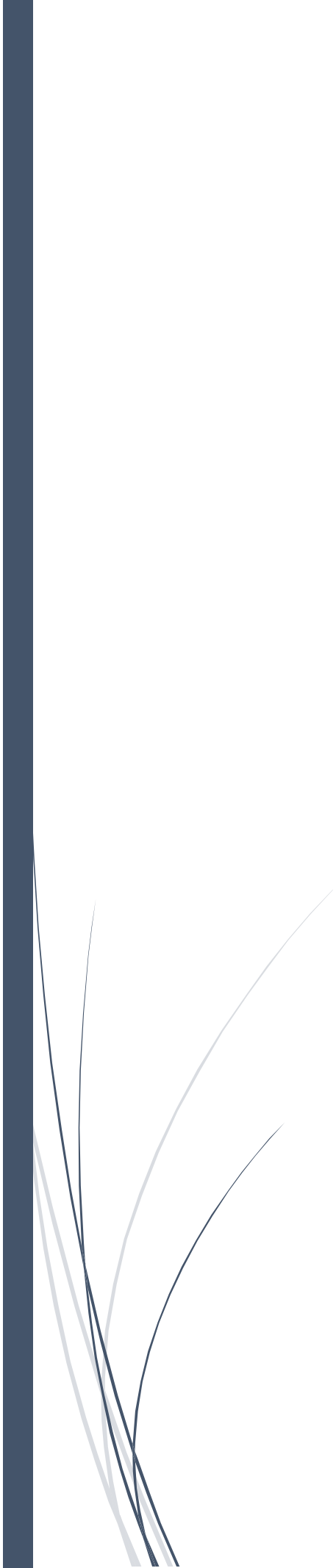




The intended value of coaching in the workplace versus the achieved outcomes: A critical review of coaching at a large financial services organisation in South Africa

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MA IN PROFESSIONAL PRACTICE: COACHING AND MENTORING

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Project Proposal

Context and Justification

Coaching has been offered to employees at the researcher's organisation for several years. This has historically been provided to senior level employees usually when there are behavioural and leadership challenges that need to be addressed. The costs of an executive coach are significantly high, which is usually why it is generally reserved for senior level employees. Despite there being a significant number of employees undertaking coaching within the organisation, there is no information on reasons for coaching (this is managed within individual business units with no clear guidelines), no measurement to indicate the return on investment, and no understanding if the coaching interventions achieved what was intended. In addition, it is not clear if coaching is always the appropriate recommended intervention to meet the goals of the coachee. This is echoed by Passmore and Lai (2019) who talk to the need for better measurement and evaluation of coaching practices and ensuring that the chosen coaching intervention is well-suited to an individual.

The aim of the research project, therefore, is to:

- Identify the reasons for coaching being proposed as an appropriate intervention for employees
- Research and understand the purpose of workplace coaching and comparing it to the reasons for coaching being undertaken at the researcher's organisation
- Researching, analysing, and critically assessing the impact and value of the coaching interventions against the intended impact, based on the feedback received from both line managers, who usually recommend the coaching intervention, and employees who undertake the coaching

Intended Impact of the Research

As the researcher was previously undertaking her coaching practitioner programme and completing the requisite coaching hours, she provided coaching support to employees at a non-managerial level in the organisation at no cost. Anecdotal feedback received indicated that these employees had similar needs as senior level employees that may have been addressed by a coaching intervention and would have considered it a significant benefit to their development if this was offered to them. This was, however, not the case due to the business unit often not affording the cost of an executive coach or based on the researcher's perception, there being insufficient return on investment when it is a junior level employee requiring the intervention.

The results of the research will provide valuable information to the organisation on why and how coaching is being implemented; if there is alignment between a recommended coaching intervention and what is achieved; and to compare the purpose of workplace coaching to why it is undertaken at this organisation.

This information will assist the organisation in the creation of a standardised framework and toolkit, which will provide clear guidelines on when coaching should be utilised as a developmental intervention for employees, as well as highlighting the value that can be derived from such an intervention when appropriately implemented. This has been similarly cited in Bwengi (2015) who investigated the effects of coaching at a bank in Kenya due to there being extensive coaching throughout the organisation, but no clear frameworks guiding the practice or understanding the impact of coaching.

