measuring coaching effectiveness came three months later, in May 2020, during my CBC™ coach training program and certainly before acquiring the relevant academic underpinning from my CMBC™ master coach training program, referenced above. Interestingly, while reviewing and analyzing the timing related to this learning outcome, I discovered that the exact date when the ROI pilot was announced, July 5, 2021, coincided with the date I acquired the academic underpinning on measuring ROI of coaching interventions in my CMBC™ master coach training program.

Thirdly, having only entered into a contract with Learn² on January 13, 2020, less than one month before the premiere client initially communicated the need to research and evaluate a methodology to measure effectiveness, the 17-month delay allowed me to expand my

role. I became the premiere client's point of contact and lead for the Foundations programs, thus also becoming the Learn² lead for the ROI pilot.

Finally, the delay afforded me the opportunity to speak with **Patti P. Phillips**, Ph.D. CEO of the ROI Institute and Registered Corporate Coach™ with the WABC, on July 14, 2021. It was thanks to the president of the WABC, Wendy Johnson, that I was able to converse with Dr Phillips (Evidence – LA1LO1.6 ROI Institute Assalian and Phillips). In reflecting on this opportunity, I was struck by the fortuitous timing of my conversation with Dr Philipps, as she reinforced the practical knowledge I had acquired on ROI in coaching.

In further reflecting on the 17-month period **between February 8, 2020**, when the premiere client initially communicated the need to research and evaluate a methodology to measure the effectiveness of its Foundations programs and **July 5, 2021**, when the ROI pilot was announced, both the premiere client and I experienced Volatility, Uncertainty, Complexity and Ambiguity (VUCA) due to COVID-19 (Barber, 1992). **For the premiere client**, all efforts to evaluate the effectiveness of its Foundations programs were put on hold as the priority shifted to managing its 52,000-person workforce through the challenges of the pandemic.

For me and my co-lead at the time, we experienced VUCA by having only four weeks to convert nine Foundations programs from in-person to virtual leadership development courses. In reflecting on my prior knowledge of VUCA, although I was familiar with VUCA as a component of the Foundations programs, this experience significantly elevated my understanding of its importance. Additionally, I acquired further knowledge on VUCA from attending an online conference entitled “Coaching in the Workplace” from June 24-26, 2020, where the presented discussed “The DNA of VUCA” (Peterson, 2020) (Evidence – LA1LO1.7 DNA of VUCA Peterson).

APPROACH TO COACHING EFFECTIVENESS METHODOLOGY

I will now critically analyze my coaching practice and knowledge related to the principle that coaching interventions are measurable, in order to inform my claim for credit. For clarity purposes, this learning outcome focuses on demonstrating the breadth of my experiential learning in **researching and evaluating a methodology** to measure coaching effectiveness. It also serves as a precursor to the next learning outcome, which centers on

the principle that coaching effectiveness methodology can be adapted to meet the specific needs of a client.

In reflecting on the research and evaluation I undertook to measure coaching interventions and leadership development programs, I recommended to my strategic (AP) and operational (JG) points of contact a methodology based on my **academic underpinning** I acquired during my master-level program of study for **measuring the ROI of coaching**.

The resulting recommendation of this learning outcome, which was to research and evaluate a methodology that supports the coaching principle that coaching interventions can be measured, was based on two critical academic frameworks:

1. The Kirkpatrick model (1977) and
2. Jack J. Phillips' article entitled "Measuring the ROI of a Coaching Intervention, Part 2" (2007).

In researching and evaluating the methods by which coaching interventions were measured, I recommended using the **Kirkpatrick model** (1977) as the underpinning theory for the ROI pilot in evaluating the Foundations programs, including coaching. This model had been identified (Ely *et al.*, 2010) as coaching, like training, is a strategy for learning.

Kirkpatrick's four levels of evaluation (1977) measures the following:

- Level 1 Reaction: the reaction of participants taken immediately following a learning intervention based on their personal evaluation of the program
- Level 2 Learning: the level of learning before and after a learning intervention
- Level 3 Behaviour: the level of behaviour change based on a learning intervention
- Level 4 Results: the quantifiable results based on a learning intervention

With respect to Jack J. Phillips' article entitled "Measuring the ROI of a Coaching Intervention, Part 2" (2007), in researching and evaluating the case study in this article, I recommended that two specific elements be incorporated into the ROI pilot methodology to support the measurement of coaching effectiveness:

1. Include a **5th level to Kirkpatrick's** model to measure the ROI of learning based on the result (level 4) of learning (1977) and

2. Isolate and measure the impact of coaching by asking learners to identify the **contribution and corresponding confidence** in the contribution that they attributed to coaching, calculated on a percentage basis.

An example of the contribution calculation (Evidence – LA1LO1.8 Sample of Suggested ROI Calculation) is identified at the end of this learning outcome.

In critically reflecting and analyzing my thoughts and feelings over the 17-month period between February 8, 2020, when the premiere client originally communicated its desire to initiate an ROI pilot and July 5, 2021, when the **ROI pilot** was announced, I experienced a range of emotions and evolving perspectives. Initially, I felt **defensive** as the value of the Foundations programs, which I was leading, was questioned and subject to evaluation. Upon deeper reflection, I concluded that my reaction contradicted my strong beliefs, described above, about the importance of measuring the effectiveness and ROI of leadership programs.

In 2020, when asked to recommend an ROI evaluation method for the Foundations programs, I also felt a wave of **fear and apprehension**. In reflecting and assessing the source of those feelings, I concluded that it stemmed from my newness to the role and organizational development, lacking prior experience in evaluating ROI for leadership and coaching programs. Concurrently, I felt **pressure** to perform due to the significance of the premiere client to Learn² and the potential ramifications on the premiere client if the ROI findings did not support their flagship program (refer to Learning Area 1, Learning Outcome 3 for further analysis and reflection regarding the quantifiable outcome of the ROI pilot).

In reflecting on my initial negative thoughts and feelings in 2020, those emotions shifted over the 17-month period. I became grateful for the opportunity to embed my interest in **ROI** and lead the pilot. Researching and evaluating a methodology to measure coaching interventions and leadership training **empowered** me. Several factors have contributed to this transformation. Firstly, there has been a progressive mastery of the Foundations programs over time. Additionally, a solid **academic underpinning** has been established through comprehensive master-level coach training. Furthermore, strong **relationships** have been cultivated with various stakeholders at the premiere client organization.

Upon critical reflection, by the time the ROI pilot was announced on July 5, 2021, I recognized a shift towards what Bandura termed “**self-efficacy**” (1977). In further analyzing my experience and breadth of learning acquired from this outcome, I discovered a link between my need for **self-efficacy** and my pursuit of **excellence**, which **both motivated me and** put pressure on me to deliver at a high level. I concluded that my self confidence stemmed from believing in my skills, capabilities and knowledge. Tschannen-Moran (2018, p. 203) referencing Bandura’s theory, defined self-efficacy as one’s belief in their ability to succeed which, for me, epitomized excellence.

ADDITIONAL COACHING

After having completed my research and evaluation to identify and recommend a methodology for measuring coaching interventions, I received positive news from my strategic point of contact (AP). On **November 29, 2021**, approximately four months after the ROI pilot was announced and prior to adapting the methodology to our premiere client’s needs, I learned that the ROI pilot would expand to include six additional **coaching sessions for 50 participants** (refer to Learning Area 1, Learning Outcome 2 for details).

For **context**, as mentioned earlier, following the redesign of the Foundations programs from in-person to virtual training, two coaching sessions had been successfully integrated into the program starting in April 2021. In reflecting and analyzing the reasons behind this positive development, I concluded that the decision to add 300 more coaching sessions (six sessions for 50 participants) stemmed from the positive **ratings and feedback** received from participants who accessed the initial two coaching sessions as part of the redesigned virtual Foundations programs.

In reflecting on **what went well**, although I concluded that I could not have predicted this new development, the impact of the six additional coaching sessions for 50 leaders yielded positive outcomes for two reasons. Firstly, it underscored the recognition of coaching as a valuable intervention in leadership development. Secondly, it provided an opportunity to quantitatively compare the impact of coaching to other training strategies, as Blackman *et al.* (2016) highlighted the appropriateness of such a comparison.

In critically reflecting on **what went well** during the research and evaluation process to identify a methodology supporting the principle that coaching interventions can be

measured, I concluded that my recommendation was grounded in **sound academic research** that was credible, reliable and tested. This validation stemmed from my choice to base the methodology on the **Kirkpatrick** model (1977) and Jack J. Phillips' article "Measuring the ROI of a Coaching Intervention, Part 2" (2007).

Additionally, what **also contributed** to the success was the initial alignment and commitment to the ROI pilot between myself and my operational point of contact (JG), who was my primary collaborator for the premiere client. In critically analyzing the origins of this alignment, I recognized it was largely due to our mutual respect and trust in our understanding of the **Kirkpatrick** model (1977) and the ROI **Institute** Methodology™. For instance, when I shared the article, my operational point of contact (JG) was already familiar with its contents, facilitating our collaboration and efficient work together from the outset.

In further reflecting on and critically analyzing the **source of our alignment**, I concluded that our **views and beliefs** were fundamentally aligned. Both of us shared a strong belief in the value of learning, leadership development and coaching as effective means to foster behavioural change and achieve learning objectives. This shared perspective significantly facilitated my task of researching and evaluating a methodology that supports measuring coaching effectiveness, making it less complex and challenging. Upon additional reflection, I also concluded that what contributed to **what went well** was the supportive working environment at Learn². Here, I had the **autonomy** to lead the ROI pilot project and the backing of my colleagues whenever needed, which greatly facilitated the successful execution of the project.

In critically evaluating **what did not go well**, I found that while nothing specific was negative, my familiarity with the Kirkpatrick model (1977) and the ROI Institute's Methodology™ outlined in Jack J. Phillips' article (2007) may have led me to narrow my focus too quickly. I realized that I did not explore alternative evaluation approaches or consider other case studies. My focus was primarily on positioning the model and the ROI Institute Methodology™ as the preferred methodology for the ROI pilot, without acquiring additional perspectives beyond my existing knowledge.

In further assessing **what did not go well**, I discovered that my recommendation for a methodology to quantifiably measure the effectiveness of coaching interventions and leadership development training was approved organically. In critically analyzing this

learning outcome, I found that there was no **specific documented approval date** from the premiere client regarding my recommendation. In critically reflecting on and analyzing this absence of formal approval, I realized that what I initially perceived as a negative could actually be viewed positively as it indicated that the premiere client and I were in total alignment throughout the research and evaluation of a methodology. For example, we had already initiated discussions on the next step in the process, which was to design and develop a bespoke coaching evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the customized needs of an organization (refer to Learning Area 1, Learning Outcome 2 for details).

Having researched, evaluated and recommended the methodology to measure coaching effectiveness, I also reflected on what I would do differently with future clients. I concluded that my approach would largely remain the same as it was for this premier client, as Evidenced in May 2020, after reading and reflecting on Phillips' (2007) article and its 14-step process to determine ROI. In my **assignment**, I argued that based on my coaching practice and experience working with organizations, the 14-step process needed to be **simplified** for most organizations (Evidence – LA1LO1.9 Think About M13 14 Steps).

In my final reflection and assessment, I concluded that I had a **gap** in my academic underpinning regarding the link between coaching **effectiveness and coaching qualifications**. I realized I needed more knowledge to understand if there was indeed a correlation between coaching qualifications and the success of coaching interventions. I discovered my bias in assuming such a link without conducting thorough research or analysis (refer to Reflective Essay for details).

Reflecting on this bias, I realized its personal significance. Above, I concluded that demonstrating coaching effectiveness was important to distinguish myself as a CMBC™ level coach. I questioned whether, without knowledge of a definitive link between coaching **effectiveness and coaching qualifications**, I would still have pursued my master designation and degree. Ultimately, I affirmed that my pursuit of coach training programs stemmed from personal importance and a belief in the critical role of knowledge acquisition in my practice.

In critically analyzing my experience and the breadth of learning acquired regarding the measurability of coaching interventions, I believe that I have demonstrated my ability to research and evaluate a methodology that supports the principle that coaching interventions can be measured, which I hope will serve to adequately make my claim for credit.

EXAMPLE OF CALCULATION

My recommendation for calculating the contribution of coaching and the Foundations programs based on the ROI Institute Methodology™.

Example:

- My actual metric was _____
- I attribute _____% of the actual impact result to the Foundations program (including Impact Coaching sessions I completed)
- I am _____% confident in my attribution

Calculation:

- My actual metric was \$50,000
- 40% attribution to Foundations program ($40\% \times \$50,000 = \$20,000$)
- 90% confident in my answer ($90\% \times \$20,000 = \$18,000$)
- The ROI of Foundations for this participant is **\$18,000** based on 36% net attribution ($40\% \times 90\% = 36\%$)

Learning Area 1: Research, design and evaluate coaching effectiveness within an organization through the use of coaching principles.

Learning Outcome 2:

Design and develop a bespoke coaching evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the needs of an organization.

Principle: Coaching effectiveness methodologies are adaptable

INTRODUCTION

To demonstrate the **breadth of experiential learning** I acquired in coaching principles, I will critically analyze my **professional and personal experiences**. This analysis will focus on the adaptability of coaching effectiveness methodologies to meet organizational needs, in substantiating my **claim for credit**.

This learning outcome aims to design and develop a bespoke coaching evaluation program, informed by the principle that the methodology for assessing coaching effectiveness can be adapted to meet organizational needs. This builds upon my reflections and analysis from the **previous learning outcome**. Therefore, my academic foundation for this learning outcome draws from and expands upon the two underpinning theories identified in the previous learning outcome (refer to Learning Area 1, Learning Outcome 1 for details):

1. The Kirkpatrick model (1977).
2. Jack J. Phillips' article entitled "Measuring the ROI of a Coaching Intervention, Part 2" (2007).

My critical analysis and evaluation of my coaching practice will focus on two key aspects:

1. The methods used to isolate and measure the effectiveness of **coaching interventions** within this bespoke methodology.
2. The **adaptation** of the leadership and coaching evaluation methodology to meet the customized needs of the client.

When the premiere client announced the launch of the **return on investment (ROI) pilot** to evaluate the effectiveness of the Foundations programs, including coaching interventions, on July 5, 2021, I was informed in my role as their primary point of contact. This announcement marked the preparation for implementation in **2022** (refer to Learning Area 1, Introduction for details on the Foundations programs and Learning Area 1, Learning Outcome 1 for details on the context for July 5, 2021). Anticipating this announcement, my strategic point of contact (AP) tasked her direct report, my operational point of contact (JG), with **developing** what I referred to as the **ROI implementation framework** for the pilot (Evidence – LA1LO2.1 Bell to Lead).

The ROI implementation framework aimed to establish the **principles and timelines** for the pilot, forming the basis for what I termed the **ROI implementation plan**. Together, these documents constituted the evaluation methodology for assessing the Foundations programs, including coaching interventions, tailored to meet the bespoke needs of the premiere client.

MY ROLE

Given that the premiere client was developing the ROI implementation framework, my role as product manager and lead for the delivery of the Foundations and coaching programs (refer to Curriculum Vitae for details) was to design, develop and execute the **ROI implementation plan** aligned with the established principles and timelines outlined in the **framework**. For instance, I engaged and onboarded a team of three coaches and four facilitators, clearly defining their roles within the ROI pilot. Additionally, I orchestrated the management of the ROI implementation plan, clearly delineating responsibilities between the premiere client and my team (Evidence – LA1LO2.2 Roles and Responsibilities). Upon critically examining how I allocated these responsibilities, I realized that I had based my decisions on an analysis of the premiere client's capability and capacity, thereby **adapting** the implementation of the evaluation methodology to suit their specific needs.

Initially, **my role** in the **ROI implementation framework** was not direct, as my operational point of contact (JG) was responsible for its development. However, upon critically reflecting on my involvement, I determined that I played a supportive role in shaping the ROI implementation framework by identifying and addressing perceived gaps. For instance, I

advocated for establishing a principle regarding the desired English-to-French participant ratio and recommended **eliminating** the Level 2 learning component from Kirkpatrick's model (1977) in the ROI pilot (Evidence – LA1LO2.3 2021 12 16 Slide 8 & 35). This decision stemmed from my evaluation that the additional workload for participants did not align with the premiere client's desired outcomes. Below, I will critically analyze my contributions to the development of the ROI implementation framework.

HOW I ADAPTED AND ISOLATED COACHING INTERVENTIONS

To inform my claim for credit, I will critically analyze my **coaching practice**, focusing on what I learned from designing, developing and **adapting** the evaluation methodology to meet the premiere client's specific needs while isolating and measuring the effectiveness of coaching interventions.

In critically reflecting on and analyzing the process of obtaining **quantitative data** to assess the effectiveness of the Foundations programs, including coaching interventions, while **adapting** to the client's unique needs, I identified two critical approaches:

Firstly, drawing on the academic underpinning from Jack J. Phillips' article, "Measuring the ROI of a Coaching Intervention, Part 2" (2007), I utilized aspects of contribution, termed **attribution**, and **results-based project measurement**. Upon reflection, I determined that the **impact project** inherent to the Foundations and coaching programs could serve as the results-based project outlined in the article. This decision aligned with the client's requirements to avoid additional participant workload, as the impact project was already integral to the programs. Consequently, I adapted Phillips' (2007) attribution methodology to collect quantitative data on the impact project. This involved participants self-determining its economic value, identifying completion status as a percentage and **attributing a percentage** to the economic outcome influenced by the Foundations and coaching programs, including the additional coaching sessions where applicable (see example at the end of this Learning Outcome).

The **second approach** I used to adapt the methodology and compile **quantitative data** for the evaluation was derived from the academic underpinning of the same article. After examining various methods to quantitatively assess the impact of learning for the premiere

client, I concluded that we could apply the calculation in Phillips' article (2007), as described above, to ascertain the economic value that the Foundations programs, including coaching interventions, contributed to participants' **leadership development**. This involved asking participants to specify, in percentage terms, the influence of the Foundations and coaching programs on their acquired **leadership** capabilities (Evidence – LA1LO2.4 Sample of People Leader Questionnaire).

In critically analyzing **my thoughts and feelings** after designing and developing a methodology to quantify the effectiveness of the Foundations and coaching programs, while also **adapting** to the client's unique needs and isolating coaching effectiveness, I experienced a sense of **relief**. I recognized the importance of grounding the methodology in comprehensive knowledge, rather than solely relying on participants' impact projects to determine the ROI of the Foundations programs and coaching interventions. In critically reflecting on my coaching practice, I identified the risk of focusing exclusively on impact projects for the evaluation as participants might discontinue their projects for reasons unrelated to the programs, such as job transfers. This insight led me to further adapt the methodology to accommodate both the client's requirements and the realities faced by participants, ensuring the integrity and reliability of the ROI pilot outcomes.

In critically examining my coaching practice and experience, I realized that not all my efforts to persuade the premiere client to adapt the methodology for assessing coaching effectiveness and the Foundations programs were successful. Specifically, I was unable to advocate effectively for both professional participants and people leaders to be eligible for the six additional coaching sessions. Upon reflection, I understood that my focus on developing a methodology to assess coaching interventions may have overshadowed the client's need to prioritize people leaders over professionals, leading to the exclusive allocation of additional coaching sessions to people leaders. I felt **disappointed** because I believed this decision would prevent the ROI pilot from accurately reflecting the true impact of coaching interventions on professional participants. While I acknowledged that the decision aligned with the organization's needs, I also recognized its potential negative impact on designing and developing a methodology that effectively isolated and measured coaching effectiveness.

In critically reflecting on and exploring my coaching practice and experiential learning from this learning outcome, which aimed to design and develop a bespoke coaching evaluation program based on the principle that the methodology to assess coaching effectiveness can be adapted to meet the needs of an organization, I will now objectively analyze both the **negatives and positives** of my practice to inform my claim for credit.

In contemplating and critically scrutinizing what I learned from this learning outcome, I discovered four aspects of designing and developing a customised evaluation program to assess coaching effectiveness while adapting to organizational needs that did **not go well**:

1. Discrepancies between the ROI implementation **framework** and the ROI implementation **plan**
2. Low **participation rates**
3. **Completion** of the ROI pilot report
4. Request for a **randomized control trial (RCT)**

DISCREPANCIES BETWEEN THE ROI IMPLEMENTATION FRAMEWORK AND THE ROI IMPLEMENTATION PLAN

As stated above, the ROI implementation **framework** and the ROI implementation **plan** were intended to work in tandem to form the evaluation methodology for assessing the Foundations programs, including coaching interventions, tailored to the bespoke needs of the premiere client. In reflecting on and critically analyzing what **did not** go well, I concluded changes and delays in finalizing principles within the ROI implementation framework compromised its effectiveness as the foundation for the ROI implementation plan. This discrepancy meant that the execution of the plan, which I led, could not accommodate further delays, especially since the evaluation methodology implementation had been scheduled for February 8, 2022.

In examining the negative implications stemming from the misalignment between the completion of the framework and the development of the ROI implementation plan, I discovered several **inconsistencies**. For instance, the framework retained **Level 2 learning** from Kirkpatrick's model (1977) for evaluation purposes, for reasons stated above, whereas the ROI implementation plan excluded it. Another inconsistency was found in the number of participants. The framework estimated 200 participants, while the plan indicated

140 participants (Evidence – LA1LO2.5 Discrepancy in Total Participants Slide 10).