The researcher seeks to establish if offering coaching to all employees in the organisation would have a significant positive impact on the employee, be it for their development or improved wellbeing, which would ultimately be of benefit to the organisation.

Outlined Intention

It is the hypothesis of the researcher that many line managers may suggest coaching as an intervention for an employee's development or to deal with poor performance in their jobs when there may be other more suitable interventions to respond to the challenge. In many instances, counselling or mentoring may be more appropriate, or guiding the employee through a supportive performance improvement programme if the issue is one directly related to the technical competencies of the role.

Expected Learning Outcomes

The expected learning outcomes for the researcher are as follows:

- Design and conduct a work-based research project at the researcher's place of employment with consideration of, and adherence to, all ethical issues pertinent to this project
- Analyse, understand and critically evaluate the research data and provide a detailed report to assist the organisation in understanding how to move forward with the most suitable approach to coaching in the workplace
- Provide recommendations on future research and actions to be undertaken based on the research findings

- Critically reflect and detail lessons learned as an insider researcher

Ethics and Insider Research Considerations

Being an insider researcher conducting this study, it is important to understand both the opportunities and challenges associated with this role. According to Saidin (2016), some of the benefits include having a deeper understanding of the context and issues being studied, having easier access to the participants, better rapport being a colleague to them, and having knowledge of the broader environment such as the cultural norms of the organisation, which assists the researcher to more accurately interpret and understand the data.

There are, however, certain challenges to also consider and which to mitigate against. These include being potentially biased due to being a part of the group being studied, which can impact how the data is being interpreted. In addition, confidentiality may inadvertently be compromised due to being familiar with the subject matter as well as many of the participants. (Saidin, 2016)

To mitigate these risks, the researcher has obtained the support of the Head of Learning, who will sign off on the approach to the research, the research questions and oversee the analysis of the data. In addition, coaching is a personal endeavour for many people, which means that great care must be taken in how participants are approached and providing certainty that their information will be maintained with the greatest of confidentiality. The researcher will ensure that this commitment is reiterated at every point in the research process and all care is taken with the data of the research participants.

Conclusion

In summary, the research hopes to understand if there is alignment between the recommendations for coaching by the line manager and the experiences of the coachees and, in addition, if the coachees experience the positive effects of coaching despite the intervention being recommended by another person which, in this organisation, is the line manager.

Introduction

The existence of workplace coaching to enhance performance and development in organisations has been in existence for many years (Theeboom, Beersma and van Vianen, 2014). The research shows that in organisations where coaching skills are implemented, there

is improved performance, empowered employees and potentially higher staff retention (Tompkins, 2018). Similarly, coaching has been offered to employees at the researcher's organisation for several years. Despite there being a significant number of employees undertaking coaching within the organisation, there is, however, no information on why coaching is being proposed, no evaluation practices to indicate the return on investment, and no understanding if the coaching outcomes achieve the intentions.

The aim of the research project, therefore, is to:

- Identify the reasons for coaching being proposed as an appropriate intervention for employees
- Research and understand the purpose of workplace coaching and compare it to the reasons for coaching being undertaken at the researcher's organisation
- Researching, analysing, and critically assessing the impact and value of the coaching interventions against the intended impact based on the feedback received from both line managers, who usually recommend the coaching intervention, and employees who undertake the coaching

At the end of the research project, the expected learning outcomes are to:

- Understand how to design and conduct a work-based research project at the researcher's place of employment with consideration of, and adherence to, all ethical issues pertinent to this project
- Analyse, understand and critically evaluate the research data and provide a detailed report to assist the organisation in understanding how to move forward with the most suitable approach to coaching in the workplace
- Provide recommendations on future research and actions to be undertaken based on the research findings
- Critically reflect and detail lessons learned as an insider researcher

The results of the research will provide valuable information to the organisation on why and how coaching is being undertaken by employees; if there is alignment between a recommended coaching intervention and what the coachee achieves from the intervention; and to compare the purpose of workplace coaching to why it is undertaken at this organisation. This information will assist the organisation in the creation of a standardised framework and toolkit, which will provide clear guidelines on when coaching should be utilised as a developmental, or otherwise, intervention for employees, as well as highlighting the value that can be derived from such an intervention when appropriately implemented. In addition, the findings from this study will contribute to the development of guidelines for implementing

effective coaching interventions, which can serve as a framework for other organisations that may be facing similar challenges.