Additionally, descriptors for **Level 3 and Level 4 results for professionals and people leaders** respectively, were contradictory and never rectified.

In critically considering and evaluating the impact of these and other inconsistencies, I concluded that, given the complexity of the **evaluation methodology**, which included five levels of evaluation, 140 participants, nine Foundations programs with nine corresponding sets of timelines, 300 additional coaching sessions and internal colleagues including three coaches and four facilitators, it must have been exceedingly difficult for decision-makers and those not engaged in the project on a daily basis to fully comprehend the methodology designed and developed to evaluate the effectiveness of the Foundations and coaching programs.

In critically reflecting on and analyzing **my role** pertaining to what **did not go well** with the ROI implementation framework vis-à-vis the ROI implementation plan, I identified **three contributing** factors. **Firstly**, I unintentionally stepped **back** from actively engaging in the design and development of the framework to focus on facilitating and coaching participants during the Fall edition of the Foundations programs, which began at the end of August 2021 (Evidence – LA1LO2.6 Fall 2121 Foundations Schedule). In considering and assessing the justification for my **hands-off** approach, I determined that it stemmed from my limited **capacity** to fully support the ROI implementation framework at that time.

Secondly, given the close alignment my operational point of contact (JG) and I had during the research and evaluation phase of the methodology (refer to Learning Area 1, Learning Outcome 1 for details), I **assumed** that this alignment would naturally extend to the development of the ROI implementation framework. This assumption influenced my approach and level of involvement.

Lastly, lacking prior **experience in** evaluating leadership development or coaching programs, I initially doubted my ability to contribute effectively to identifying essential components of the ROI implementation framework. I believed that my lack of prior experience would hinder rather than add value to the framework, leading me to adopt a more reactive approach, providing support only when explicitly needed.

In contemplating and determining **what I would do differently**, I identified **two key areas** for improvement in my future approach. **Firstly**, I would avoid rigidly separating the responsibilities between the ROI framework, viewed as the client's domain, and the ROI plan, considered my own. I learned the importance of fostering a mindset that encourages co-creation, recognizing their significant interdependencies for a more integrated approach.

Secondly, in reflecting on how I **would do things differently** if I were to undertake this process again, I determined that I would prioritize discussions with my points of contact to identify **areas for improving** the evaluation methodology. Understanding what not to do in establishing the methodology was as crucial as determining **what actions to take**. This approach would better support the development and adaptation of a methodology tailored to meet the client's specific needs while effectively isolating the economic impact of coaching interventions.

LOW PARTICIPATION RATES

In critically analyzing further aspects that **did not** go well in adapting the customized methodology to evaluate the Foundations and coaching programs, I determined that participant engagement levels were lower than expected. For instance, out of the 50 people leader participants eligible for additional coaching sessions, only 60% (30 participants) completed all six coaching sessions (Evidence – LA1LO2.7 Status of Coaching Completion Rate. Slide 8). Similarly, among the 28 professional participants invited to quantify the economic impact and benefits of the Foundations programs, including the two coaching sessions, only 50% (14 participants) responded to the questionnaire and interview (Evidence – LA1LO2.8 L3 Professionals Slide 5. 14 of 28 Responses). Furthermore, of the 140 participants in the ROI pilot, only 7% (10 participants) had their leaders complete both the pre- and post-behaviour assessment (Evidence – LA1LO2.9 BARS 7% Response Rate – Slide 6). These assessments used a Behaviour Anchored Rating Scale (BARS) (Spangenberg *et al.*, 1989) based on the original concept by Smith and Kendall (1963, p. 149) called the “unambiguous anchors for rating scales”.

In examining the decision to involve each participant's leader in assessing behavior change, as requested by the premiere client but not grounded in theory or previous experience, I found this to be another challenge. After reporting the completion rates, the premiere client expressed disappointment with the low 7% response rate from participants' leaders.

In further reflecting and critically **evaluating the rates of engagement** in the evaluation methodology, I realized that my **expectations were not grounded** in academic underpinning but rather on assumptions and personal expectations (refer the Reflective Essay for details). For instance, I assumed that all leaders would fully embrace the opportunity to receive as much **coaching as possible**. I learned that I needed to have **acquired additional knowledge** from other academic case studies in coaching to validate and benchmark participant engagement levels, especially concerning the 60% coaching completion rate.

Moreover, I discovered that another factor could have been the inadequacy of adapting the methodology in partnership with the premiere client to meet the needs of their internal stakeholders, such as the participants and their leaders. If I were to approach this again with future clients, I would highlight the necessity of discussing and aligning the methodology adaptation process when client needs diverge from participant needs.

COMPLETION OF THE ROI PILOT REPORT

In reflecting and critically assessing what else **did not** go well in adapting the customized methodology to evaluate the Foundations programs, including coaching interventions, I concluded that the 2022 end-of-year ROI report was not comprehensive. Specifically, it did not include the quantifiable data on coaching effectiveness from all the people leader participants who received the six additional coaching sessions. In investigating the reasons behind these challenges, I pinpointed two main causes.

Firstly, during the design and development of the evaluation program, the focus was primarily on initiating each level of the evaluation methodology for each cohort rather than ensuring completion. **Secondly**, the adaptation of the evaluation methodology to meet the specific needs of participants sometimes conflicted with the overall timeline and requirements of the premiere client. For instance, according to the ROI implementation framework's timeline, the last people leader cohort needed to commence their six additional coaching sessions by July 2022, assuming a monthly coaching session cadence. When this timeline was not met, it inevitably delayed the final delivery of the ROI pilot report by December 2022.

In critically reflecting on and analyzing **my role and the challenges encountered** with the timely completion of the ROI pilot final report, I determined that, as the person responsible for executing the ROI implementation plan, I should have anticipated and communicated early on that the evaluation methodology to assess coaching effectiveness would not be completed by year-end since it was on July 29, 2022, that I was asked to postpone the coaching sessions until Fall 2022 (Evidence – LA1LO2.10 Request to Postpone Coaching).

Due to my lack of prior experience in such a role, I did not fully grasp the implications of **delaying coaching sessions** on the timeline for producing the ROI pilot final report. After having critically reflected and examined why I may have overlooked these consequences, I acknowledged that my attention was divided as I had recently accepted a one-year appointment as Chief Executive Officer (**CEO**) of Learn², beginning February 15, 2022. Despite my confidence in managing multiple responsibilities, including designing and developing an evaluation methodology, this new role presented unforeseen challenges.

In critically reflecting on the delayed timeline for the production of the ROI pilot final report, I realized the need to continuously adapt the evaluation methodology to find solutions that meet the needs of the premiere client. For instance, I could have proposed adjusting our methodology to evaluate the effectiveness of the Foundations and coaching programs after **five coaching sessions instead of six**. This adaptation could have ensured that the ROI pilot final report was completed by end of 2022, despite the postponement of coaching sessions.

In critically reflecting on this learning outcome, which aimed to design and develop a bespoke coaching evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the needs of the organization, I realized that adapting to the client's needs should have been an **ongoing process**. I discovered that I had only adapted the methodology to meet the premiere client's needs once, during the design and development stage of the ROI implementation plan.

In considering the experiential learning from this learning outcome, I discovered a **gap in my knowledge**. I concluded that I needed to **acquire additional academic underpinning** from case studies that detail potential pitfalls in designing and developing a customized evaluation program to determine the effectiveness of learning and coaching interventions.

In critically reflecting on the sentiments of my strategic point of contact (AP), although they never explicitly expressed it, I believe there may have been **disappointment regarding the non-completion** of an all-inclusive ROI report by December 2022. However, in reflecting on the decision to prioritize the needs of the coachees, I am convinced that both the client and I agreed on the importance of prioritizing the coachees' needs.

REQUESTING A RANDOMIZED CONTROL TRIAL

In reflecting and critically assessing what else **did not go well** in designing and developing a customized methodology, I concluded that my proposal to the premiere client regarding their openness to conducting a RCT did not appropriately adapt to the uniqueness of the organization. I first learned about the concept of RCTs during my master coach training program in 2021 with Dr **Peggy Marshall** at the Global IOC, as part of my pursuit of the **Certified Master Business Coach™** (CMBC™) designation from the Worldwide Association of Business Coaches (WABC) (refer to curriculum vitae for details). During this training, I acquired the knowledge from Clutterbuck (2014, quoted in Fillery-Travis and Cox, 2018, p. 520) that RCT studies were considered the “gold standard” in research.

In reflecting and critically analyzing my coaching practice and knowledge of RCT, I discovered that my understanding of the significance of RCTs led me to view the ROI pilot as an opportunity to contribute to that body of knowledge. However, upon deeper reflection and questioning my intentions, I found that my motive for soliciting interest in conducting an RCT was driven more by the academic challenge of producing a study designed for coaching ROI rather than by adapting to the specific needs and realities of the premiere client.

Having completed my reflection and examination of **what did not go well** in this learning outcome, which aimed to design and develop a bespoke coaching evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the needs of an organization, I will now critically analyze my professional and personal experiences to highlight what went well, to further strengthen my claim for credit.

In contemplating and critically scrutinizing what I learned from this learning outcome, I identified three main aspects of designing and developing a customised evaluation program that assesses coaching effectiveness while adapting to organizational needs, that went **well**.

1. Collaboration
2. Participants' learning experience
3. Schedule provided a testing opportunity

COLLABORATION

In critically examining what **went well**, I determined that the level of **collaboration** between myself, my points of contact at the premiere client and my Learn² team was exemplary. Several factors contributed to this successful **partnership**. **Firstly, recognizing the** strategic importance of the ROI pilot project, both the premiere client and I prioritized the design and development of the customized evaluation program for the Foundations programs, including coaching interventions. **Secondly, our responsiveness** during the ROI pilot was exceptional. We adjusted the methodology promptly in response to unforeseen challenges. A notable **example** of our collaboration and **adaptability** was when four Francophone cohorts did not meet the minimum registration threshold of 10 participants. Typically, these cohorts would have been cancelled. However, during a meeting on March 21, 2022, my **new** operational point of contact (EG) and I decided to merge the CP2 professional Foundations program cohort with the CP2 people leader Foundations program cohort, demonstrating flexibility and our commitment to the project's success. The same was taken with the CP3 cohorts.

Thirdly, the success of our partnership was bolstered by mutual respect, clearly defined roles, effective communication and trust between relevant parties from the premiere client and Learn². Even when there was a **change in my operational point** of contact in September 2021, when my previous contact (JG) went on a one-year parental leave and was replaced (EG), the transition was managed smoothly.

In critically reflecting on **my thoughts and feelings** at the time, I initially felt disappointed and concerned about the change in personnel because I had developed a strong synergy and shared an understanding of the academic underpinnings upon which the evaluation

methodology was based. I was worried that my new point of contact (EG), might lack the necessary background, presenting a risk to the implementation of the evaluation methodology. However, upon reflection, I **learned** that my concerns were unfounded. The transition was seamless and they (EG) quickly integrated into the project team, ensuring continuity in the design and development of the Foundations programs, including coaching interventions and the evaluation methodology.

PARTICIPANTS' LEARNING EXPERIENCE

In reflecting and critically assessing what else **went well**, I determined that the methodology to measure the Foundations programs, including coaching interventions, was successfully designed, developed and adapted in a manner that aligned with the premiere client's primary need to prioritize the **participant experience** and minimize negative impacts on their workload.

In critically considering and dissecting what was done to preserve the **participant experience**, I concluded that the premiere client and I strategically maintained **transparency** in communicating the purpose of the ROI pilot, its expected requirements and its voluntary nature, allowing participants to opt out at any time.

In critically reflecting on my professional experience and coaching practice within this learning outcome, which aimed to design and develop a bespoke evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the needs of an organization, I discovered a **gap in my knowledge**. I learned that I lacked the academic underpinning and experience in soliciting stakeholder feedback to critically appraise the evaluation methodology itself. This gap is crucial for my continuous learning journey and for enhancing my coaching practice with future clients who seek to quantifiably evaluate coaching or learning programs.

THE SCHEDULE

In considering and critically examining what **went well**, I concluded that, although unintentional, the scheduling of the delivery of the nine Foundations programs (refer to Learning Area 1, Introduction for details) from which the ROI pilot participants were identified, inadvertently included a **five-week gap** between the initial set of three cohorts

and the subsequent cohorts used to evaluate the effectiveness of the Foundations programs, including coaching interventions (Evidence – LA1LO2.11 Schedule Showing 5 Week Gap. Slide 3). Reflecting on the benefits of this period, I determined that some of the adaptations in the design and development of the methodology, as described above, occurred during that interval.

The following **two examples** illustrate how the five-week period aided the adaptation of the design and development of the evaluation methodology. The **first example** pertains to the original evaluation methodology, which, as identified above, proposed that only the participant's **impact project be used** as the source of quantitative data. I considered this a **narrow** view of the ROI of learning. The five-week gap enabled me to adapt the methodology by testing my proposed solution of using the calculation in Phillips' article (2007) as a principle to determine the economic value of the Foundations programs, including coaching interventions, beyond the impact project.

After carefully examining the outcome of the test involving two of my non-ROI pilot coachees, I concluded that the methodology could be successfully **adapted** to demonstrate coaching effectiveness by asking participants to identify, by percentage, the impact and attribution that the coaching interventions had on their overall **leadership development** (Evidence – LA1LO2.12 ROI Using Leadership Development Capabilities. Slide 18).

In critically reflecting on and analyzing the successful outcome of the test, I learned that I sometimes focused too much on **planning and discussing** what ought to be done rather than testing and demonstrating how something could be done. I recalled that the premiere client **originally did not agree** to adapt the methodology to evaluate the effectiveness of the Foundations programs, including coaching interventions, beyond the impact project because it was seen as too complex. I concluded that the **five-week gap** provided the opportunity and capacity to **test a solution** that met the needs and principles of the premiere client.

While the first example demonstrated how the five-week scheduling gap benefitted the adaptation of the evaluation methodology based on my initiative, the **second example** resulted from an amendment brought forth by the premiere client.

As referenced above, the premiere client, who had originally decided for confidentiality purposes and against my recommendation, that the participant's leader would complete the pre and post program behavioural assessment for their direct report **anonymously, changed their decision** (Evidence – LA1LO2.13 BARS Pre & Post Assessment Anonymity). In critically reflecting on and appraising the impact of the decision reversal, I concluded that the five-week period provided time for my internal subject matter expert (AD) and me to modify the BARS (Spangenberg *et al.*, 1989) assessment and manage the associated administrative workload to adapt the methodology to meet the needs of the premiere client.

Reflecting on my experiential learning, I determined that for future clients who want to introduce a new initiative, especially one to evaluate their investment in coaching or learning, I will highly recommend integrating a testing period into the schedule. This allows for continuous adaptation of the design and development to meet the needs of their organization, as not all needs may be known at the onset.

FINAL THOUGHT

Having critically reflected on and analyzed this learning outcome, I concluded that despite certain challenges outlined above, the design and development of a bespoke evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted, was successful. It met the needs of the organization in quantifying the financial ROI of the Foundations programs while isolating the impact of coaching interventions. Although the findings of what I learned from this critical, complex and extensive ROI project undertaking will be reported in the **next learning outcome, my points of contact were delighted** with the outcome of the customized design, development and implementation of the evaluation methodology, based on the premiere client's internal report.

In my final reflection and after having critically analyzed my coaching practice and the knowledge gained from this learning outcome, I concluded that although some researchers such as Fillery-Travis and Cox, have found that the financial ROI of coaching within an organizational context is **particularly challenging** to determine (2018, p. 522), the breadth of experiential learning I acquired has equipped me to work with future clients to quantifiably

measure the effectiveness of coaching and other learning interventions. Therefore, I believe that I have demonstrated my ability to design and develop a bespoke coaching evaluation program informed by the principle that the methodology to assess coaching effectiveness can be adapted to meet the needs of an organization, which I hope will serve to adequately support my claim for credit.

CALCULATION

Example of how I calculated the financial impact of the Foundations programs and coaching interventions.

Net and realized financial outcome of Foundations programs including two coaching sessions based on impact projects	Example
Impact project value	\$100,000
Completion Status (0-100%)	75%
Attribution of Foundations program (0-100%)	30%
Confidence in attribution (0-100%)	80%
Net attribution	24% (30% x 80%)
Net financial outcome of impact project	\$24,000 (\$100,000 x 24%)
Realized financial outcome of impact project	\$18,000 (\$100,000 x 75% x 24%)

Financial outcome of Foundations programs and six additional coaching sessions based on leadership development capabilities	Example
Median annual salary	\$100,829
Attribution of Foundations Program (0-100%)	18%
Attribution of additional coaching sessions (0-100%)	22%
Confidence in attribution (0-100%)	80%
Net Attribution of Foundations programs and additional coaching	32% (18% + 22%) x 80%
Financial outcome of Foundations and additional coaching on leadership	\$32,000 (\$100,000 x 32%)

Learning Area 1: Research, design and evaluate coaching effectiveness within an organization through the use of coaching principles.

Learning Outcome 3:

Critically evaluate and quantify the effectiveness of coaching interventions within an organization based on the principle that coaching programs can produce quantifiable outcomes.

Principle: Coaching interventions produce quantifiable return on investment

INTRODUCTION

To demonstrate the depth of **experiential learning I acquired** by evaluating and quantifying the effectiveness of coaching interventions, I will **critically analyze** my coaching experience to **substantiate my claim for credit**. This learning outcome, which focuses on critically evaluating and quantifying the effectiveness of coaching interventions within an organization based on the principle that coaching programs can produce measurable results, builds upon my critical reflection and analysis from the previous learning outcome. I will assess, measure and report the **quantifiable results of the Foundations and coaching programs, wherever possible isolating and measuring the impact of** coaching interventions, using a methodology grounded in the two **academic underpinnings** (refer to Learning Area 1, Learning Outcome 2 for details):

1. The Kirkpatrick model for evaluation (1977).
2. Jack J. Phillips' article entitled "Measuring the ROI of a Coaching Intervention, Part 2" (2007).

In critically evaluating and quantifying the outcomes of the evaluation methodology that assessed the effectiveness of the Foundations programs, including coaching interventions, I will reflect and analyze my professional and personal experience to provide a comprehensive report on each aspect of the ROI pilot project. This analysis will be based on the five levels outlined below. A summary of these five levels can be found at the end of this learning outcome.

LEVEL 1: REACTION

In critically examining the benefit of evaluating participant reactions based on Level 1 of Kirkpatrick's model (1977), the premiere client and I concluded that quantifying, evaluating and comparing reactions across both pilot and non-pilot participants, would not provide additional value, given the uniform application of the evaluation methodology. Therefore, we agreed that focusing on this level of evaluation was unnecessary for our analysis.

In critically reflecting on this learning outcome, I retroactively analyzed and compared the reaction ratings of the pilot and non-pilot groups to assess potential benefits for my coaching practice. Examining the quantifiable reaction ratings, I found no meaningful difference between the two groups. The average combined recommendation rate for the pilot cohorts was 4% higher than that of the non-pilot cohorts (98% vs 94%). Additionally, the premiere client's key rating, called the Bell metric, which measures the percentage of participants rating their experience between eight and ten on ten, divided by the total number of respondents, showed a 1% difference, with non-pilot cohorts scoring 85% compared to 84% for the pilot cohorts.

Critically analyzing these ratings, I concluded that there was no meaningful difference in the effectiveness of the Foundations and coaching programs, as the evaluation methodology and program content were consistently applied.

Reflecting on what was done **well**, I concluded that the similarity in the reaction ratings between the pilot and non-pilot cohorts validated the premiere client's principle of designing an evaluation methodology that did not negatively impact the pilot participant's learning experience (refer to Learning Area 1, Learning Outcome 2 for details). This approach effectively maintained the integrity of the participant's learning experience, which was a positive outcome.

LEVEL 0 & 2: BEHAVIOUR

In critically examining and evaluating the behavior of the pilot participants based on Kirkpatrick's model (1977), I concluded that we successfully quantified the impact of the Foundations programs, including its two coaching sessions, on elevating participants' behavior across eight learning outcomes. All pilot participants and their leaders were asked to complete an eight-question, seven-point proficiency assessment using a Behaviour

Anchored Rating Scale (BARS) (Spangenberg *et al.*, 1989), based on the original concept by Smith and Kendall (1963, p. 149) called the “unambiguous anchors for rating scales”. These assessments were administered before and two months after completing the Foundations programs and coaching sessions.

Reflecting on **my role** in designing and developing the assessment, I presented the premiere client with two options for evaluating participant proficiencies: the premiere client’s Leadership Success Profile (BLSP), which defined the desired leadership attributes and the learning outcomes of the Foundations and coaching programs (Evidence – LA1LO3.1 BLSP vs Learning Outcomes for Assessment). On January 18, 2022, I recommended that, to measure and evaluate the effectiveness of the Foundations and coaching programs in developing desired leadership proficiencies, the assessments should specifically be based on the learning outcomes of these programs as per the ROI Institute (2019) (Evidence – LA1LO3.2 Assessments based on Learning Outcomes – p. 19-20).

In evaluating the outcomes from the 68 of 140 pilot participants (49%) who completed both the pre and post assessments, I found an overall quantifiable increase in the proficiency levels across all eight learning outcomes for pilot participants in all five programs (CP2 and CP3 professionals, CP2, CP3 and CP4 people leaders). The CP2 professionals exhibited the largest shift in proficiency levels, while the CP2 people leaders showed the smallest shift (Evidence – LA1LO3.3 Assessment pre & post Outcomes – Slide 7).

Focusing on the CP2 people leaders who had the smallest change in proficiency levels, I identified several potential reasons: participants may have overestimated their pre-program proficiency levels, the program content may not have been as effective for this group or the average reporting method might have been influenced by a few participants’ self-assessments.

In critically reflecting and analyzing the overall increase in proficiency, I felt relieved because the results, reported to the premiere client by my colleague and subject matter expert (AD) on September 19, 2022, confirmed that the Foundations programs, including its two coaching sessions, improved the participants’ leadership competencies across all eight learning outcomes (Evidence - LA1LO3.3 Assessment pre & post Outcomes – Slide 7).

In evaluating this learning outcome, I concluded that since the evaluation methodology did not isolate the contribution of the two coaching sessions to the change in behavioral proficiency, I could not yet determine and quantify coaching effectiveness.

Reflecting on my academic foundation, I discovered three gaps in my knowledge:

1. A reference point to benchmark and interpret the level of proficiency improvement necessitated further study on the quantifiable shift in proficiency
2. Designing an evaluation methodology that isolated and measured the effectiveness of coaching interventions compared to other learning programs
3. Translating quantifiable outcomes into financial ROI, crucial for future clients interested in quantifying the financial impact of coaching or learning interventions.

Finally, I concluded that my recommendation to remove the learning element of the Kirkpatrick model (1977) was the right decision, as there was no identified gap in the evaluation outcome, and the premiere client did not reference any negative impact from this removal (refer to Learning Area 1, Learning Outcome 2 for details).

At this point in my learning outcome, I have developed the capacity to critically assess coaching effectiveness by leveraging Kirkpatrick's model (1977) to quantify behavioral changes resulting from learning interventions, including coaching, in alignment with organizational learning objectives. This experience enhanced my confidence and ability to demonstrate the tangible impact of coaching on leadership development, aligning with the strategic goals of the organization.

Furthermore, this learning has enhanced my ability to provide evidence-based insights, enabling clients to make informed decisions about their leadership development strategies and understand the tangible benefits of incorporating coaching into their organizational framework.

In critically reflecting on my **feelings** about my learning thus far, I felt a profound sense of relief and validation despite the initial challenges and knowledge gaps. The successful quantification of behavior change resulting from the Foundations programs underscored my belief in the importance of quantifying learning interventions within organizations. This accomplishment reinforced my confidence **in the value of my work** and its potential to significantly enhance organizational development and leadership effectiveness.

LEVEL 3 PROFESSIONALS AND LEVEL 4: PEOPLE LEADERS RESULTS

In critically evaluating the quantitative data from the results phase of the evaluation methodology based on Kirkpatrick's model (1977) for the professionals (Level 3) and people leaders (Level 4), I concluded that the design and development of the ROI implementation methodology were successful in evaluating and quantifying the effectiveness of the Foundations programs and coaching interventions within an organization. This success aligns with the principle that coaching programs can produce quantifiable outcomes.

Quantitative data was collected from 14 of 28 ROI professional participants (50%) during a 30-minute, ten-question interview six months after completing the Foundations and coaching programs. Additionally, data was gathered from 30 of 50 ROI people leader participants (60%) who completed all six additional coaching sessions following the Foundations program and two coaching sessions. These data sets were critically evaluated to determine the effectiveness of the Foundations programs and coaching interventions.

I will now critically analyze and evaluate the responses from the 47 interviews (14 professionals and 30 people leaders) to critically reflect on my coaching practice and determine the effectiveness of the Foundations programs and additional coaching interventions. This analysis will use the quantitative outcomes from each participant's **impact project** as the results-based project referenced in Jack J. Phillips' article entitled "Measuring the ROI of a Coaching Intervention, Part 2" (2007) and **leadership development capabilities** from their overall learning experience, defined as the in-class training component of the Foundations programs, including two coaching sessions and, where relevant, additional coaching interventions.

The quantitative data from both the impact projects and leadership development capabilities will be **examined and compared** in two ways: **first**, as two consolidated groups (professionals to people leaders) and second, by level (CP2 professionals to people leaders and CP3 professionals to people leaders). Since there was no comparable group of CP4 professionals in the pilot, the data from CP4 people leader participants who received additional coaching would be excluded from the consolidated groups findings to increase validity of the results. The analysis of CP4 people leader participants will be included later in this learning outcome.

I will now look to critically reflect on and analyze my professional and personal experiences to evaluate and quantify the impact of participants' overall learning experience on both their impact projects and leadership development capabilities. This reflection aims to inform my claim for credit and to isolate, evaluate and quantify the effectiveness of coaching interventions compared to other learning interventions within an organization.

LEVEL 3 PROFESSIONALS AND LEVEL 4: PEOPLE LEADERS RESULT SUMMARY

In reflecting on this learning outcome, which aimed to critically evaluate and quantify the effectiveness of coaching interventions within an organization based on the principle that coaching programs can produce quantifiable outcomes, I **concluded** that the significant and meaningful **quantifiable outcomes** from both the **impact projects** and **leadership development capabilities** were **greater** for the group of **people leader participants** who received **additional coaching** compared to the group of professional participants who did not.

My analysis and evaluation will begin with quantifying the outcomes from the impact projects, followed by quantifying the outcomes of their leadership development capabilities. In both cases, the results for participants who received additional coaching will be measured and compared to those who did not receive additional coaching.

LEVEL 3 PROFESSIONALS AND LEVEL 4: PEOPLE LEADERS - RESULTS USING IMPACT PROJECTS

In critically appraising and interpreting both the **consolidated and by-level** data from the **impact projects**, I found that the **quantifiable** outcomes were greater for the **people leader** participants who received additional coaching compared to the professional participants who did not. This conclusion is based on the **net financial outcome** and **realized financial outcome** of their impact projects (Evidence - LA1LO3.4 Calculations for L3 L4 and L5). Drawing on Jack Philipps' article (2007), I calculated the **net financial outcome** of each impact project and then determined the actual **financial outcome** realized at the conclusion of the participant's learning experience (Evidence - LA1LO3.5 Example of ROI Calculation based on Impact Project - p. 12). **Table 1** below shows the net and realized financial outcomes of the impact projects by level and consolidated.

In examining and quantifying the consolidated **net financial outcome** and **realized financial outcome** of the impact projects for the groups that received additional coaching and those that did not, I concluded that the net and realized financial outcomes were \$75,949 and \$60,227 greater, respectively, for the group that received additional coaching. Further analysis by level showed consistent results: the CP2 group that received additional coaching had net and realized financial outcomes of \$24,520 and \$19,376 greater, respectively, than the CP2 group that did not. Similarly, for the CP3 groups, the net and realized financial outcomes for those who received additional coaching were \$51,428 and \$40,851 greater, respectively, than for those who did not.

Table 1: Example of the Net and Realized Financial Outcomes of the Impact Projects

Financial Outcome	With additional coaching (People Leaders)			No additional coaching (Professionals)			Difference		
	CP2	CP3	Total	CP2	CP3	Total	CP2	CP3	Consolidated
Net	\$32,562	\$62,941	\$95,503	\$8,042	\$11,512	\$19,554	\$24,520	\$51,429	\$75,949
Realized	\$26,050	\$50,982	\$77,032	\$6,674	\$10,131	\$16,805	\$19,376	\$40,851	\$60,227

In critically investigating the quantitative outcomes of each participant's impact project, I found **two instances** where the data from the professional groups without additional coaching were greater than the people leader groups with coaching: the **completion status** of both consolidated and by-level groups and the **confidence in the attribution** for the CP3 professionals. In critically reflecting on and analyzing these anomalies, I determined that this data was not material to the ROI objectives, as completion status and confidence were not priorities for the premiere client. The overall findings still demonstrated that the net and realized financial outcomes of the impact projects were greater for the groups that received additional coaching.

In further considering and assessing the cause behind the completion status anomaly, I determined that the people leader groups with additional coaching selected impact projects of high value (CP2 \$74,005; CP3 \$165,633) compared to those without additional coaching (CP2 \$52,184; CP3 \$115,124), possibly requiring more time to complete and resulting in lower completion status. In critically reflecting on the reason for the second anomaly, I concluded that the higher degree of confidence in attribution by CP3 professionals (100%), was not surprising given their lower average attribution (10%).

I was pleased with the findings, as they benefited both the premiere client and Learn². However, I regretted not securing approval to allocate additional coaching sessions to both the professional and people leader participants, which would have provided a more accurate comparison of the quantifiable outcomes of coaching interventions (Evidence - LA1LO3.6 Additional Coaching only for People Leaders - p.14). I also recognized the need to account for potential inherent differences between professional and people leader groups, which introduced slight uncertainty in comparing the impact projects. This experience highlighted the necessity of acquiring additional knowledge on identifying and analyzing quantifiable outcomes for potentially disparate groups.

In critically considering my practice, I determined that **what I did not to well** was to anticipate that the realized financial value of the impact projects would better reflect participants' learning experience than the net financial value. The realized financial value measures the actual financial results achieved, whereas the net financial value measures potential financial value upon completion. Reflecting on why I failed to prioritize utilizing the realized financial value in the ROI implementation plan, I attributed this oversight to my inexperience in conducting ROI analyses. Additionally, the importance of the findings for both the premiere client and Learn² led me to lean towards the most beneficial outcome.

However, I ultimately decided to use the realized financial value data in the analysis and reporting to the premiere client, as it aligned with my values and the premiere client's expectations. Further analysis revealed that the completion rate ratio of Francophone to Anglophone people leaders who completed the six additional coaching sessions was 35% higher for Francophones (89% to 54% respectively). I concluded that this difference likely resulted from fewer learning opportunities available in French, making the additional coaching sessions in their first language more appealing.

In summarizing my learnings from the critical evaluation and assessment of quantitative data from the **impact projects**, I gained insights into quantifying coaching effectiveness, particularly in financial terms. This experience impacted my coaching practice, better equipping me to assist future clients in confidently evaluating and measuring the effectiveness of their learning programs, including coaching interventions.

In critically reflecting on my feelings about my learning journey, **where I utilized impact projects to evaluate and quantify the effectiveness** of the Foundations programs and coaching interventions within an organization, I felt a profound sense of **pride** and **accomplishment**. This achievement was especially significant given my initial doubts and fear about producing quantifiable outcomes for coaching interventions and leadership programs. Overcoming these doubts and demonstrating measurable financial results underscored the validity and impact of my coaching approach, further solidifying my confidence and commitment to this methodology.

I will now critically reflect on and analyze my professional and personal experiences to evaluate and quantify the outcomes that the Foundations programs, with additional coaching interventions, had on leadership development capabilities, to inform my claim for credit.

LEVEL 3 PROFESSIONALS AND LEVEL 4: PEOPLE LEADERS RESULTS – USING LEADERSHIP DEVELOPMENT CAPABILITIES

Similar to the analysis above using the impact projects, I critically appraised, determined and compared the data on **acquired leadership development capabilities** for both consolidated and by-level groups. People leaders who received six additional coaching sessions showed greater quantifiable outcomes than professionals who did not receive additional coaching. This conclusion was based on the financial value calculated using a modified formula from Phillips' article (2007), which involved multiplying the **median salary** by the **net attribution** participants assigned to their newly acquired leadership capabilities (Evidence - LA1LO3.7 Calculation of Leadership Development Capabilities p. 18). **Table 2** below shows the financial outcomes of their acquired leadership development capabilities by level and consolidated.

The consolidated financial outcome of the leadership development capabilities was \$18,750 greater (\$75,861 vs. \$57,111) for the group that received additional coaching compared to the group that did not. This trend was consistent when analyzing and comparing by level: the CP2 group that received additional coaching had outcomes of \$6,227 greater than the CP2 group without coaching and \$12,523 greater for the CP3 groups.

Table 2: Financial Outcome of Acquired Leadership Development Capabilities

Financial Outcome	With additional coaching (People Leaders)			No additional coaching (Professionals)			Difference		
	CP2	CP3	Total	CP2	CP3	Total	CP2	CP3	Consolidated
	\$32,303	\$43,558	\$75,861	\$26,076	\$31,035	\$57,111	\$6,227	\$12,523	\$18,750

In critically reflecting on and examining the cause of these financial outcomes, I determined that since the median salaries were identical across each level, the variation in the findings was due to the net attribution that participants allocated to their overall learning experience. This experience included the in-class training component of the Foundations programs, two coaching sessions and, where relevant, six additional coaching sessions. Upon further analyzing and comparing the consolidated and by level net attribution of participants' overall learning experience, I found that the groups (CP2 and CP3) who received additional coaching assigned a net attribution of 10% more to their learning experience than the group that did not (43% vs. 33%). When contrasting by level, the CP2 and CP3 groups with additional coaching reported a net attribution of 8% (43% vs 35%) and 12% (43% vs 31%) higher, respectively (Evidence – LA1LO3.4 Calculations for L3 L4 and L5).

These findings are crucial for future clients as they clearly demonstrate that incorporating coaching interventions into leadership development training results in, on average, 10% greater acquisition of leadership development capabilities.

When analyzing and comparing the leadership development data from all 47 interviewees, the consolidated and by level outcomes for the group with additional coaching were greater in all metrics, including net attribution, financial outcome and ROI, except for the confidence in attribution by the CP2 professionals who did not receive coaching. Unlike the previous analysis using impact projects, the confidence level (89%) did not correlate with the corresponding attribution (39%) for this group. Although I could not identify a clear cause, this anomaly did not affect the overall findings, which consistently showed greater quantifiable outcomes in leadership development capabilities for the groups that received additional coaching (Evidence – LA1LO3.4 Calculations for L3 L4 and L5).

Reflecting on the net attributions identified by all groups in the ROI pilot, I was surprised by what I appraised as high attribution rates of their learning experience on their leadership development capabilities six months after their experience. I ensured participants understood the question by asking in multiple ways. The consistency in responses reinforced the reliability of these high attribution rates and highlighted the significant impact of the overall learning experiences and additional coaching sessions on their leadership development capabilities.

In reflecting on and examining **what went well**, I recognized the benefit of having a favorable parity in the percentage of overall professional and people leader respondents from which the quantitative findings were drawn. The response rates ranged from 43% to 81% across the people leaders who completed the six additional coaching interventions. I learned that, due to my inexperience in implementing an evaluation methodology, I had not initially considered parity in respondents as a critical factor in the evaluation process (refer to Learning Area 1, Learning Outcome 2 for details). This oversight could have posed a significant challenge to the validity of the outcomes if there had been an imbalance in respondent ratios. Recognizing the importance of respondent parity was a critical learning point for my coaching practice, highlighting the need for balanced representation to ensure the credibility and accuracy of evaluation results.

Reflecting on my feelings at the conclusion of the ROI pilot, I felt a deep **sense of pride** in having quantified the economic value of participants' learning experiences, especially knowing from my academic underpinning the inherent challenges in doing so, as noted by Fillery-Travel and Cox (2018, p. 520). In critically considering **what else went well**, I believed that, as stated above, the premiere client was pleased with the financial outcomes, with my strategic point of contact (AP) reporting a financial outcome of over \$36,000 (Evidence - LA1LO3.8 Premiere Client Final ROI Report). However, following a conversation with said individual (AP), I learned that they only reported a fraction of the ROI findings to the senior leadership team. This decision left me feeling a mix of disappointment and understanding. While initially disheartened that the full extent of our successful outcomes would not be shared, I understood the need to tailor communication for different stakeholders, ensuring the message was relevant and impactful.

In critically reflecting on and examining **what did not go well**, there were discrepancies between the report delivered by my strategic point of contact (AP) on January 17, 2023, and the final report I produced on July 17, 2023, once all six coaching sessions and interviews were completed. These discrepancies will be elaborated on later in the learning outcome. Additionally, in critically considering **what else did not go well**, I concluded that my strategic point of contact (AP) only had access to the preliminary quantitative data, as not all participants had completed their additional coaching sessions. This resulted in a discrepancy between the reported and final comparative ROI (\$36,000 vs \$38,000) (Evidence – LA1LO3.4 Calculations for L3 L4 and L5). In assessing the impact of these discrepancies, I determined that the difference did not alter the overall message and interpretation of the findings in the ROI report but underscored the importance of having complete data before making final presentations and decisions. This experience marked my coaching practice, reinforcing the necessity for thorough data collection and validation in ensuring accurate and reliable reporting for future clients.

In summary, I acquired the skill to critically evaluate, quantify and compare outcomes from acquired leadership development by discerning between groups with and without additional coaching. By adapting Phillips' (2007) formula, I revealed significant financial advantages and increased attributions to learning and behavioural change in the coached groups. This critical reflection on this learning will significantly enhance my credibility, competence and knowledge, equipping me with compelling evidence to advocate for customized coaching solutions. This will drive more effective and targeted leadership development initiatives for future clients, especially those heavily investing in such activities but lacking awareness of their effectiveness. By demonstrating a proven ability to quantify and compare leadership development outcomes, including coaching programs, I can offer valuable insights and strategies that highlight the tangible benefits of coaching interventions, thereby elevating my practice and reinforcing my expertise in this area.

In reflecting on my feelings about my learning at that point, I felt a profound sense of **accomplishment** and distinction, recognizing that this knowledge could set me apart from other coaches while providing a valuable solution to future clients. Equally important, understanding quantifiable outcomes aligns with my beliefs and values, significantly bolstering my confidence and sense of fulfillment in my coaching approach.

LEVEL 5 ROI

Having critically evaluated, quantified and compared the financial outcomes of the Foundations and coaching programs through **impact projects and acquired leadership development capabilities**, I will now further **evaluate, quantify and contrast the ROI** of the Foundations programs **with and without additional coaching interventions**, using quantitative data from both the impact project and leadership development capabilities.

When the ROI pilot was announced on July 5, 2021, (refer to Learning Area 1, Learning Outcome 1 for details), the **initial goal** was to determine the ROI of the Foundations programs. However, after deciding to invest in additional coaching on November 29, 2021, the client's interest expanded to explore the effects of additional coaching on the ROI. In evaluating and comparing **the ROI from the impact projects and leadership development capabilities, both by average and by level**, I found that the ROI for the groups receiving additional coaching **was higher** than for those that did not. **Table 3** below illustrates the ROI for both the impact project and leadership development capabilities, by level and consolidated.

The **average ROI** of the **impact project** from the groups (CP2 and CP3) that received additional coaching was **10.01 times greater** than the ROI of the groups that did not receive additional coaching. For **leadership development capabilities**, the **average ROI** from the same groups was **0.87 times greater** than that of the groups without additional coaching (Evidence - LA1LO3.4 Calculations for L3 L4 and L5).

Table 3: ROI Measured by Impact Project and Leadership Development Capabilities

ROI	With additional coaching (People Leaders)			No additional coaching (Professionals)			Difference		
	CP2	CP3	Average	CP2	CP3	Average	CP2	CP3	Average
Impact project	8.56	17.00	12.78	2.08	3.46	2.77	6.48	13.54	10.01
Leadership development	11.05	14.38	12.72	11.04	12.66	11.85	0.01	1.72	0.87

In critically assessing and contrasting the differences in the average ROI for the impact projects and leadership development capabilities, I **concluded** that the larger average difference (10.01 times greater) in ROI for the **impact projects** was logical due to the

greater variance in realized financial outcomes. In contrast, the **smaller average difference** (0.87 times greater) in ROI for **leadership development capabilities** was attributed to the conformity in median salaries across each level.

Further evaluating the ROIs, I compared the figures in Table 3 to my academic knowledge of coaching ROI. From my master level coach training program (refer to Learning Area 1, Learning Outcome 1 for details), I knew that De Meuse, Dai and Lee identified a coaching **ROI of 1.27** in their meta-analysis study (2009). I found that the average ROI from all groups in the pilot exceeded this 1.27 benchmark. The ROIs ranged from 2.18 times (218%) for the impact project groups without additional coaching to 10.06 times (1006%) for the impact project groups with additional coaching (Evidence - LA1LO3.4 Calculations for L3 L4 and L5).

Reflecting on how the ROI findings would be received by my strategic point of contact (AP), I anticipated potential pushback since the ROIs were significantly higher than the 1.27 benchmark I initially identified (Evidence – LA1LO3.9 Benchmark of 1.27 ROI Shared – p.4). Furthermore, based on my academic underpinning, I was aware that some studies had been questioned due to high ROI findings, as highlighted by Grant (2012).

However, comparing the pilot ROI to other studies, such as those by Anderson (2005) and Parker-Wilkins (2006), which identified coaching ROIs of 700% and 689 % respectively, I found that the leadership development with additional coaching interventions produced ROIs exceeding 700%. This reinforced the validity and effectiveness of the coaching interventions used in the pilot.

In critically reflecting on what did not go well, I concluded that due to a lack of capacity, I did not present the findings in an easy-to-digest and meaningful way. I focused on avoiding further delays in reporting the quantitative data for the ROI pilot, as the expectation to present findings by the end of 2022 had already been surpassed. In critically considering and assessing what I could have **done differently**, I discovered that I could have asked my Learn² colleagues for help, but refrained to avoid imposing additional work on them, especially since I had already taken on the ROI pilot at no additional cost to the premiere client and wanted to protect my team from further burden.

To summarize, I have developed the ability to critically evaluate, quantify and contrast the ROI of leadership development training programs, such as the Foundations programs, with and without additional coaching interventions, using quantitative data, with and without the use of results-based projects. Furthermore, I also learned to benchmark financial ROI outcomes against industry standards. This learning has significantly benefitted my coaching practice by enhancing my confidence, experience and skills, particularly given my work with the premiere client, a renowned Canadian company. This is expected to instill confidence in future clients that quantifying the ROI of learning is both achievable and customizable to their needs.

In critically reflecting on my feelings about the evaluation, quantification and comparison of the ROI of leadership development training programs and coaching interventions, I eagerly anticipate applying my experiential learning and acquired knowledge to future clients. My eagerness is heightened by the prospect of integrating my learnings and addressing any gaps in my knowledge, further refining and enhancing my coaching practice.

ROI OF COACHING VERSUS ROI OF LEADERSHIP DEVELOPMENT TRAINING PROGRAMS

To determine the effectiveness of coaching interventions, I extended the scope beyond the premiere client's initial needs for the ROI pilot. I isolated, analyzed and compared the quantifiable outcomes of coaching interventions against those of the Foundations programs for the three people leader groups that received additional coaching. In almost all cases, coaching interventions produced greater financial returns than the in-class training component of the Foundations programs (Evidence - LA1LO3.4 Calculations for L3 L4 and L5).

In critically reflecting on and comparing the **ROIs for the impact projects**, I found that coaching delivered a greater ROI than the in-class Foundations programs, both on average and by level. Coaching interventions produced an ROI of **117.00 times** the investment, compared to **35.04 times** the investment for the Foundations programs. Similarly, for **leadership development capabilities**, coaching interventions produced an **ROI of 46.73 times** the investment, compared to **8.85 times** the investment for the in-class training (Evidence - LA1LO3.4 Calculations for L3 L4 and L5).

The only instance where the in-class programs yielded a greater outcome was the average realized financial outcome, \$85,878 compared to \$66,079 for coaching interventions (Evidence - LA1LO3.4 Calculations for L3 L4 and L5). In critically considering the reason, I concluded that participants may have assessed the Foundations programs as having a greater contribution because the concept of an impact project was introduced during these programs and was a significant part of the curriculum.

Evaluating the varying ROIs, I concluded that this experience and insight significantly enhanced my coaching practice with future clients. I can now make a compelling case for coaching interventions as a supplement to or a replacement for in-class leadership development training programs, given their potential to deliver an ROI ranging from **21.81 to 81.57 times the investment**. These superior financial returns are attributable to the higher effectiveness and lower cost of coaching interventions.

FINAL THOUGHT

Having critically evaluated and quantified the effectiveness of coaching interventions, I concluded that, despite certain challenges, the principle that coaching programs can produce quantifiable outcomes, including a financial ROI, has been upheld. Furthermore, the quantifiable outcomes from coaching interventions can be leveraged to measure and compare their effectiveness against other learning and development programs within an organization.

After critically analyzing my coaching practice and the knowledge gained from this learning outcome, I now have the experience and expertise to work with future clients to evaluate, quantify and compare the effectiveness of coaching and other learning programs, thus enhancing the value of their investments in leadership development.

I hope I have effectively demonstrated my ability to critically evaluate and quantify the effectiveness of coaching interventions within an organization, based on the principle that coaching programs can produce quantifiable outcomes. I trust that this learning outcome will sufficiently support my claim for credit.

SUMMARY OF THE FIVE EVALUATION LEVELS

LEVEL	EVALUATION LEVEL	DESCRIPTION
1	Reaction	Participant feedback and ratings of the Foundations and coaching programs
0 & 2	Pre and post program behaviour	Participant and leader quantifiable assessment of behaviours prior to and following the Foundations programs and two coaching sessions
3	Results - Professionals	Professional participant economic value of Foundations programs and two coaching sessions
4	Results – People Leaders	People leader participant economic value of Foundations programs and eight coaching sessions
5	ROI	Net financial benefit of investment in Foundations programs and six additional coaching sessions

ROI CALCULATION

$\text{ROI} = \frac{\text{Total value improvement} - \text{Total program cost}}{\text{Total program cost}}$

Learning Area 1: Research, design and evaluate coaching effectiveness within an organization through the use of coaching principles.

Learning Outcome 4:

Critically review and apply the use of coaching principles to support the development of people within an organization

Principle: Coaching relationship and boundaries are critical

INTRODUCTION

To demonstrate the extent of my experiential learning in coaching principles, I will undertake a critical analysis of my professional and personal experiences. This analysis will focus on the fundamental principles of the coach-coachee relationship and the importance of clearly defined boundaries, aiming to inform my claim for credit.

In 2016, while pursuing my **Registered Corporate Coach™** (RCC™) designation from the Worldwide Association of Business Coaches (**WABC**), a professional coaching body, I first learned about coaching competencies. The training program, provided by the People Dynamics Advantage Group Inc., included 18 weeks of two-hour in-class theory sessions, weekly readings and reflections, assignments, self study, 30 hours of coaching practice and three one-on-one coach mentoring sessions (refer to Curriculum Vitae for details).

A key coaching principle I learned, which has since informed my practice, pertained to the **coach-coachee relationship**. This principle emphasized the importance of establishing a connection between the coach and the coachee (Evidence - Coach Coachee Connection – p. 7 & 15). Through readings, reflections and group discussions led by the coach instructor, I learned that building this relationship required skills such as connecting, relating and establishing rapport with the coachee.

The textbook used in the coaching program was the training company's self-published book, which served as preparation for the virtual class discussion (Sinclair and Greenaway, 2013). Using their 5C coaching model (Evidence - LA1LO4.2 RCC 5C Coaching Model), I learned the importance of first establishing a connection with the coachee before proceeding to the next stage of a coaching conversation.

I immediately applied the 5C coaching model and focused on building a connection with my coachees as part of this initial coach training program. Based on my 40.5 hours of coaching practice, I developed a personal learning plan based on, among other competencies, my assessment of my ability to connect with coachees.

In critically reflecting on my connection skills at the time, I discovered through a **10-point** self-assessment scale that I had overestimated my ability to connect with coachees. (Evidence - LA1LO4.3 RCC Competency Self Assessment). I learned that building a connection was more challenging **than** I had initially imagined. My reflection revealed that I had assumed that my general ability to establish strong relationships would naturally extend into the coaching context. This experience taught me the importance of not taking my ability to create quality connections with coachees for granted, highlighting that competencies effective outside the coach-coachee context do not necessarily translate seamlessly into the coaching environment.

Further examining why I wasn't establishing connections with coachees as effectively as I did outside the coaching context, I discovered that my focus was misdirected. My primary goal was to establish myself as a credible coach and demonstrated the value I could bring to the coachees. This realization prompted a significant shift, redirecting my attention from myself to the coachees. Consequently, I began to listen more intentionally, staying present in the moment rather than thinking about my next question or how I could prove my value.

In assessing my coaching practice, I remained aware of my tendency to want to showcase my value in the coaching relationship. With that awareness, whenever I noticed my focus shifting back to myself, I reminded myself of Dr. Peggy Marshall's advice. In 2020, during her coach training program where I earned my Certified Business Coach™ (CBC™) designation from the WABC, Dr. Marshall, during our 10 hours of coach supervision, sensed that I was constantly searching for ways to add value to the coachees. She suggested that **"I was the tool"** that added value. This insight has since become a pivotal reminder for me to shift my attention away from myself and onto the coachee, facilitating a more effective coaching relationship.

Over the course of my practice, driven by a systematic approach to placing the focus on the coachee, I implemented a process wherein all new clients are requested to complete the "Values in Action" strength inventory prior to our first coaching session (VIA Institute on

Character, 2024) (Evidence - LA1LO4.4 Coaching Notes – VIA Survey Integration). This method emerged from my continuous evaluation of different approaches to establishing an effective relationship with coachees. It provided a preliminary assessment of the coachee's level of commitment and enabled them to gain immediate self-insight, thus alleviating my immediately need to prove my value.

My academic foundation in the coach-coachee relationship principle deepened during my 2021 coach training program with Dr Peggy Marshall, where I pursued the WABC **Certified Master Business Coach™** (CMBC™) designation. Details on how I acquired this knowledge will be elaborated below. During this program, I gained insights from literature, revealing that studies, according to Williams (2023), did not unanimously regard the coach-coachee relationship as a definitive indicator of coaching outcomes. This nuanced understanding emphasized the complexity and multifaceted nature of effective coaching relationships and informed my practice.

Reviewing and analyzing various academic perspectives, I determined that, although the value of the coach-coachee relationship was not universally recognized, it remained a crucial principle in my coaching practice. I **felt relieved** knowing that even if a relationship with a coachee was not fully established, the coaching outcome could still be favourable. Research in industrial-organizational psychotherapy, which was relevant to coaching due to their similar processes, supported the view. McKenna and Davis (2009) identified the coachee themselves as the single greatest determinant of coaching outcomes, with key factors including readiness to change, level of commitment, motivation and openness to feedback, which they termed as “active ingredients”. These factors contributed to coaching outcomes as follows:

- 1) Client (40%)
- 2) The relationship or alliance (30%)
- 3) Placebo or hope (15%)
- 4) Theory and technique (15%)

In critically examining on the relief I previously mentioned, I discovered that I had assumed full responsibility for establishing the **coach-coachee relationship**. Through academic

underpinnings, I learned that this relationship is a shared responsibility. Analyzing my competencies as a coach revealed that when a connection with a coachee was not established, I took it **personally, negatively impacting my confidence**. I interpreted the lack of connection as a **rejection of my abilities**. For instance, if a potential client did not select me, I judged their decision as a reflection of my inadequacy as a coach.

However, after learning from evidence-based literature, I understood that if a coachee chose to suspend our coaching sessions, it was not necessarily a reflection of my abilities. Various factors could influence their decision, as identified above. This learning alleviated the pressure I felt to perform or add value, allowing me to focus more on the coachee rather than on myself and my coaching competencies. Feedback from coachees reassured me that I was generally successful in building relationships characterized by rapport, trust and value (Evidence – LA1LO4.5 Coachee Feedback – Q9 & Q10).

Having critically reflected on my coaching experience and explored my learnings pertaining to the principle of establishing a coach-coachee relationship, I will now analyze my coaching practice based on the specific principle of **boundaries** within the coach-coachee relationship to identify experiential learning that will inform my claim for credit.

BOUNDARIES

I first learned about the principle of establishing boundaries within the coach-coachee relationship during my initial coach training program while pursuing my WABC RCC™ designation, as detailed above. During this training, I learned about the **WABC business coaching competencies**, which were divided into **three areas** (Evidence - LA1LO4.6 WABC Competencies - 3 Areas):

1. Self-management
2. Core coaching skills
3. Business and leadership coaching capabilities

The competency of boundaries fell under **self-management**. Reflecting on and analyzing my use of boundaries within my coaching practice, I concluded that, at the time, I devalued and deprioritized boundaries as a competency for two reasons. **Firstly**, because the principle of boundaries was referred to as **limitations**, I saw them as a restriction on my growth and development. My focus was on acquiring knowledge and building my coaching

practice, and the concept of limitations had a negative connotation, as I equated limitations with constraints, conflicting with my value of pursuing excellence.

Second, I believed that my previous experience working in high performance sport, where self-management was crucial for athletes, already equipped me with this ability. However, upon further reflection, I discovered that my self-management skills did not seamlessly translate into the coaching environment, similar to my earlier assumption about my ability to establish relationships.

During my initial coach training, I prioritized acquiring knowledge and building my coaching practice. I learned that I valued **core coaching skills**, such as focusing on goals, promoting action and questioning effectively, more highly than the competency of establishing boundaries. These skills appeared more tangible and aligned with coaching excellence, making them seem more important to my practice.

From 2016 to 2021, I did not encounter any circumstances in my coaching practice that made me question my boundaries, so I did not see the need to further my knowledge of coach-coachee boundaries. This aligned with **Knowles' andragogy principles** (1978, p. 71) which stated that adult learning is driven by a need to know, self-direction, the impact of experiences, a need for learning, problem-solving and intrinsic motivation.

The need to acquire additional knowledge about coaching boundaries emerged in 2021 when I began my master coach training program with Dr Marshall in pursuit of the WABC CMBC™ designation. It was then that I learned about **the importance and benefits of setting boundaries**.

This advanced learning occurred in a manner similar to how I acquired knowledge about the theoretical perspectives of coaching, different genres of coaching and professional practice issues. The program consisted of **20 weeks of in-class virtual sessions**. For each two-hour session, I prepared by reading and reflecting on two chapters from *The Sage Handbook of Coaching* (Bachkirova et al., 2017) which was replaced six weeks later by *The Complete Handbook of Coaching* (Cox et al., 2018).

Dr Marshall facilitated the sessions, where I and my peers shared our perspectives, learnings, agreements, disagreements, curiosities and how our learnings would influence our coaching practice. At the conclusion of each class, Dr Marshall would supplement our

knowledge with peer-reviewed academic articles. To complete the program, I undertook a **research project** and submitted **three reflective assignments** totalling approximately 7,500 words.

IMPACT OF MENTAL HEALTH ON BOUNDARIES

In **Week 17** of my master coach training program, the focus on coach-coachee boundaries, prompted me to re-evaluate the importance of establishing boundaries within my practice. Preparing for the class discussion on June 28, 2021, I immediately recognized the urgency of establishing boundaries within my coaching practice, especially in the context of mental health. The literature and ensuing discussion highlighted the **prevalence** of mental health issues within the general population and the **duty of care** coaches have. This led me to conclude that establishing coaching boundaries was a critical professional practice issue based on the following:

- The **Australian Bureau of Statistics** (2008) identified that up to 45% of the population had been diagnosed with a mental health issue during their lifetime.
- The similarity between Canadian and Australian societies made the study relevant to my coaching practice, as the vast majority of my coachees were Canadian.
- My deep sense of **duty of care** for my coachees, their employing organizations, Learn² (the company that contracted me), the coaching profession and the general public reliant on coaching.

Reflecting on my learnings about coaching and mental health, I integrated three reflective questions developed by Cavanagh and Buckley (2018, p. 453) to assess whether my coaching boundary had been compromised.

1. Can my coaching help?
2. What are my limitations with this issue?
3. What is in the best interest of the client?"

This understanding of the coach's duty of care in relation to clients with potential mental health issues was transformative. I wrote about it in my third reflective assignment as a professional practice issue in coaching (Evidence - LA1LO4.7 Coaching and Mental Health - 2021 - p. 3 & 4).

Since acquiring the knowledge about boundaries and mental health, I had **not encountered** a coaching situation that tested the coach-coachee boundary. However, reflecting on my learning about boundaries, I recognized a significant positive shift in my perspective. I transformed my belief from viewing boundaries as a negative constraint to understanding them as an essential mechanism for protect both the coach and the coachee.

My understanding of boundaries was tested toward the end of 2021, approximately six months after acquiring knowledge about coaching and mental health, I received a **call** from a **former coachee** who was in tears, explaining that they had received a below-expectation evaluation on their annual performance review and were in conflict with their supervisor. Additionally, their employer's new return-to-office policy posed a health risk due to their immunocompromised condition. The former coachee said that they reached out to me because of the strong relationship we had developed during the previous year's leadership development and coaching program.

Reflecting on and objectively analyzing the call, I identified both **positive and negative aspects** of how I managed the conversation. From a positive perspective, I felt proud that my former coachee felt comfortable and emotionally safe enough to reach out to me, even a year after our coaching sessions had ended. Consistent with Bluckert's findings (2005, p. 339) which stated that "for the client, trust enables them to feel safe", I concluded that a critical reason for my former coachee reaching out was because they saw me as trustworthy.

In reviewing and analyzing the conversation, I recognized that what I also **did well** was to effectively **shift my focus** away from myself and the sense of responsibility I felt, especially when they appeared acutely vulnerable and distressed. Earlier in my coaching career, moving the focus away from myself had been a challenge, but my increased confidence and experience allowed me to concentrate on **listening** keenly.

Drawing on my academic knowledge of coaching and mental health, **what I also did well** was utilize Cavanagh and Buckley's reflective questions (2018) to assess my boundary with my former coachee. Specifically, the second question, which prompted an evaluation of my limitations regarding the issue at hand, led me to recognize that I had exceeded my knowledge and expertise. My **former coachee** was highly emotional and likely experiencing an acute mental health issue, a situation beyond the scope of my coaching experience.

Reflecting on and examining this call, I discovered a **gap** in my knowledge and skills since, based on the statistics above, I would likely face other coachees with mental health issues. I recognized the need to be better prepared to support coachees through emotional experiences.

In the future, I must further develop my practice to effectively support coachees during emotional experiences by acquiring additional knowledge about coaching models. This will allow me to apply, test and familiarize myself with various models before a real-world need arises.

Reflecting on and analyzing the use of boundaries in my practice up to that point in my career, I concluded that I had primarily integrated mental health boundaries. What I **did not do well** was identify **other forms of coaching boundaries**. Additionally, I discovered that there were instances throughout my coaching practice where I experienced feelings of discomfort when I reached the limits of my boundaries, whether in terms of knowledge or experience. This experience aligns with Bandura's concept of "**self-efficacy**" (1977), as it highlights the influence of one's beliefs in their abilities on their emotional and physiological states.

In the future, I need to further assess where to focus my continuous learning and development. This will involve evaluating whether to deepen my expertise as a performance coach (refer to Learning Area 1, Learning Outcome 1 for details) or broaden my knowledge and experience to expand my boundaries. This strategic decision will be critical in enhancing my overall effectiveness and adaptability as a coach.

BOUNDARIES EXPERIENCED AT LEARN²

To further demonstrate my experiential learning in relation to the outcome of critically reviewing and applying coaching principles to support the development of people within an organization, I will now undertake to further analyze my professional and personal experiences. This analysis will focus specifically on my role in fostering employee development within the Learn² organization, thereby informing my claim for credit.

Prior to being contracted by Learn2 as a coach and facilitator in August 2019, my coaching mandates were limited to **one-on-one individual business coaching**. My first foray into organizational coaching occurred while I was pursuing my coaching designations, as

outlined above. From 2017 to 2019, I served as the Director General of the Montreal Tour of Champions. The homogeneous Board of Directors hired me primarily for my business acumen, leadership skills and event hosting experience; my coaching competencies were not recognized as an asset.

In reflecting on and critically assessing how the use of coaching principles could have supported the development of individuals within the Montreal Tour of Champions organization, I concluded that the absence of coaching principles was indeed detrimental. The Board of Directors, who valued a top-down commanding leadership style, did not support or align with a coaching culture I was creating. This lack of alignment hindered the application of coaching principles and ultimately impeded the development of individuals within the organization.

From my experience with the Montreal Tour of Champions, I learned that I had integrated coaching principles into both my coaching practice and my approach to leadership development. I discovered that this experience underscored the necessity of being selective with clients in the future, ensuring they valued and intended to leverage my coaching expertise for leadership development. This realization brought me to Learn².

While under contract with the Montreal Tour of Champions, I had occasionally been engaged by Learn² to facilitate their leadership development programs for their premiere client. When my relationship with the Montreal Tour of Champions concluded, **Learn²** promptly contracted me in August 2019. My role expanded to include facilitating leadership development programs for its premiere client, as well as providing coaching services to both external clients and internal team members (refer to Job Description: Learn² for details). This marked my inaugural experience as a coach within an organizational setting.

In reflecting on my experience with Learn² and critically reviewing and applying the use of boundaries as a coaching principle, I identified two instances where my boundaries were tested. The first instance involved a Francophone/bilingual team member who happened to be my daughter (KO), and the second involved Learn²'s owner and founder (DB), whom I had known for many years and who was instrumental in contracting me. The experiences are critically analyzed below.

FIRST EXAMPLE WHERE MY BOUNDARY WAS TESTED (KO)

In order to demonstrate the breadth of experiential learning I acquired in relation to the principle of establishing a coach-coachee boundary, I will first look to critically analyze my professional and personal experience, pertaining to my daughter (KO).

As the Francophone/bilingual program assistant for our premiere client, my daughter was contracted by Learn² on a seasonal basis to support the delivery of leadership development and coaching programs. Reflecting on my coaching experience with her prior to her joining Learn2, I had already explored and tested the coach-coachee boundary. I had determined that, as her mother, my inability to remain objective compromised the quality of my coaching, indicating that I had exceeded my boundary. Brennan and Wildflower (2018, p. 507) underscore the "potential ethical concern" inherent in coaching family members, warning that such practices could lead to unfavorable outcomes.

In reflecting on and assessing my experience with my daughter, I wrongly concluded that respecting my coaching boundary with her would **not be challenging**, given that it had been tested prior to her joining Learn². I **misjudged** the difficulty of withholding coaching from her, primarily because there was no alternative solution; she did not have access to another coach who could support her development within the organization.

Upon reflecting and analyzing my coaching experience with my daughter, I learned that I had a **gap** in my knowledge in that I lacked the theoretical underpinning to manage what I perceived as a boundary-related coaching **dilemma**. While recognizing that boundaries were essential to protect both coach and coachee, the absence of an alternative coach presented a significant challenge. How could I support the development of the Francophone/bilingual program assistant for our premiere client while maintaining professional boundaries?

I concluded that I needed to acquire additional knowledge and test how to coach within the coach-coachee boundary when it was in the best interest of both parties. My boundary, as it stood, did not seem to serve her (KO) or me. The feeling of discomfort I previously mentioned resurfaced, manifesting as guilt over withholding my coaching services from an integral team member. In these instances, I chose not to coach but listen and support her as her mother.

Reflecting on and analyzing how I could have better navigated the experience with my daughter, I recognized the value of seeking support from a coach peer or coach mentor such as through **coach supervision**. Additionally, I could have consulted the coaching literature and conducted research to acquire further knowledge to guide me to better manage the coaching boundary dilemma with my daughter more effectively.

This critical analysis highlighted the complexities of maintaining coach-coachee boundaries within familial relationships and underscored the importance of acquiring additional knowledge when navigating such challenges.

SECOND EXAMPLE WHERE MY BOUNDARY WAS TESTED (DB)

To demonstrate the experiential learning I acquired regarding the principle of establishing a coach-coachee boundary to support the development of individuals within an organization, I will critically analyze an experience involving Learn²'s **owner and founder** (DB).

Shortly after joining Learn² in August 2019, I received a meeting request from the owner and founder (DB) entitled "**Coaching**". The ambiguity of this request left me uncertain about its intent, as Learn² fostered a culture of coaching. It was unclear whether I was expected to provide coaching or receive coaching from the owner and founder.

In reflecting on the meeting request, I concluded that I would attend but refrain from providing coaching to the owner and founder (DB), as doing so would **compromise my coach-coachee** boundary and effectiveness as a coach. This decision was based on several factors.

Firstly, my longstanding relationship with the owner and founder (DB), spanning over **twenty years**, had significantly influenced my **professional development**. This familiarity would impede my ability to remain objective as a coach. Secondly, being privy to the owner and founder's (DB) personal situation and having previously recommended that he seek counselling or psychotherapy, I assessed that the support needed exceeded my coaching expertise.

Additionally, at the time of the meeting request in 2019, I had only earned the first level WABC designation, Registered Corporate Coach™. This lack of advanced knowledge and experience undermined my confidence in my coaching abilities, causing self-imposed

pressure to perform. In reflecting on the source of this pressure, I discovered that it stemmed from my fear of not meeting expectations and potentially jeopardizing my contract with Learn². I assessed the risks and determined that the expectations of the owner and founder (DB) were beyond the boundaries of my knowledge and experience.

Lastly, since I was feeling uncomfortable and was not looking forward to the meeting, I assessed that those feelings of discomfort and reluctance to engage in the meeting further indicated that I was approaching the limits of my professional boundaries. For those reasons, I concluded that if I were expected to provide coaching, I would not engage in the meeting in a coaching capacity. Instead, I would listen and offer support to the owner and founder (DB) as a colleague and friend, ensuring that my professional integrity and that my coaching effectiveness would not be compromised.

In critically reflecting on and analyzing the experience with the owner and founder (DB), I concluded that the gap in my knowledge and ability to manage a coaching situation when boundaries were compromised mirrored the gap I experienced with my daughter (KO). I recognized the importance of addressing these gaps, I acknowledged the need to acquire additional knowledge through literature review, coach mentoring or further coach training programs to better manage coaching situation involving coach-coachee boundary dilemmas.

Upon assessing my experience with the owner and founder (DB), I concluded that what I could have **done differently** was to be transparent by openly communicating my concerns about the potential boundary issue. I should have practiced what I would advise a coachee in a similar situation which was to engage in open and honest dialogue.

As a final reflection on the learning outcome to critically review and apply the use of coaching principles to support the development of people within an organization, I had identified one final assessment of my coaching practice. In 2016, at the inception of my coaching journey, I eagerly sought any opportunity to practice my coaching skills and apply my knowledge. This led me to engage in as many coaching conversations as possible, even at the expense of compromising my coach-coachee boundary, particularly when coaching family and friends.

Reflecting on my experiential learning, I recognized that I initially prioritized the **quantity of coaching over the quality**, which may have also contributed to my reluctance to establish boundaries. However, after eight years as a business coach, I have developed greater comfort and confidence in my competencies and capabilities. Consequently, I have become more selective in whom I coach, shifting my priority towards providing quality coaching over merely increasing the number of coaching engagements.

This evolution in my approach underscores my growth from prioritizing the quantity of coaching engagements to valuing their quality. By focusing on delivering high-quality coaching, I ensured that both the coach and coachee benefit from a professional and objective relationship, maintained within mutually beneficial boundaries. This shift highlights my commitment to fostering impactful and meaningful coaching experiences, enhancing the development and performance of individuals within an organizational context.

In critically analyzing my experience and the breadth of learning acquired in relation to the relationship and boundary principles between the coach and coachee, I believe that I have demonstrated my ability to rigorously review and apply coaching principles to support the development of individuals within an organisation, which, I hope, will serve to adequately make my claim for credit.

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Learning Area 2: Introduction (40 credits)

LEARNING AREA 2: Research, analyze and assess coaching effectiveness at navigating the complexities of the phase that is known as the "messy middle" in relation to performance.

The intent of this learning area is to critically examine and analysis my experiential learning through an evaluation of my professional and personal experience. This examination will be conducted within the framework of factors that either facilitate or impede performance leading up to, during and moving through the "messy middle" (Brown, 2015, p. 26-28) of performance. This analysis aims to substantiate my claim for 40 credits.

Learning Outcomes

1. Critically research and evaluate various established methodologies and academic literature pertaining to the "messy middle" (Brown, 2015, p. 26-28) of performance.
2. Critically analyze and assess the applicability of methodologies and academic literature concerning the "messy middle" (Brown, 2015, p. 26-28) of performance in practical contexts through an inquiry with a range of individuals.
3. Critically analyze and further develop my coaching practice by integrating critical insights from both the theoretical and practical learning of the "messy middle" (Brown, 2015, p. 26-28) of performance.

These three learning outcomes, encompassing literature review, applicability and integration into my coaching practice, scrutinize the critical factors that enable or hinder performance in preparation for, during and moving through the "messy middle" (Brown, 2015, p. 26-28).

As detailed in my curriculum vitae, during my master level coach training program, I conducted a study that integrated both desk-based and practical inquiry research to identify and assess factors that enabled or hindered performance at a specific point in time during the pursuit of a goal. The study, entitled "What Derails Performance in the "Messy Middle"?"

(Brown, 2015, p. 26-28), was divided, examined and evaluated based on the following phases:

- How are people prepared going into this phase?
- What do people do once they are in this phase?
- How do people move through this phase?

For context, within this learning area, the term “performance” is synonymous with setting a goal and striving to achieve that goal. The term “messy middle” popularized by Brown (2015, p. 26-28), describes the phase in an individual’s journey where progress becomes challenging. This term will be detailed in Learning Outcome 1.

Throughout the three learning outcomes, reference will be made to factors that enabled or hindered performance. The 19 factors identified are outlined in the table below.

Factors related to the “messy middle” of performance			
1. Importance of goal	6. Alignment of work and life	11. Energy Management	16. Reflection
2. Mini-goals	7. Passion / Purpose	12. Stress Management	17. Positivity
3. Commitment to goal	8. Autonomy	13. Plan for slips / challenges	18. Stretching beyond comfort zone
4. Confidence	9. Habits	14. Reward / celebration	19. Identity
5. Competing Priorities / Commitments	10. Fun	15. Social Network	

Learning Area 2: Research, analyze and assess coaching effectiveness at navigating the complexities of the phase that is known as the "messy middle" in relation to performance.

Learning Outcome 1:

Critically research and evaluate various established methodologies and academic literature pertaining to the "messy middle" of performance.

To demonstrate the depth of my **experiential learning** acquired through researching and evaluating various methodologies and academic literature related to navigating the complexities and challenges of the "messy middle" (Brown, 2015, p. 26-28) of performance, I will critically analyze my experience to substantiate my claim for credit.

INTEREST IN PERFORMANCE

From 2016, when I initially underwent my first coach training program in pursuit of my Registered Certified Coach™ (**RCC™**) designation from the Worldwide Association of Business Coaches (WABC), until 2019, I did not have a **preference for specific coaching** methodologies (refer to Curriculum Vitae and Learning Area 1, Learning Outcome 4 for details). In critically reflecting on the **root cause**, I determined that it likely stemmed from being in the **early stage** of my learning journey, where my priority was learning how to coach and understanding coaching models. At that time, I was not exposed to academic literature offering alternative coaching processes, theories or principles.

Equipped with a basic understanding of coaching, I observed a shift in my engagement and enthusiasm toward specific coaching subjects during the pursuit of my Certified Business Coach™ (**CBC™**) designation from the WABC from February to August 2020 (refer to Learning Area 1, Learning Outcome 1 for details). Amidst the 16-week coach training program, topics such as change theories, neuroscience, habits, overcoming resistance, coaching to performance and closing the knowing-doing gap captured my attention with greater interest and passion (Evidence - LA2LO1.1 CBC Coach Training Program 2020 - Overview). In critically reflecting and analyzing the underlying motivations driving my interest, I discovered that those **particular topics aligned with elevating performance**.

WORKING WITH CERTAIN COACHEES

In critically considering and examining the impact of this discovery on my coaching practice, I learned that I **preferred working with coachees who sought to enhance their performance**. Reflecting further on my thoughts and feelings, I concluded that this inclination was unsurprising as it aligned with both my **personal and professional background**, which centered on understanding why some individuals could attain a performance objective while others could not (refer to Curriculum Vitae for details). In undertaking a critical analysis of the genesis of this preference within my coaching practice, I discovered that while completing the “**think about**” assignment from Module 10, entitled “Coaching to Performance” of my CBC™ training program on April 13, 2020, I found it **challenging** to work with clients who exhibited a lack of commitment to assuming responsibility for behaviour change to improve their performance (Evidence - LA2LO1.2 CBC Challenge and Commitment of Coachees).

An example illustrating my challenge of working with coachees who did not appear committed to taking responsibility for changing their behaviour occurred with a colleague (AT) while I was an internal coach for Learn². Reflecting and assessing our coaching sessions, I discovered **two primary reasons** why I found my coachee particularly challenging. **Firstly**, I assumed that given my coachee’s employment with a learning and leadership development company, there would inherently be a strong inclination toward personal growth and development for themselves as well as for our clients. **Secondly**, after a few coaching sessions, it became evident that the coachee (AT) had not followed through on the commitments they had set for themselves as tasks between sessions. Critically reflecting on how I felt during those coaching sessions, I discovered that I felt uneasy and impatient with the perceived lack of personal accountability for behaviour change.

In reflecting on **what I did well**, I concluded that I recognized the opportunity and effectively implemented a different coaching approach due to the strength of my relationship with my colleague and coachee (AT). I tested a more assertive yet supportive coaching stance by communicating my observations regarding my perception of my coachee’s (AT) inactivity between sessions combined with their apparent lack of ownership. In critically reflecting on the evolution in my coaching practice, I assessed and identified **two areas** that I could have done differently. **Firstly**, I determined that I could have improved my coaching approach by

aligning it more closely with their state of **readiness to change**. **Secondly**, I recognized that I could have more deeply explored their **motivation** to change. The concepts of readiness for change and motivation will be analyzed later in this learning outcome.

PERFORMANCE COACH

In further reflecting on my preference for working with coachees **committed to elevating their performance**, I discovered in 2021, while pursuing my CMBC™ designation from the WABC (refer to Curriculum Vitae and Learning Area 1, Learning Outcome 1 for details), that I learned about the different genres of coaching. In preparation for one of my 20 two-hour sessions, I read and reflected on the distinct characteristics and theoretical foundations of the genre of coaching described in the chapter on “Skills and Performance Coaching” (Tschannen-Moran, 2018) in *The **Complete Handbook of Coaching*** (Cox *et al.*, 2018). Critically reflecting on my feelings upon discovering this genre of coaching, I experienced a gratifying sense of relief and clarity. This newfound understanding offered me a distinct and tangible direction for my coaching practice (Evidence - LA2LO1.3 CMBC Assignment 2021 - Interest in Performance Coaching).

In further reflecting on this genre of coaching, I discovered that, had the textbook for my master coach training program not changed from *The **Sage Handbook of Coaching*** (Bachkirova *et al.*, 2017) to *The **Complete Handbook of Coaching*** (Cox *et al.*, 2018), I would not have learned about performance coaching (see Learning Area 1, Learning Outcome 4 for details). Reflecting on the implications for my practice, I determined that I needed to acquire additional knowledge specifically pertaining to performance coaching and the factors impacting performance. Below, I will delineate how this realization constituted the foundation for this learning outcome and the study I conducted.

REQUIREMENT OF CMBC™ DESIGNATION (March 2021 – November 2023)

As a requirement for completing my **20-week program** of study for my CMBC™ designation, referenced above, I undertook a coaching-related study. Under the guidance of Dr Peggy Marshall, instructor and facilitator of my master level coach training program, I researched, determined and evaluated the factors that influenced performance in preparing for, during and moving through the phase where individuals confront obstacles on their path toward achieving an objective, referred to by Brown (2015, p. 26-28) as the “messy middle”.

I chose this topic for three specific reasons. **Firstly**, it enabled me to acquire additional knowledge essential to my role as a performance coach, mentioned earlier. **Secondly**, it provided me with the opportunity to interact with coachees dedicated to elevating performance, as previously highlighted. **Thirdly**, it aligned with my passion and curiosity about performance.

In critically reflecting on my thoughts and feelings about the subject of my study, I experienced a sense of satisfaction and eager anticipation at merging my sporting expertise and background with my coaching practice. I discovered that I often found it necessary to downplay my involvement in sport due to its perceived lack of relevance in relation to business coaching. However, upon reading Hallet and Hoffman's (2014) article on performance under pressure, which highlighted the correlations between high performance sport and coaching, and the potential for insights from sport research to enrich business practices, I felt a sense of validation.

To validate my claim for credit, I will critically analyze my professional and personal experiences by researching and evaluating various established methodologies and academic literature. This will elucidate the factors I researched, determined and evaluated that influenced performance in preparing for, during and moving through the "messy middle" (Brown, 2015, p. 26-28).

PRACTICAL STUDY

The **title** of my study was "What Derails Performance in the "Messy Middle"?". **Brown** (2015, p. 26-28) delineated the "messy middle" as "whatever that middle space is for your own process, when you're in the dark", whereas Pink (2018, p. 115) characterized it as "the midpoint when things are muddy, when you felt numb, and progress stagnates".

In critically reflecting on my research pertaining to the term "messy middle" (Brown, 2015, p. 26-28), given the limited access to academic literature, I discovered that what I **did not do well** was research this phase in a coaching context. In critically examining what was positive, I determined that I effectively transformed the ambiguous and abstract concept of performance and made it clear and tangible **by equating** it to **setting a goal** and striving to achieve that goal. I reached this conclusion upon discovering that no participant in the study

raised queries regarding the definition of a goal, which I believe they would have, had I employed the term “performance” instead of “goal” throughout the study.

In conducting desk-based research to critically analyze the challenging phase of performance, I utilized three sources to guide my research. **Firstly**, I employed and customized the peak performance assessment I co-created with Dr Peggy Marshall during our joint effort in building a peak performance course in the Fall of 2020, to be offered by the Global Institute of Organizational Coaching (Global IOC) (Evidence - LA2LO1.4 Peak Performance Assessment Collaboration). **Secondly**, I analyzed the various methodologies and academic underpinnings garnered from my CBC™ and CMBC™ programs of study. **Thirdly**, I leaned on Dr Marshall as an invaluable source of learning, imparting her knowledge, expertise and experience during one-on-one conversations mostly prior to my study.

Drawing upon these sources, I identified 19 factors associated with performance after critically researching and evaluating established methodologies and academic literature on the “messy middle” (Brown, 2015, p. 26-28) of performance (refer to Learning Area 2, Introduction for details). This learning outcome emphasizes a subset of those factors.

AVAILABILITY OF LITERATURE REGARDING PERFORMANCE AND COACHING

In conducting the desk-based research, I found ample literature on performance and goals, yet significantly less research specifically addressing goals within the field of coaching. Grant (2012) corroborated the limited availability of goal-related research within coaching. This scarcity persists despite Clutterbuck and Spence’s observation (2017, p. 221) that research into “goal setting and goal management” spans over a century.

COMPLEXITY OF LITERATURE

In assessing and critically evaluating the extensive literature on goal-setting, I concluded that while accessing such knowledge was beneficial to my practice, the absence of specificity tailored to coaching posed challenges in navigating and distilling the relevant information. An example of the abundance and complexity surrounding goals is depicted by Austin and Vancouver (1996) who identified 31 theories on goals, with Clutterbuck and

Spence (2017, p 221) further adding to the complexity by delineating the following five dimensions of goals:

1. Level of abstraction (concrete to abstract)
2. Orientation (approach to avoidance)
3. Outcome (performance to learning)
4. Temporal range (proximal to distal)
5. Regulation (controlled to autonomous)

GOAL AND BEHAVIOUR CHANGE

In critically researching and evaluating the academic literature on performance, I acquired additional knowledge into the challenges of goal achievement and the **connection between goals and behaviour change** by examining two specific articles. **Firstly**, Berkman's exploration of the neuroscience of goals and behaviour change (2018) highlighted the difficulty of goal attainment due to required behaviour changes. **Secondly**, Nowack's (2017) article on facilitating **behaviour change** to achieve goals, further underlined this difficulty.

In critically reflecting on my practice, I found that very few coachees entered the coaching relationship with a full understanding of the difficulty in achieving a goal. I concluded that despite the challenges of goal attainment, my coaching approach aligned with Kotler's (2021, p. 13) assertion that "we are all capable of so much more than we know", thereby reinforcing the rationale behind my inclination toward performance coaching.

NUMBER OF DAYS FOR BEHAVIOUR CHANGE

In critically reflecting on the association between achieving a goal and the necessity for behaviour change, I determined that it was crucial to research and assess the duration required for the establishment of a sustained behaviour change, commonly referred to as a habit. Researching and evaluating the literature, Lally, van Jaarsveld, Potts and Wardle (2010) revealed that the duration for a new behaviour to become ingrained, ranged from 18 to 254 days, depending upon its complexity with an average of 66 days for a behaviour to form.

In critically reflecting and evaluating **my practice** alongside this learning, I drew two conclusions. **Firstly**, like the general public, it was likely that my coachees believed in the misconception that it took 21 days for a new habit to form. **Secondly**, given that most of my coaching practice involved working with coachees for only two sessions, which is on the shorter end of the 18-to-254-day span, I questioned the effectiveness of my coaching in fostering sustainable behaviour change among these coachees (Evidence - LA2LO1.5 Most Coaching Limited to Two Sessions).

CHANGE MODELS

In critically researching and evaluating methodologies and academic literature pertaining to the factors that enable or hinder the achievement of a desired goal or performance objective in preparing for, during and moving through the “messy middle” (Brown, 2015, p. 26-28), **change models and readiness for change** emerged as critical elements, based on the established connection between goal attainment and behaviour change, identified above.

In critically considering and evaluating my academic underpinning across **my three levels of coach training programs** in pursuit of my RCC™, CBC™ and CMBC™ designations from the WABC, I found that “change” was one of the rare topics consistently integrated into the learning outcomes across all three programs. I was first introduced to the concept of change as an important aspect of coaching in 2016, during my first coach training program in pursuit of my RCC™ designation (refer to Learning Area 1, Learning Outcome 4 for details). Change methodologies and models were introduced over two of the 16 sessions. It was during the second session on November 22, 2016, that I learned about two change models corresponding to the two types of change. The **first** was the **transitions model**, used when change was forced upon a coachee and the second was the **intentional change** model, used when the coachee desired change (Evidence - LA2LO1.6 RCC Transitions Model and Intentional Change). In critically reflecting on this learning outcome and analyzing my knowledge of change models and theories, I discovered that these two **models were** what I later learned to be the **Transition Model** (Bridges, 1986) and Boyatzis’ **Intentional Change Theory** (Boyatzis, 2006, p. 608) in 2020, during my CBC™ coach training program.

In critically reflecting on this learning outcome, which was to critically research and evaluate various established methodologies and academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28) of performance, I focused on applying the **Intentional Change Theory** (Boyatzis, 2006, p. 608) within my coaching practice, as it was relevant to the participants in my study who desired change. Boyatzis’ theory consists of five elements:

1. Ideal self
2. Real self
3. Learning agenda
4. Experimentation and practice
5. Supporting and trusting relationships

In critically reflecting and analyzing the application of this change theory within my coaching practice, as referenced in my reflective assignment on July 1, 2020, for my CBC™ program (Evidence - LA2LO1.7 CBC Use of Intentional Change Theory 2020 - p. 3), I concluded that I employed the model at the outset of my coaching practice with new coachees for three specific reasons. **Firstly**, it facilitated the development of a clear vision of the coachee’s intended future state, aiding in finding clarity and alignment of the coachee’s end state. **Secondly**, since it emphasized the desired future, it caused the coaching discussion to focus on the positives and possibilities, which I found to be uplifting and hopeful for the coachee. **Thirdly**, it allowed for a deeper exploration of the motives behind the coachee’s desired future state, which I will analyze in more detail later in the learning outcome.

As an example, during my CBC™ program of study, I applied Boyatzis’ theory to my practice when my coachee (UM) was navigating a career transition, as the model helped to clarify both their desired future state and their current real state (Evidence - LA2LO1.8 Example of Intended Change Theory Use 2020 - p. 2). In reflecting on the coaching sessions with my coachee (UM), I found that establishing that clear vision enabled me to reference their desired future state throughout our coaching sessions when they were contemplating certain career choices.

In reflecting and evaluating the positives of how I utilized the Intentional Change Theory (Boyatzis, 2006, p. 608), I discovered that its structured nature aligned with my preference and coaching style. It allowed me to openly utilize the model as a tool and roadmap for discussion with the coachee, which was always well-received.

However, in critically reflecting and assessing my utilization of this particular change theory, I discovered a **significant limitation**. Employing this methodology as my primary change model failed to account for the coachee's readiness and preparation for change. In critically reflecting on my study entitled "What Derails Performance in the "Messy Middle"?" (Brown, 2015, p. 26-28) and the associated learning area, which was to "research, analyze and assess coaching effectiveness at navigating the complexities of the phase that is known as the "messy middle" in relation to performance", I discovered a **gap in my knowledge** and a **deficiency in my practice** pertaining to planning or preparation for change, which will be analyzed subsequently (refer to Learning Area 2, Learning Outcome 3 for details).

READINESS FOR CHANGE

I will delve deeper into researching and evaluating established methodologies and academic literature concerning change for two principal reasons. **Firstly**, given the pivotal role of behaviour change in goal attainment, change stands as a critical factor. **Secondly**, recognizing the significance of readiness for change underscores its importance within the change process.

I acquired knowledge of **three models** where preparation or readiness for change was incorporated into the model. The **first** model that integrated the **preparation facet of change** was the **Changeology Model** (Norcross *et al.*, 2012, p. 53-202), with its initial two stages emphasizing readiness for change. I first learned about this change model on February 10, 2020, in Module Two, entitled "Change Theories" of 16, during the virtual class session within my **CBC™** coach training program, previously outlined, where we examined various change theories (Evidence - LA2LO1.9 CBC Changeology - 2020). Later in the learning outcome, I will reflect on the utilization of this change model within my coaching practice. The five stages of the Norcross *et al.* model are as follows:

1. Being psyched (getting psyched)
2. Prepare (getting prepared)
3. Perspire (take action)
4. Persevere (manage slips)
5. Persist (maintain change)

The **second** model that integrated the **preparation** aspect of change was the **Transtheoretical Model (TTM)** (Prochaska and Prochaska, 1999, p.88-94), with its three stages focusing on readiness for change:

1. Precontemplation
2. Contemplation
3. Preparation
4. Action
5. Maintenance

Unlike the Changeology Model (Norcross *et al.*, 2012, p. 53-202) my knowledge of TTM (Prochaska and Prochaska, 1999, p.88-94) resulted solely from desk-based research for my study of the “messy middle” (Brown, 2015, p. 26-28) of performance in late 2022. During this research, I also learned about the **third** change model incorporating the preparation aspect. This additional knowledge stemmed from Lewin (1947), who identified readiness for change as the initial stage in a successful behaviour change process. These stages were:

1. Unfreezing the present
2. Moving to the new
3. Freezing on the new

Through critical reflection and assessment of the latter two coaching models, it became evident that I had **not applied** these frameworks in my practice. This realization spurred me to consider the potential impact on my practice had I acquired additional knowledge. **I will** analyze the impact to my coaching practice subsequently (refer to Learning Area 2, Learning Outcome 3 for details).

MOTIVATION

In critically researching and evaluating methodologies and academic literature pertaining to the factors that enabled or hindered the achievement of a desired goal or performance objective in preparing for, during and moving through the messy middle, **motivation and commitment to a goal surfaced as** crucial components.

I **first acquired knowledge** pertaining to motivation in preparation for and during the ensuing discussion on April 20, 2020, in Module 11 entitled “Closing the knowing-doing gap” of my CBC™ coach training program, where I learned to discern between “skill” and “will” coaching challenges (Evidence - LA2LO1.10 CBC Motivation - 2020). As a result of the desk-based research for my study on the “messy middle” (Brown, 2015, p. 26-28), I expanded my knowledge of a coachee’s “will” or motivation by delving into Berkman’s article on the neuroscience of goals and behaviour change (2018, p. 36) where he identified the importance of not only having the motivation, which he called the “**will**” but also the skills, capabilities and knowledge required to achieve a goal, which he called the “**way**”.

As stated above, in critically reflecting on the application of the Intentional Change Theory (Boyatzis, 2006, p. 608) within my coaching practice, I recognized the significance of introducing this model early in my **coaching sessions** with new coachees as a means of gaining insight into their motivation. Through further critical consideration and analysis of the importance of understanding a coachee’s motivation, I learned that I had wanted to gauge the strength of their motivation to achieve an outcome, knowing the challenging yet essential nature of behaviour change in the pursuit of a performance outcome. I acquired insights into the role of motivation in driving behaviour change and goal pursuit by reading Berkman’s article, where he defined motivation as, “the strength of the desire to attain a particular outcome, irrespective of how pleasant or unpleasant the experience of actually attaining it is” (2018, p. 36).

Through critical introspection and evaluation of the impact of my knowledge of motivation on my coaching practice, I examined what I found to be the most challenging aspect of my coaching practice with a former coachee (AT), as referenced above. This self-reflection led me to discover that I preferred working with coachees regardless of their proficiency levels as long as they were motivated to change, even if they did not attain their desired outcomes.

In critically considering and analyzing my discovery, I concluded that I had a bias toward working with intrinsically motivated coachees. My knowledge of **intrinsic and extrinsic motivation** originated during Module Eight entitled “Advanced Championing” in my CBC™ coach training program on March 23, 2020, where Berkman defined motivation as “the strength of the desire to attain a particular outcome, irrespective of how pleasant or

unpleasant the experience of actually attaining it is” (2018, p.36). During the desk-based research for my study, I furthered my understanding of the academic underpinning of **intrinsic motivation**, learning that Harlow (1958), a professor of psychology who conducted experiments with monkeys to study primate behaviour, discovered that the task itself was enough of a reward to exhibit a behaviour, and called this phenomenon, intrinsic motivation.

Reflecting on a coaching example where intrinsic motivation, goals and behaviour change intersected, I recall coaching two employees from the Canadian Professional Sales Association (CPSA) who faced challenges with their manager about their sales targets (Evidence - LA2LO1.11 Example of Goal Use 2021). Due to their disbelief in the achievability of their goals set by their manager, they were not committed to achieving their goals. In critically reflecting on my coaching approach with those two coachees, I assessed that while I recognized their lack of commitment to the sales target as indicative of a lack of intrinsic motivation, I did not tailor my coaching to address their motivation, thereby highlighting a **gap in my knowledge** regarding how to effectively coach individuals who lacked internal motivation. In considering and assessing what **I did well** with those two coachees, I concluded that I quickly identified the underlying relationship issue with their manager after just one coaching session, which appeared to have alleviated their concerns as they felt heard, understood and equipped with tools to enhance the relationship with their manager.

In critically reflecting on my experiential learning derived from this example and its impact on my coaching practice with future clients, I concluded that given the common occurrence of employer-mandated goals in corporate settings without employee input or buy-in, I would need to guide **future clients** who aim to establish and achieve goals by highly recommending that they **first** establish goals in collaboration with employees and **second**, uncover the intrinsic motivation of employees to optimize goal attainment.

NEUROSCIENCE

In critically researching and evaluating various established methodologies and academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28), neuroscience and its influence on performance emerged as a fundamental component.

I previously mentioned that neuroscience was one of my primary interests while pursuing my CMBC™ designation from the WABC. Upon critical reflection, I identified two main reasons for this interest. **Firstly**, my Bachelor of Science education instilled in me a belief in the value of science, motivating me to pursue coach training programs and integrate academic principles into my practice. **Secondly**, I perceived coaching as a fusion of art and science. (Evidence - LA2LO1.12 CMBC Art and Science - 2021 - p. 2).

As previously established, given the necessity and challenges of achieving sustained behavior change in goal attainment, I discovered how neuroscience could serve as the most effective tool for facilitating such change. This insight stemmed from the desk-based research I conducted for my study during Fall 2022, where I learned from authors and researchers such as Dr David Rock, who coined the term “neuroleadership” (NeuroLeadership Institute, no date), and highlighted the benefits that certain chemicals in our brain, like dopamine and oxytocin, had on our behaviour.

I deepened my knowledge of how to use the power of our brain in my coaching practice after reading *Before Happiness* (Achor, 2013, p. 100), where he explained that our brain makes a judgement about the feasibility of achieving a goal right at the outset of a goal pursuit journey. I learned from this book that our brain functions as a goal-oriented machine and about the benefits that a positive mindset had on the likelihood to achieve a goal.

In critically reflecting and assessing how I integrated neuroscience into my role as facilitator and coach with Learn², I determined that I did so by integrating it into our leadership development programs, where I discussed how the amygdala and emotional triggers influenced our interactions and dynamics with people around us (Evidence - LA2LO1.13 Neuroscience in Leadership Development Content).

In considering how to enhance the integration of neuroscience into my role as facilitator and coach, I concluded that I needed to improve my ability to articulate how neuroscience influences leaders' mindset and behaviour. For instance, a coachee (Fred D) commented after completing the professional foundations program (refer to Learning Area1, Introduction for details) that they felt as though they had undergone therapy after having completed two coaching sessions. In critically considering and assessing my mindset at the time, I concluded that while I acknowledged the connection between the brain and leadership, I needed to improve my ability to articulate not just the influence that the brain had on behaviour change

and leadership but also how leveraging neuroscience could profoundly enhance goal achievement.

In critically reflecting on how to optimize **neuroscience** as a tool in my coaching practice to aid coachees in achieving their goals or behaviour change, I discovered the significance of breaking down goals into manageable steps.

MINI-GOALS

In critically researching and evaluating various established methodologies and academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28), a fundamental component that surfaced was the impact of breaking down goals on the brain.

Prior to conducting desk-based research for my CMBC™ designation, as previously mentioned, I had not realized the advantages of breaking down goals until Achor highlighted the importance and advised breaking down goals until there was at least a “70 percent likelihood of achievement” (2013, p. 119).

I will critically reflect and analyze the impact that breaking down tasks and goals had on my coaching practice subsequently (refer to Learning Area 2, Learning Outcome 3 for details).

COMPETING COMMITMENTS

In critically researching and evaluating academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28) and in discussions with Dr Marshall, I identified competing priorities, also referred to as competing commitments, as a factor that could enable or hinder the achievement of a goal.

I first acquired knowledge of competing priorities while pursuing my CBC™ designation, specifically in Module Nine, “Overcoming Resistance,” (Marshall, 2020, p. 111) on March 30, 2020. During this module, I was introduced to Kegan and Lehay’s concept of the immunity to change worksheet (2009, p. 58) which comprised the following four pillars (Evidence - LA2LO1.14 CBC Immunity to Change - 2020):

1. The commitment
2. What was being done or not done to support the commitment
3. The competing commitments
4. What was/were the big assumptions pertaining to the competing commitment

FINAL THOUGHT

As previously mentioned, while this learning outcome focused on a subset of the 19 factors linked to the “messy middle” (Brown, 2015, p. 26-28), subsequent learning outcomes will critically examine and evaluate the established methodologies and academic literature concerning other factors of this challenging phase of performance, based on their relevance.

After a critical analysis of my coaching practice and the knowledge gleaned from desk-based research within this learning outcome, I believe that my efforts in researching and evaluating established methodologies and academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28), should provide a solid foundation to support my claim for credit.

Learning Area 2: Research, analyze and assess coaching effectiveness at navigating the complexities of the phase that is known as the "messy middle" in relation to performance.

Learning Outcome 2:

Critically analyze and assess the applicability of methodologies and academic literature concerning the "messy middle" of performance in practical contexts through an inquiry with a range of individuals.

INTRODUCTION

To highlight the extent of my **experiential learning** garnered from analyzing and assessing the applicability of various methodologies and academic literature related to navigating the complexities and challenges of the "messy middle" (Brown, 2015, p. 26-28) of performance, I intend to critically analyze my experiences to substantiate my claim for credit.

This learning outcome represents an **extension of the previous one**, in that while the prior outcome centered on demonstrating my knowledge and experience with methodologies and desk-based literature of factors impacting performance in preparing for, during and moving through the "messy middle" (Brown, 2015, p. 26-28), this outcome centers on my learning from having critically examined and evaluated the relevance of the desk-based research in relation to practical and lived experience by volunteers in my study.

For context purposes, as referenced in the previous learning outcome, as a requirement for completion of my **20-week program** of study for my CMBC™ designation, I undertook a coaching-related study entitled "What Derails Performance in the "Messy Middle"?" (Brown, 2015, p. 26-28) (Evidence - LA2LO2.1 CMBC Coaching Training Program 2021 - Overview - Project Requirement). The study was a combination of multiple methods, including surveys, self-reflection and interviews. I based the length of the study primarily on the literature concerning habit development, where Nowack (2017) found that, on average, it took 66 days for a new habit to form in pursuit of a goal (refer to Learning Area 2, Learning Outcome 1 for details).

Despite the optimal study duration perhaps being 66 days, I shortened the timeframe to 60 days for two reasons. **Firstly**, I concluded that a six-day adjustment seemed unlikely to significantly impact the findings of the study. **Secondly**, upon examination, I deemed it

potentially risky to request participants' commitment beyond 60 days, as it might have resulted in diminished engagement by participants in the study.

QUANTITATIVE DATA

On Day 1, Day 30 and Day 60 of their 60-day goal pursuit journey, participants received virtually identical **surveys**, comprising 27 core questions that delved into the **19 factors** associated with the “messy middle” (Brown, 2015, p. 26-28) (refer to Learning Area 2, Introduction for details). The survey underwent triangulation with Dr. Peggy Marshall, who scrutinized it for accuracy, validity and its potential to produce pertinent findings. A five-point Likert scale was employed to gauge the degree of agreement with each question, presented in a statement format. The greater the participant agreed with the survey question, the more their behaviour was aligned with what the theory indicated as behaviour important to achieving a goal. The reverse was also true (Evidence - LA2LO2.2 Practical Study on Messy Middle - 2023 - Annex A - p. 46-50).

QUALITATIVE DATA

The qualitative data in the study emanated from two sources. **Firstly**, participants recorded their **reflections** using a five-question template once between Day 1 to Day 30 and again between Day 31 to Day 60. **Secondly**, at the conclusion of the 60-day period, participants were invited to share their insights and lived experiences through a **final debrief interview** comprised of 11 questions, which they could respond to in written format or through a telephone or virtual meeting (Evidence – LA2LO2.3 Final Debrief Interview Option).

To provide clarity, the survey responses, reflections and final debrief interview answers were crucial as they constituted the **foundation of the data** used to analyze and assess the applicability of methodologies and academic literature concerning the “messy middle” (Brown, 2015, p. 26-28) of performance in real-world scenarios with a range of individuals.

VOLUNTEER PARTICIPANTS

To ensure a diverse pool of individuals for benchmark methodologies and literature against the practicality of their lived experience, participants were recruited through an open call for volunteers. Written confirmation was required after informing them of the study's expectations. The voluntary nature of their involvement was important, therefore participants could withdraw at any time and able to identify their own goal and starting date,

set for August 2022 (Evidence – LA2LO2.4 Call for Volunteers). The volunteer aspect of participation underscored the intrinsic motivation of participants, thereby affirming that the findings were reflective of lived experiences and the practical applicability of the desk-based research into the methodologies and academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28).

For reference, the subsequent learning outcome will critically analyze the impact and applicability of the theoretical and practical learning pertaining to this challenging phase of performance on my coaching practice. To lay the groundwork for my critical analysis and assessment of the applicability of the methodologies and academic literature concerning the “messy middle” (Brown, 2015, p. 26-28) of performance in practical contexts, I will first briefly provide **two general discoveries** from the study as a backdrop. Then, I will categorize participants’ experiences navigating this phase using **three distinct lenses** to substantiate my claim for credit:

- How are people prepared going into this phase?
- What do people do once in this phase?
- How do people move through this phase?

GENERAL DISCOVERIES

The **first general discovery** from the study was that, out of the 26 participants who began the study, with 21 reporting an outcome and 20 engaging in the final debrief interview, **none achieved** their goal (Evidence – LA2LO2.5 Excerpt from Study - None achieved Goal - p. 26). In critically reflecting on and examining my thoughts and feelings about the result, I was extremely **surprised** for two reasons. **Firstly**, some of the participants were themselves coaches. **Secondly**, some participants shared that they had previously successfully achieved a goal. Analyzing the cause of my feelings, I concluded that, in both cases, I expected those participants to know what to do to achieve their goal.

In critically reflecting and evaluating the **positive aspects** of the outcome, I concluded that a completion rate of 77% (20 out of 26 participants) for the final debrief interview was significant, as it enabled me to gather lived experiences that served as a solid foundation for this learning outcome. In considering and examining what I perceived to be a high

completion rate, I determined that it primarily stemmed from individuals' considerable **interest** in achieving a goal.

In critically reflecting on **what I learned** from the outcome where none of the participants achieved their goal, and in analyzing and assessing the academic literature concerning performance, I concluded that, although Berkman (2018) and Nowack (2017) indicated the difficulty of goal attainment in the previous learning outcome, the practical research eliminated any ambiguity regarding the difficulty by clearly demonstrating and making tangible the extent of that difficulty.

The **second general discovery** from the study, which intended to uncover “What derails performance in the “messy middle”?” (Brown, 2015, p. 26-28), was that none of the participants sought an explanation for this phase of performance throughout the study. Below, I will critically reflect on my knowledge about this phase.

HOW ARE PEOPLE PREPARED GOING INTO THE “MESSY MIDDLE”?

In critically analyzing and evaluating the relevance of methodologies and academic literature concerning the preparation individuals undergo as they enter the “messy middle” (Brown, 2015, p. 26-28), I first focused on the phase extending from participants' consent to participate in the study until they reached the challenging phase of performance. Based on the responses from the final debrief interview with 20 participants, I learned that the most significant factor **aiding** in preparation was **planning**. Additionally, planning was also the identified as the factor they felt could have been **done differently** to be more prepared for this phase of their goal pursuit journey. In both instances, an equal number of participants, 12 out of 20 (60%), identified planning as the **predominant factor** that both assisted them and could have been approached differently (Evidence – LA2LO2.6 Excerpt from Study - Planning - p. 27-28).

In critically considering my reaction to this revelation, I was **struck** by the dual nature of planning, which both facilitated and hindered preparation for the “messy middle” (Brown, 2015, p. 26-28). I did not expect that individuals who regarded planning as the most pivotal factor in their preparation would also perceive it as the aspect they could have approached differently. I concluded that despite individuals engaging in a certain degree of planning,

there remained a discernible gap in their readiness for change, rendering them ill-equipped to navigate the complexities and challenges of pursuing a goal.

In critically reflecting on what I **learned** about the importance of planning from the experience of the individuals in the study, **compared to the** literature and desk-based research, I concluded that certain change models, such as Boyatzis' Intentional Change Theory (Boyatzis, 2006, p. 608), do not address the planning required before one is ready to change (refer to Learning Area 2, Learning Outcome 1 for details). Conversely, in analyzing and evaluating change models such as the **Changeology Model** (Norcross *et al.*, 2012, p. 53-202) and the **Transtheoretical Model (TTM)** (Prochaska and Prochaska, 1999) (refer to Learning Area 1, Learning Outcome 1 for details), which do incorporate preparation into their methodology, I concluded that they do not emphasize the importance of preparation for change to the extent where it is **considered a prerequisite** for change. In further examining both these change models, it became apparent that they do not specifically identify planning in their methodology, prompting me to question the terminologies chosen for the methodologies and the disparities between planning and preparation.

Based on the responses from the final debrief interview with 20 participants, I learned that the **second most significant** factor **aiding** in preparation for the “messy middle” (Brown, 2015, p. 26-28) was **breaking down goals or tasks**. Similar to planning, I was surprised to learn that **breaking down goals or tasks** was also identified as the second most crucial factor that participants believed they could have **done differently** to prepare for their goal pursuit journey. Eight out of 20 participants (40%) noted its benefit, while nine out of 20 (45%) identified how it would have served them had they done so (Evidence – See previous LA2LO2.6). In critically reflecting on the source of my reaction to discovering that **breaking down goals or tasks** emerged as the second most crucial factor, I realized that my surprise stemmed from not expecting participants in the study to be familiar with this strategy. Upon assessing what I could have **done differently**, I recognized the importance of cross-referencing the eight and nine individuals who mentioned **breaking down goals or tasks** to determine if they were, in fact, the coaches who had implemented this strategy.

In critically analyzing and assessing the applicability of methodologies and academic literature concerning the “messy middle” (Brown, 2015, p. 26-28) of performance in practical

contexts through an inquire with a range of individuals, I concluded that my study **corroborated the findings of my desk-based research**, which emphasized the significance of mini-goals and the benefits of breaking down goals (refer to Learning Area 2, Learning Outcome 1 for details).

In critically appraising the other factors identified by participants that either assisted them or could have been approached differently, I concluded that **no other factor emerged from the study as being significant** (i.e. exceeding 25%) (Evidence – See previous LA2LO2.6). Nevertheless, there were no surprises in that those factors mentioned, such as changing habits, reflecting, having a clear vision and the importance of the goal, all aligned with the findings of my desk-based research.

WHAT DO PEOPLE DO ONCE IN THE “MESSY MIDDLE”?

Having critically analyzed and evaluated the significance of methodologies and academic literature regarding the preparation individuals undergo as they enter the “messy middle” (Brown, 2015, p. 26-28) of performance, I will now pivot to examine the **challenges encountered during** this phase within practical contexts, drawing insights from inquiries with a range of individuals, to support my claim for credit.

Based on responses from the final debrief interview with 20 participants, **eight factors** were identified by more than one participant as their most challenging obstacle in the “messy middle” (Brown, 2015, p. 26-28). **Competing priorities**, also referred to as competing commitments, received the highest number of mentions, noted by eight out of 20 participants (40%), as detailed below (Evidence – LA2LO2.7 Factors in the Messy Middle - p. 28).

- | | |
|------------------------------------|------------|
| • Competing priorities | 8 mentions |
| • Health (physical/mental) issues | 4 mentions |
| • Lack of planning | 3 mentions |
| • Lack of positive thinking | 3 mentions |
| • Importance of goal | 3 mentions |
| • Stuck in hold habits | 3 mentions |
| • Lack of energy | 2 mentions |
| • External factors outside control | 2 mentions |

In critically reflecting on the identification of competing priorities as the primary challenge experienced in the “messy middle” (Brown, 2015, p. 26-28), I was **not surprised** as it aligned with the desk-based research on goal achievement (refer to Learning Area 2, Learning Outcome 1 for details). In critically considering and evaluating the implications of this finding, I **concluded that, in addition to being the primary challenge**, the fact that **twice as many participants** identified competing priorities as their single most important obstacle as any other factor, underscores its **significance**. While this finding validated the academic literature, I was uncertain if it had been accorded appropriate importance in coaching methodologies. Nonetheless, the clear identification of this significant factor will have a profound **impact on my coaching practice**, which will be further detailed in the subsequent learning outcome.

In critically appraising the remaining seven factors identified by more than one participant as **challenges encountered during** the “messy middle” (Brown, 2015, p. 26-28), two insights were particular **surprising**. **Firstly, health issues** emerged as the second most influential challenge encountered by participants, a phenomenon unaddressed in academic literature or coaching methodology. Due to the unexpected influence on factors impacting the “messy middle”, health issues were not accounted for in the practical research. **Secondly, a lack of planning** was ranked as one of the third most critical challenges experienced, persistently hindering progress toward goal attainment.

In critically reflecting on and determining what **went well** in clarifying the challenges individuals encountered, not only did a clear focal point for my practice emerge, but the findings reinforced my earlier assertion that comprehensive planning should precede any meaningful attempt at change.

In considering **my feelings** regarding the practical research pertaining to the challenges of the “messy middle” (Brown, 2015, p. 26-28), I experienced a sense of **pride** in the work accomplished, as it produced a more definitive list of factors that would influence my coaching practice. In further introspection, upon confirming this through a practical study involving a range of individuals, I experienced disappointment and perplexity at the absence of knowledge of this phase in both my coaching training programs and the corresponding academic literature. If not for the requirement for my CMBC™ designation, I might have

remained unaware of this phenomenon. This realization shook my confidence, leading me to question and ultimately recognize the depth of knowledge yet to be acquired.

WHEN WAS THE “MESSY MIDDLE” AND HOW LONG DID IT LAST?

In critically reflecting on my findings, participants did not require an explanation of the “messy middle” (Brown, 2015, p. 26-28). Three key learnings surfaced after analyzing and assessing these findings. **Firstly**, all 20 participants involved in the final debrief interview confirmed **experiencing** this phase. **Secondly**, it became apparent that this phase did not uniformly occur in the **middle** of performance. **Thirdly**, the **duration** of the “messy middle” (Brown, 2015, p. 26-28) varied among participants.

In critically examining the occurrence and duration of the “messy middle” (Brown, 2015, p. 26-28), I drew two **conclusions** based on the practical context of the study with a range of individuals. **Firstly**, if this phase had commenced in the middle of the 60-day goal pursuit journey for participants, it would have occurred in week four. However, despite the highest number of participants, six out of 20 (30%), encountering this phase in week four, a significant number, 12 out of 20 participants (60%), experienced it within the first three weeks, thus preceding the middle (Evidence – LA2LO2.8 Duration of Messy Middle - p. 29). My **second conclusion** was that for nine out of 20 participants (45%), the “messy middle” (Brown, 2015, p. 26-28) persisted for four weeks or more within an eight-week period. Additionally, two groups, each consisting of four out of 20 participants (20%), experienced this phase for two weeks and one week, respectively.

Upon critically examining of **my feelings regarding these findings**, I found myself amazed. Despite my acquired knowledge of the challenges inherent in goal attainment, performance enhancement or any transformative endeavor, the rapidity and enduring nature with which the “messy middle” (Brown, 2015, p. 26-28) manifested itself still caught me off guard. The influence of this realization on my coaching practice will be explored in the subsequent learning outcome.

In conducting a critical analysis of methodologies and academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28), as mentioned earlier, I was not only surprised by the lack of knowledge about this phase but I also found the notable **absence of discussion** regarding the timing and duration of its occurrence within those few references perplexing.

HOW DO PEOPLE MOVE THROUGH THE “MESSY MIDDLE”?

After critically analyzing and evaluating the significance of methodologies and academic literature regarding the preparation individuals undergo as they enter the “messy middle” (Brown, 2015, p. 26-28) of performance, I will now pivot to examine how to **move through the challenges encountered during** this phase, drawing insights from inquiries with a range of individuals, to support my claim for credit.

In reflecting on how individuals moved through the “messy middle” (Brown, 2015, p. 26-28), as detailed in the final debrief interview, I was pleasantly surprised to learn that 18 out of 20 participants (90%) **successfully navigated** this phase, especially noteworthy given that none had achieved their goal. These two outcomes initially seemed contradictory to me. In further reflecting and debating the **potential cause** for what I believed was a significant success rate, I hypothesized that it might be attributed to the importance of individuals’ goals and their motivation for achieving them, which will be further explored below.

In critically examining and evaluating the factors identified by study participants as aiding their progression through the “messy middle” (Brown, 2015, p. 26-28), I discovered that six factors were identified by three or more participants (Evidence – LA2LO2.9 Factors Getting Through Messy Middle – p. 30):

- | | |
|--|------------|
| • Positive thinking/looking at the successes of their journey | 5 mentions |
| • Focusing on the importance of their goal | 4 mentions |
| • Successfully changing old habits | 4 mentions |
| • Breaking down tasks/goals | 3 mentions |
| • Having a plan | 3 mentions |
| • Reflecting /journaling | 3 mentions |

In thoroughly analyzing and assessing the aforementioned factors, I derived **three insights**. **Firstly**, unlike in previous stages of the “messy middle” (Brown, 2015, p. 26-28) of performance, where dominant factors had been identified, **no singularly prominent factor** emerged as having facilitated participants’ passage through this phase. In critically reflecting on my approach during the final debrief interview, where these responses were gathered, I recognized a potentially more effective strategy that could have been employed with individuals as an alternative. I could have had participants rank a predetermined set of

factors that aided their navigation through their challenges, which may have altered the outcome of the study. In reflecting on my choice not to employ this method, I deliberately refrained from doing so to prioritize the integrity of participants' responses and to minimize potential influence.

The **second insight** pertained to how **positive** thinking and looking at their successes during their 60-day journey was identified by five out of 20 participants (25%) as the most significant factor guiding individuals through the "messy middle" (Brown, 2015, p. 26-28). This discovery aligned with the academic literature in the previous learning outcome, particularly regarding the influence of certain brain chemicals on behaviour and the benefits of a positive mindset, as described by Achor (2013, p. 100). While the numerical representation of five out of 20 participants (25%) may not appear significant, the fact that positive thinking ranked as the top factor was significant to my coaching practice. Furthermore, the consistency between participants' experiences and academic literature underscores the importance of positivity and the brain function.

The **third** insight derived from my critical examination and evaluation of the factors highlighted by study participants as facilitating their progression through their challenges involved **two factors from preceding stages**. The benefits of planning identified both in the preparation phase and during the "messy middle" (Brown, 2015, p. 26-28) were again found to be instrumental in navigating this phase by three out of 20 participants (15%). Likewise, an equivalent number of participants emphasized the importance of **breaking down tasks/goals** in preparation for the "messy middle" (Brown, 2015, p. 26-28). In critically examining my **feelings** regarding these two recurrent factors, I found satisfaction in their ability to shed light on a potential hierarchy of factors, to be elaborated upon below.

In critically appraising other factors identified by study participants as aiding their progression through their challenges, beyond those listed above, two out of 20 participants (10%) highlighted two unexpected factors that had not **been noted in the academic literature** on goal attainment. These factors included **feeling personally accountable** and **seeking out information**. In analyzing these two unexpected factors, I identified the presence of the Hawthorne effect. Sedgwick and Greenwood (2015, p. 1) describe this effect as "a change in behaviour as a motivational response to the interest, care, or attention received through observation and assessment". Upon further examining this effect

on study participants and its potential influence on their journey towards goal attainment, I observed that, despite being offered the choice to engage in the study individually or with a partner, all participants opted to proceed alone. This decision led me to question whether their goal pursuit outcomes might have differed had they chosen to undertake the study with a partner.

In critically reflecting on my **feelings** concerning how seeking out information helped facilitate the “messy middle” (Brown, 2015, p. 26-28), I was surprised that it was considered a factor. Upon attempting to discern the **reason** for my surprise, the only conclusion I could draw was that I might have assumed that I would have acquired important knowledge through my coach training programs.

MOTIVATION

In critically analyzing and assessing the applicability of methodologies and academic literature concerning the “messy middle” (Brown, 2015, p. 26-28) of performance in practical contexts through an inquiry with a range of individuals, the underlying **motivation** behind the goal was recognized in the desk-based research as a fundamental factor in behavioural change (refer to Learning Area 2, Learning Outcome 1 for details). Given that participants **volunteered** for the study, it was inferred that they were motivated to achieve their goal.

The literature further highlighted that behaviour change crucial for goal attainment would ensue when individuals possessed both the “**will**” (motivation) and the “**way**” (skills, capabilities and knowledge). Upon critically reflecting on my comprehension of the “will” and the “way”, I recognized that I had predominantly regarded them as the most crucial and nearly sole requirements for accomplishing a goal which. After careful reflection this assumption was the cause of my genuine surprise and disappointment upon discovering that having both the “will” and the “way” was inadequate to attain one’s goal.

For instance, in critically considering and reflecting on the source of my surprise, I concluded that I had assumed, given that some participants in the study were coaches who presumably possessed both the “will” and the “way”, that these qualities would suffice in goal attainment. However, based on my evaluation of the findings, I learned that merely having both the “will” and the “way” was **not enough** to achieve one’s goal.

IRRELEVANT FACTORS

In critically analyzing and assessing the applicability of methodologies and academic literature concerning the factors impacting performance in preparing for, during and moving through the “messy middle” (Brown, 2015, p. 26-28) within practical contexts through an inquiry with a range of individuals, I discovered that four out of the 19 (21%) factors were not mentioned by participants during the final debrief interviews. These factors were:

- Pursuing the goal was **fun**
- Goal as part of **identity**
- Goal aligned to **work/life**
- Goal aligned to **passion/purpose**

In critically analyzing and evaluating what **I would do differently** if I were to conduct the study again, I would have been more explicit in seeking clarification from the participants regarding the factors that were insignificant in aiding or hindering navigation through their challenges. I was uncertain whether their omission was due to oversight or irrelevance.

WHEN AND HOW PARTICIPANTS KNEW IF THEY WERE (OR WERE NOT) GOING TO ACHIEVE THEIR GOAL?

Having critically analyzed and assessed the applicability of methodologies and academic literature concerning the factors impacting performance in preparing for, during and moving through the “messy middle” (Brown, 2015, p. 26-28) within practical contexts through an inquiry with a range of individuals, I will now critically analyze another aspect of the study, somewhat unrelated to this phase yet very significant to the achievement of a goal.

In critically reflecting on and analyzing the responses from the 20 participants in the final debrief interview regarding when and how they knew that they were or were not going to achieve their goal, it was found that among the 13 participants (65%) who partially achieved their goal at the end of the study, 12 of them (92%) attributed it to experiencing success or progress, feeling self-confident, having someone key believe in them or experiencing a physical reaction when their behaviour did not align with their goal.

In analyzing and evaluating these responses, I acquired additional knowledge of Bandura's **self-efficacy theory of motivation** (1997). Despite their apparent differences and seeming irrelevance, these responses essentially outlined the theory, which pertains to one's belief in their own skill, capabilities and knowledge to perform a specific task. While this theory was not specifically highlighted in the literature as a factor relating to the "messy middle" (Brown, 2015, p. 26-28), it proved to be a crucial element for success based on the practical contexts of performance.

FINAL THOUGHT

After critically analyzing and assessing the applicability of methodologies and academic literature pertaining to the "messy middle" (Brown, 2015, p. 26-28) of performance in practical contexts through an inquiry with a range of individuals, I learned from the lived experiences of study participants about the hierarchy and relevant importance of factors at each stage of performance. Additionally, while coaching methodologies and academic literature focused on what conditions were necessary for participants to achieve a goal, elevate performance or change behaviour, the practical research went beyond mere applicability to highlight factors that contributed to setbacks and performance derailers.

Given the critical examination of the knowledge and experiential learning delineated in this learning outcome, I believe that my efforts in analyzing and assessing the applicability of methodologies and academic literature pertaining to the "messy middle" (Brown, 2015, p. 26-28) of performance in practical contexts through an inquiry with a range of individuals, supports my claim for credit.

Learning Area 2: Research, analyze and assess coaching effectiveness at navigating the complexities of the phase that is known as the "messy middle" in relation to performance.

Learning Outcome 3:

Critically analyze and further develop my coaching practice by integrating critical insights from both the theoretical and practical learning of the "messy middle" of performance.

To underscore the depth of my **experiential learning** derived from researching and evaluating various methodologies and academic literature pertaining to navigating the complexities and challenges of the "messy middle" (Brown, 2015, p. 26-28) of performance, and from their applicability in a practical context through an inquiry with a range of individuals, I intend to critically analyze their impact on my coaching practice, with the objective of substantiating my claim for credit.

INTRODUCTION

In critically reflecting on my personal and professional experiences, I have always been intrigued by the pursuit of performance excellence, driven by a curiosity to decipher the determinants distinguishing individuals who realized their objectives or elevated their performance from those who did not. During Fall 2022, as a requirement of my CMBC™ designation, I undertook a study entitled "**What Derails Performance in the "Messy Middle"?**" (Brown, 2015, p. 26-28) (refer to Learning Area 1, Learning Outcome 1 for details).

In reflecting and examining the **source of my enthusiasm**, I felt privileged and excited that, as a coach, I was embarking on a practical inquiry that combined my **passion** for performance excellence with my **purpose** of supporting coachees in achieving their own performance excellence. I related to what Achor (2013, p. 114) referred to as "**meseach**" in *Before Happiness*, where he explained it as research undertaken based on the interest and reality of the researcher.

In critically considering the **intended impact** of my study, I aimed to research and evaluate **the factors causing the abandonment of a self-identified goal** in the "messy middle" (Brown, 2015, p. 26-28) to better equip coachees in achieving a goal, elevating

performance or succeeding in behavioural change. These terms will be used interchangeably throughout this learning outcome.

In reflecting on my **feelings after completing the study**, I determined that I had acquired significant knowledge and gained tremendous insights, which increased my confidence in my coaching skills and better prepared to help coachees identify strategies for preparing for, during and moving through the “messy middle” (Brown, 2015, p. 26-28). Below, I will critically reflect on these details.

An illustration of my enthusiasm for the topic, which I evaluated as an immediate positive, is evident from the outset of my study as I adopted the term “messy middle” (Brown, 2015, p. 26-28) when communicating my internal colleagues at Learn² (Evidence – LA2LO3.1 Use of Messy Middle).

IMPACT OF ACADEMIC LITERATURE/METHODOLOGIES AND PRACTICAL STUDY

After thoroughly analyzing my learnings from both the theoretical and practical inquiries with a range of individuals, I concluded that the academic literature comprehensively **identified** the critical factors necessary to successfully achieve a goal, elevate performance or change behaviour. What was less apparent, based on my knowledge, were the derailers to performance. While the desk-based literature and established methodologies provided a solid foundation of performance knowledge for my coaching practice, it was the **practical study** with a range of individuals that enabled me to **validate** the theoretical research, identify the **factors that derailed performance** in the “messy middle” (Brown, 2015, p. 26-28) and prioritize the most critical factors. This was crucial for my practice as it allowed me to focus my coaching on the most critical aspects identified through a practical context. Below, I will detail the specifics of how this realization impacted my coaching practice.

MOST CRITICAL FACTOR IN PREPARATION FOR “MESSY MIDDLE”: PLANNING

To validate my claim for credit, I will critically analyze my professional and personal experiences related to the single most critical factor **impacting the preparation phase for** the “messy middle” (Brown, 2015, p. 26-28) of performance. This analysis integrates insights from both theoretical and practical learning with the aim of further developing and enhancing my coaching practice.

In thoroughly analyzing and evaluating the various factors identified from the academic literature pertaining to the preparation phase and based on the practical research through the lived experiences of the individuals in my study, I discovered that the single most important factor influencing individuals' preparedness for challenges in pursuit of their goal was **effective planning** (refer to Learning Area 2, Learning Outcome 2 for details).

In critically reflecting on **my feelings** about this determination, I was surprised by the profound influence of planning on performance, both prior to and during the “messy middle” (Brown, 2015, p. 26-28). A notable example from the study involved a participant (AD), who typically engaged in meticulous planning but adopted a more spontaneous approach for this study. This change, as reported during the final debrief interview, backfired, resulting in multiple “messy middles” (Brown, 2015, p. 26-28) (Evidence - LA2LO3.2 Multiple Messy Middles (AD)).

Critically reflecting on the impact of finding that planning was the single most crucial aspect of preparation, I arrived at **two significant insights** regarding my coaching practice.

Firstly, I recognized that aside from my internal coachees employed by my contractor, Learn² from August 2019 to the present (refer to Curriculum Vitae for details), my coaching practice primarily involved coachees from the **leadership development programs** of the premiere client (refer to Learning Area 1, Introduction for details). This was significant because these coachees typically had access to only **two coaching sessions** with me. Consequently, the nature of my discussions with these coachees did not lend itself to planning for the “messy middle” (Brown, 2015, p. 26-28) as their focus was predominantly on moving through their immediate challenges, preventing me from exploring their level of planning and preparation.

Secondly, in reflecting on and critically appraising my practice, I recognized that I missed working with coachees in a context and partnership that extended beyond two coaching sessions. This longer-term engagement would enable me to, once again, work with coachees to effect change by cultivating a more profound and meaningful relationship, similar to what I had previously accomplished with former coachees (Evidence – LA2LO3.3 Coach Coachee Relationship (UM)). This realization prompted me to question my current practice and consider **the merits of shifting the focus of my clients** in the future.

PLANNING WITHIN CHANGE METHODOLOGIES

In further reflecting on the impact of my practical study, where planning was identified as the single most critical aspect for achieving a desired goal or performance objective in the preparation phase, I discovered **a gap in my knowledge** and deficiency in my practice, as briefly mentioned earlier in this learning area (refer to Learning Area 2, Learning Outcome 1 for details).

In examining the gap in my knowledge, I concluded that **I lacked the awareness to analyze and identify the precise stage of readiness for change** that coachees were in, based on the **Transtheoretical Model (TTM)** (Prochaska and Prochaska, 1999). The model delineates three states of readiness for change: precontemplation, contemplation and preparation (refer to Learning Area 2, Learning Outcome 1 for details).

This **knowledge gap** resulted in a shortcoming in my practice, as I lacked the skills to effectively coach at each stage of readiness to change. Critically considering the reason for this lack of knowledge and skill, I determined it was likely due to having acquired knowledge of the **TTM** (Prochaska and Prochaska, 1999) in 2023, which was later in my coach training and I learned about this model while completing my study. To put in perspective, I had been coaching for eight years using other change models that did not discern stages of preparation.

Reflecting on the change methodology I predominantly employed with my coachees, I determined that my preferred change model was the **Intentional Change Theory (ICT)** (Boyatzis, 2006, p. 608) (Evidence – LA2LO3.4 Use of ICT with Clients). However, insights from both the theoretical and practical learning of the “messy middle” (Brown, 2015, p. 26-28) of performance revealed that my reliance on this particular change theory failed to adequately account for and prioritize the planning and preparation phase of change.

Assessing my use of methodologies that include a readiness for change stage, I concluded that I had integrated one model, the **Changeology Model** (Norcross *et al.*, 2012, p. 53-202) into my practice. For example, when coaching two internal coachees from 2019 to April 2021 (CL) and from 2019 to January 2023 (AD), I employed this change model, utilizing the first two stages of change, psyched and prepared. In critically reflecting on and assessing

what I **did well** with these two coachees (CL/AD), who sought to change behaviour but found themselves stuck in the “messy middle” (Brown, 2015, p. 26-28) of performance, I concluded that I had effectively incorporated the **Changeology Model** (Norcross *et al.*, 2012, p. 53-202). This approach enabled me to quickly recognize that both coachees were stuck and had not yet progressed beyond the stages of readiness for change. However, in examining and assessing what I **did not do well**, I did not effectively coach them through those stages because I lacked the skills to guide them or determine if my efforts were working.

In evaluating the validity of my conclusion that I had not effectively coached these two internal coachees, I determined that I **lacked the knowledge to accurately ascertain** whether my assertion was accurate or if I perhaps had unrealistic expectations regarding the time it took for my coachees (CL/AD) to be ready to change.

Reflecting on this learning area and its impact on my practice, I recognized **two key insights**. **Firstly**, the importance of emphasizing to coachees the critical, albeit seemingly counterintuitive, value of refraining from taking immediate action. **Secondly**, I likely shared the same propensity or bias as my coachees for taking action prematurely, underestimating the time and effort required to achieve a state of readiness by adequately planning for the “messy middle” (Brown, 2015, p. 26-28).

Considering what I **needed to do differently** in my coaching practice, I determined that with future coachees, including those with only two coaching sessions, I could **test the strategy** of having them slow down and take the time to effectively plan and prepare for their journey by questioning, discussing and assessing their level of readiness to change. I also need to reinforce the concept and inevitability of the “messy middle” (Brown, 2015, p. 26-28) and inform coachees that the path to achieving a goal, elevating performance or changing behaviour begins with comprehensive planning and preparation.

Having assessed my professional and personal experiences related to planning for the “messy middle” (Brown, 2015, p. 26-28) of performance, I will now critically evaluate my experiences concerning **two key factors, competing priorities and lack of planning**, that hindered individuals’ progression through this phase, to further validate my claim for credit.

By critically analyzing and integrating insights from both the theoretical and practical learning of this phase, I aim to further develop and enhance my coaching practice.

COMPETING PRIORITIES

In critically researching and evaluating academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28) of performance, I identified **competing priorities** as one of 19 factors that could enable or hinder the achievement of a goal (refer to Learning Area 1, Learning Outcome 1 for details). Subsequently, in analyzing the responses from individuals who participated in the final debrief interview, I found that competing priorities were identified by the greatest number of participants, eight out of 20 participants (40%), as the **most challenging factor** hindering their progression in pursuit of their goals.

Evaluating the value and influence that competing commitments had on my coaching practice, I deemed it paramount to acquire additional knowledge about Kegan and Lehay’s immunity to change test (2009, p. 58) (refer to Learning Area 2, Learning Outcome 1 for details). I further explored the concept of immunity to change by listening to a podcast hosted by Brown featuring Lehay (Brown, 2022). This expanded my initial knowledge, acquired during my pursuit of the CBC™ designation, to include a fifth column concerning how to test the big assumption. Recognizing the importance of competing priorities as a limiting factor in achieving a goal, elevating performance or changing behaviour, I successfully persuaded the premiere client to integrate the comprehensive immunity to change test into the redesigned Foundations programs (refer to Learning Area 1, Introduction for details) (Evidence - LA2LO3.5 Immunity to Change in LD Content).

Considering the rationale for incorporating competing priorities into the leadership development program, I identified **two primary reasons**. **Firstly**, including that content in the curriculum provided participants with a tool to navigate competing priorities, facilitating discussions on this matter during our coaching sessions. **Secondly**, based on the study results, it was highly likely that participants in the program, who were also my coachees, would benefit from having a tool to work through competing priorities as they encountered the “messy middle” (Brown, 2015, p. 26-28) of their goal.

In further reflecting on and analyzing my practice, I concluded that relying on a single methodology within my toolkit was insufficient to support coachees in managing competing

priorities. Recognizing this limitation, I determined that I needed to **acquire additional knowledge** about diverse models to provide a more comprehensive and effective array of strategies for my coachees.

MISALIGNMENT OF BEHAVIOUR WITH 19 FACTORS

In scrutinizing the survey responses used to evaluate the applicability of methodologies and academic literature regarding the “messy middle” (Brown, 2015, p. 26-28) of performance, I was struck by the revelation that 15 out of 16 participants (94%) who completed all three surveys **disagreed** with, on average, 3.6 out of the 19 identified factors over their entire 60-day journey. This finding was crucial as it highlighted a significant misalignment between the **participants’ behaviours and the factors deemed essential for performance** according to the literature (Evidence – LA2LO3.6 Survey Results Summary). Reflecting on the connection between the participants’ behavioural misalignment and their ability to navigate the challenging phase of their performance, I concluded that their lack of success in achieving their goals was understandable. This perceived failure in achieving their goal could be attributed to an inability to align behaviour with the 19 factors essential for progressing through the “messy middle” (Brown, 2015, p. 26-28).

In reflecting on and examining my **feelings** about this finding, I was surprised by what I considered an unexpected result, particularly given that some of the study participants were themselves coaches. In further exploring the source of my feelings, I discovered that I mistakenly expected the coaches in the survey to have the awareness, acknowledge and ability to recognize and address their misalignment challenges.

Discovering that 15 out of 16 participants (94%), including some coaches, were unable to successfully change the behaviour necessary to navigate through the challenges of performance prompted me to critically reflect on my own practice and past experiences with coachees. This introspection extended to an internal coachee (AT) at Learn², who had previously posed challenges and evoked feelings of frustration in me, reinforcing my preference for working with clients who I perceived to be **motivated** (refer to Learning Area 2, Learning Outcome 1 for details).

Further reflecting on and **analyzing** my coaching practice, particularly in light of my perception of the link between a coachee's motivation and my coaching preference, as exemplified by my experiences with the internal coachee (AT), I uncovered **three** insights about my approach to coaching. **Firstly**, I **concluded** that I had **underestimated** the complexity of behavioural change and the profound impact of the “messy middle” (Brown, 2015, p. 26-28) on this process. This misjudgement likely caused me to mistakenly interpret and equate coachees' struggles with changing behaviour to their lack of commitment or motivation. **Secondly**, the outcome of the practical study revealed to me that my understanding of behavioural change was influenced by Berkman's (2018) literature and my CBC™ training, which emphasized the necessity of having the “will” and the “way” to achieve change (refer to Learning Area 2, Learning Outcome 1 for details).

After further introspection, I learned that I had assumed that possessing both the “will” and the “way” was sufficient to alter behaviour. This insight was crucial for my coaching practice, as it highlighted that I had previously focused solely on developing coachees' skills, capabilities, and knowledge, under the assumption that their motivation was the only other required element for successful change. **Thirdly**, in analyzing the **origin** of my preference for working with motivated coachees, I learned that my perspective and worldview was profoundly shaped by my background in elite sport, where athletes consistently demonstrated unwavering commitment and personal accountability for change. This experience led me to assume and expect that coachees who voluntarily sought coaching from me were already motivated and ready to change.

INTERNAL COACHEE (AT) DONE DIFFERENTLY

In critically reflecting on and analyzing these three insights concerning my coaching practice with my internal coachee (AT), I concluded that there were **four distinct coaching approaches** that I would do differently, given the opportunity. **Firstly**, I ascertained that I could have more effectively identified their stage of readiness and tailored my coaching approach to align precisely with their specific stage of **readiness to change**. As mentioned above, this highlighted a gap in my knowledge and identified an area for further development of my coaching practice. **Secondly**, I recognized that I could have delved more deeply into the source of their **motivation** to change, specifically determining whether their drive to change was intrinsically or extrinsically motivated. **Thirdly**, in examining and

evaluating alternative coaching strategies, I realized that I could have leveraged the Hawthorne effect (refer to Learning Area 2, Learning Outcome 1 for details) to encourage them (AT) to take action. By suggesting they find a partner to support them in pursuing their goal, elevating performance or changing behaviour, I could have potentially better equipped them to take action. **Finally**, I could have had them complete the **survey** designed to assess the applicability of methodologies and academic literature concerning the “messy middle” (Brown, 2015, p. 26-28) of performance. This would have allowed me to uncover and pinpoint the specific challenges they were experiencing and enabled me to tailor my coaching to address those precise areas.

SURVEY AS ROADMAP

In further reflecting on and assessing the use of the survey beyond my study, I determined that its creation was highly advantageous for my practice. The survey could serve not only as a comprehensive roadmap but also as an **assessment** tool to uncover the specific challenges coachees were experiencing in their pursuit of a goal, performance enhancement or behavioural change. I was genuinely excited about the potential of testing the integration of the survey into my practice and assessing its benefits. However, in critically evaluating how to integrate the survey of the 19 goal-related factors into my practice, I concluded that it would not be appropriate to use the survey directly with my coachees who were employees of the premiere partner. Instead, I successfully persuaded the premiere partner to incorporate the 19 goal factors into the redesign of the Leadership Foundations program in Fall 2023 (refer to Learning Area 1, Learning Outcomes 1 to 3 for details) (Evidence - LA2LO3.7 Achieving Goals in LD Content). This enthusiasm was further reinforced during the final debrief interview with survey participants, which will be detailed below.

Having critically assessed my professional and personal experiences related to the factors that hindered individuals from progressing through the “messy middle” (Brown, 2015, p. 26-28) of performance, I will now critically evaluate **three factors** that, conversely, facilitated progress through this phase: **positive thinking/recognizing success, breaking down goals/tasks and reflecting**. By analyzing and integrating insights from both the theoretical and practical learning of this phase, I aim to further develop and enhance my coaching practice.

POSITIVE THINKING /RECOGNIZING SUCCESS

In critically analyzing the factors deemed important in the academic literature pertaining to the “messy middle” (Brown, 2015, p. 26-28) of performance and substantiated by individuals through their lived experiences during my study, I concluded that employing neuroscience, specifically **positive thinking/recognizing success**, was identified by the largest number of individuals, five out of 20 (25%), as the key factor facilitating navigation through the challenges of performance (Evidence – see previous LA2LO2.9).

Assessing the applicability of this finding, I determined that positive thinking and recognizing success was likely a strategy relevant to all my coachees, who were predominantly employees of the premiere partner. Their focus was almost exclusively on their areas of improvement, **neglecting to recognize their own successes and those of their team**. In critically analyzing the impact that this finding on my coaching practice, I concluded that my interest in neuroscience has naturally enabled me to integrate the benefits of the brain as a strategy with my coachees. I elevated its importance by focusing on the coachee’s strengths and successes during coaching sessions (Evidence - LA2LO3.8 Example of Strength Use).

Reflecting on how **positive thinking and focusing on success would impact future clients**, I concluded that the employee culture within other companies likely also neglected to celebrate individual and team successes, thereby not taking full advantage of the benefits of neuroscience in navigating through their respective “messy middle” (Brown, 2015, p. 26-28) of performance.

In comparing the differences between the academic literature and the applicability of said literature to individuals through a practical study, I was surprised, disappointed and somewhat confused that having **fun** was not mentioned by any individual at any point in their 60-day goal pursuit journey. It was one of only four factors, from the 19 found in the literature, that were not mentioned. The other factors were goal in relation to participants’ identity, goal aligned with work/life and goal aligned with passion/purpose. Reflecting on the **root cause of my feeling**, I concluded that, from my perspective, having **fun** was so fundamental to the overall outcome of achieving a goal, that I could empathize with individuals who were not having fun and could understand how a coachee would fall short of their goal.

This realization led me to question and be curious about the responses and their impact on the outcome of individuals' goal pursuit journey. In analyzing the quantitative data pertaining to fun as a factor to performance, I discovered that nine out of the 16 participants (56%) who completed all three surveys either **disagreed or strongly disagreed** that they were having fun pursuing their goal (Evidence – see previous LA3LO3.6 Q15). Critically reflecting on **fun** as a factor in achieving a goal, elevating performance or changing behaviour, especially while in the “messy middle” (Brown, 2015, p. 26-28) of performance, I determined that I needed to acquire more knowledge and continuously evaluate the impact of this factor on performance and my practice.

BREAKING DOWN GOALS/TASKS

The **second factor** I will critically reflect on, identified as important in the academic literature on the “messy middle” (Brown, 2015, p. 26-28) of performance and corroborated by study participants, was **breaking down tasks and goals. This approach was deemed crucial for** successfully navigating this phase by three out of 20 participants (15%) (Evidence – see previous LA2LO2.9). In reflecting on and analyzing my **feelings** about this finding, I was delighted to discover that it was a straightforward, practical and easily implementable strategy for my coachees in this challenging stage of performance.

In examining if and how I had integrated this finding into my coaching practice, I concluded that since learning the value of breaking down tasks and goals in Fall 2022 during my practical study with a range of individuals, I had regularly incorporated this concept into my practice and leadership development training. This was especially true with younger coachees at the beginning of their professional careers, those experiencing emotional overwhelm or those grappling with complex challenges.

REFLECTING

The **third factor** I will critically analyze, identified by the same number of individuals, three out of 20 participants (15%), as the importance of breaking down tasks and goals for successfully navigating the “messy middle” (Brown, 2015, p. 26-28) of performance, was **reflection** (Evidence – see previous LA2LO2.9). In critically reflecting on the findings, I was prompted to analyze my own practice. I concluded that while I had fully integrated the strategy of breaking down tasks/goals into my practice, I had not done the same for the integration of

reflection. Analyzing the root cause for this, I discovered that it was likely due to the majority of my practice involving coachees from the premiere client, who, as mentioned earlier, only had access to two coaching sessions. Thus, reflection was not prioritized as a strategy due to the relatively short-term nature of the coaching relationship.

Reflecting on and examining **what I did well**, given the limited number of coaching sessions with each coachee, I successfully found an alternative approach by proposing to the premiere client to integrate the Gibbs' Reflection Cycle (1988, p. 49-50) into the redesign of one of the leadership development programs. This proposal subsequently received positive feedback from participants (Evidence – LA2LO3.9 Participant Feedback – Gibbs' Reflection Cycle in LD Content).

In critically reflecting on and analyzing my coaching practice, I identified **two areas** where I **fell short**. **Firstly**, I did not allocate sufficient time and space for self-reflection following my coaching sessions. **Secondly**, when I did engage in reflection, I disproportionately focused on my perceived negatives rather than valuing and evaluating the positives of my coaching practice, which I mentioned earlier was a strategy I employed with my coachees.

FIRST ADDITIONAL/UNINTENDED INSIGHT: SELF-EFFICACY AND CONFIDENCE

Having assessed my professional and personal experiences related to certain factors that hindered and facilitated individuals' progression through the messy middle" (Brown, 2015, p. 26-28) of performance, I will now analyze and integrate **three additional and unintended insights** from the practical learning of this phase to further develop and enhance my coaching practice, with the objective of substantiating my claim for credit.

The **first additional and unintended insight** emerged when 13 out of 20 participants (65%) who took part in the final debrief interview of the practical study, which aimed at analyzing and assessing the applicability of methodologies and academic literature concerning the "messy middle" (Brown, 2015, p. 26-28) of performance, were asked when and how they knew whether they were or were not going to achieve their goal following their 60-day journey. Reflecting on their responses, I was **pleasantly surprised** that 12 out of the 13 participants (92%) interpreted the question from a positive perspective despite not having fully achieved their goal. Upon examining the source of their interpretation, I learned

that they attributed their partial achievement to experiencing success/progress, feeling self-confident, having a key person believe in them or experiencing a physical reaction when their behaviour did not align with their goal.

In analyzing my knowledge of Bandura's (1997) self-efficacy theory of motivation (refer to Learning Area 2, Learning Outcome 2 for details), I concluded that, where appropriate, I attempted to integrate the theory into my practice by serving as that pivotal individual who genuinely believed in their coachees. Considering and examining the underlying reasons for why it was important for me to authentically adopt this approach, I realized that self-efficacy theory resonated deeply with me because it aligned with my overarching **purpose of supporting coachees** in their pursuit of their own performance excellence, as mentioned above. Additionally, it reinforced my belief in Kotler's assertion that "we are all capable of so much more than we know" (2021, p. 13) (refer to Learning Area 2, Learning Outcome 1 for details).

Reflecting on the impact of integrating this theory into my practice, I felt excited about its potential benefits. I assessed that the vast majority of coachees from the premiere client's leadership development programs had expressed during our coaching sessions that they lacked confidence in their skills, capabilities and knowledge.

SECOND ADDITIONAL/UNINTENDED INSIGHT: ADDED VALUE TO PARTICIPANTS

The second set of additional and unintended insights, which served to unexpectedly reinforce previous findings, emerged when I asked participants in the final debrief interview to reflect on their 60-day goal pursuit journey and identify the "**one thing**" they most wanted to learn or understand about their "messy middle" (Brown, 2015, p. 26-28) of performance.

For context, in reflecting on the importance I placed on adhering to ethical principles in executing the study to analyze and assess the applicability of methodologies and academic literature concerning the "messy middle" (Brown, 2015, p. 26-28) of performance in practical contexts through an inquiry with a range of individuals, I, as a coach, aimed to exceed those ethical principles identified by Gray (2022, p. 83-84):

- Avoid harm to participants
- Ensure informed consent of participants
- Respect the privacy of participants
- Avoid the use of deception

If one end of the ethical spectrum was avoiding doing harm, my intention was to be at the other end by providing study participants with a value-added experience, beyond their learning from the study itself. Reflecting on my feelings and assessing the outcome, I was proud that I kept my word. During the final debrief interviews, I asked every participant to reflect on their experience over the 60-days and identify the “one thing” that they wanted to learn or know most about the “messy middle” (Brown, 2015, p. 26-28) (Evidence – LA2LO3.10 Added-Value to Study Participants). Considering the importance of understanding the “one thing,” it became evident that this insight revealed what was most crucial for participants to learn based on their lived experience throughout the 60-day process. Moreover, their insights would serve as key indicators of primary concerns and priorities for my future clients.

In examining the participants’ responses, I identified four requests that multiple participants highlighted as their “one thing” they wanted to learn. These were (Evidence – LA2LO3.11 Summary of Added-Value Requests - p. 56):

- To discover the findings of the study: 7 out of 20 participants (35%)
- How to manage competing priorities: 6 out of 20 participants (30%)
- Desire for a coaching call with me: 5 out of 20 participants (25%)
- Strategies on how to achieve a goal: 3 out of 20 participants (15%)

Reflecting on the responses from survey respondents, I will analyze the impact on my practice based on **two types of requests**: the desire to discover the findings from the study and the strategies on how to achieve a goal. **Firstly**, I assumed that the seven participants who sought the study’s findings were likely coaches themselves, eager to understand the complexities of the “messy middle” (Brown, 2015, p. 26-28) of performance. Clutterbuck and Spence concluded that “it is a misnomer to suggest that coaching can be conducted “goal-free”” (2017, p. 219). I speculated that these coaches wanted to measure their coaching effectiveness in supporting their own coachees to prepare for and move through this challenging phase. **Secondly**, when critically considering how to address the seemingly

large and complex question from the three participants who inquired about how to achieve a goal, I initially felt overwhelmed. However, I soon realized that the key was to have them utilize the survey as a roadmap by aligning their behaviour with the 19 factors. This insight, once again, renewed my excitement about integrating the survey into my coaching practice.

THIRD ADDITIONAL/UNINTENDED INSIGHT: “MESSY MIDDLE” CUTS ACROSS GEOGRAPHY / AGE

The third set of additional and unintended insights emerged from seeking basic information from study participants. Critically appraising and evaluating what **went well** and was a positive outcome of the study, I concluded that, by luck, the **age** and **country of residence of participants** were diverse (Evidence – LA2LO3.12 Study Demographics). Considering and assessing the benefit and impact of the unexpected demographic breakdown, I learned that the “messy middle” (Brown, 2015, p. 26-28) was universally relevant across ages and geographies. Reflecting on the impact of this learning, I determined that this phase would be pertinent to all my coachees. Analyzing the reason for its global applicability, I concluded that it likely stemmed from the fundamental nature of human behaviour, which, much like the methodologies and academic literature on the “messy middle” (Brown, 2015, p. 26-28), was not specific to age or country of residence.

FINAL THOUGHT

In critically reflecting on and analyzing how my coaching practice has developed from the critical insights gained through both the theoretical and practical learning of the “messy middle” (Brown, 2015, p. 26-28) of performance, I concluded that I had become more understanding, compassionate and empathetic. Additionally, I have gained knowledge and become more skillful in supporting coachees who seek my services to achieve goals, elevate performance or change behaviour.

Reflecting on my development, I determined that it was as much about what I learned from the established methodologies, academic literature and practical study with a range of individuals as it was from my own lived experience with the “messy middle” (Brown, 2015, p. 26-28). Had I been one of the participants in my own study, I too would not have achieved my goal of completing my study within the intended timeframe. In critically

reflecting on and appraising my journey and lived experience at navigating the complexities of the challenges of performance, I learned that I too struggled with managing my own competing priorities.

In summary, after critically reflecting on and assessing the impact and applicability of academic literature and methodologies on my coaching practice, I believe that my efforts in critically analyzing and developing my coaching practice, through integrating insights from both the theoretical and practical learning of the “messy middle” (Brown, 2015, p. 26-28) of performance, support my claim for credit.

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