Literature Review

Coaching in the workplace has generally been seen as an effective tool for enhancing the performance of employees, furthering employee development and improving leadership capabilities (Theeboom, Beersma and van Vianen, 2014). With many organisations seeking the competitive edge, coaching is viewed as a mechanism to bring about the desired behavioural change to achieve better business results (Tompkins, 2018). Considering the significant cost to bring in external coaches (Cannon-Bowers *et al.*, 2023), however, a critical question emerges: Does workplace coaching achieve what was intended?

This literature review seeks to critically analyse the research on coaching in the workplace, with specific focus on the gap between why coaching is initiated and its actual achieved outcomes. The key themes explored are:

- The intended value of coaching in the workplace
- The effectiveness of coaching in the workplace
- Workplace coaching in the financial services industry globally, in Africa and South Africa

The review excludes literature that focuses on manager as coach and instead limits the research to internal or external coaches that are solely providing a coaching service to the organisation.

Definition of Coaching and Workplace Coaching

Coaching has been defined as “a one-to-one relationship in which the coach and coachee work together to identify and achieve organisationally, professionally, and personally beneficial developmental goals” (Sonesh *et al.*, 2015) while workplace coaching specifically has been defined as a “one-to-one custom-tailored, learning and development intervention that uses a collaborative, reflective, goal-focused relationship to achieve professional outcomes that are valued by the coachee” (Bozer and Jones, 2018).

What has further emerged in the literature is the concept of “executive coaching” which appears to separate itself by being coaching aimed specifically at senior or c-suite managers with the intent of improving aspects of professional performance such as leadership

capabilities and personal aspirations to the ultimate benefit of the organisation (Passmore and Lai, 2019).

Intended Value of Coaching in the Workplace

Workplace coaching was initially undertaken to enhance performance of employees, while executive coaching, as previously defined, was used to improve the performance and leadership capabilities of its senior management and c-suite managers in the workplace (Grant, 2017; Passmore and Lai, 2019). Organisations have since come to look at coaching, in an ever-changing environment with greater levels of complexity, as a way to support employees through organisational and cultural change. Coaching is now seen as the key tool in the organisational change process (Grant, 2017). Related to this, coaching has been used as a tool to enhance the individual's development and performance and aligning individual expertise with organisational goals, in addition to promoting wellbeing (Grant, 2017; Kruger and Terblanche, 2024).

As the world has become more globalised and work environments have become more diverse, there is increased pressure to retain valued employees. Coaching has since been recognised and implemented to also empower employees. This leads to them to feeling valued and therefore increases the chances that they would remain with their organisations (Tompkins, 2018).

As technology continues to advance at such a rapid rate, there is a need for the workforce to be more effective and efficient in their operations, and to improve productivity. Many organisations have turned to coaching to help with this. While coaching may have previously been used to assist poor performers, it is now also used to work with top leaders in the organisation to better strategise, lead their teams, and for supporting their talented employees as they are promoted in the organisation (Tompkins, 2018).

As more recent literature was reviewed, it was clear that the reasons for coaching in the workplace were significantly impacted by the global COVID-19 pandemic. Whilst the pandemic has since passed, what has remained is a need to focus on the mental health and wellbeing of employees with organisations understanding that they now need to focus on the employee more holistically (Weinberg and Scandura, 2024). This was further supported by van Nieuwerburgh et al. (2022) who suggests that coaching could be helpful to employees to stay engaged, productive and to look after their wellbeing.

Addison and Shapiro (2023) also discuss the need for leaders to develop and sustain healthy organisations which was exacerbated by the global pandemic. As the pandemic effects are starting to diminish, there is still great social and political unrest worldwide, which leads to the need for more diverse and inclusive work cultures. Leaders are expected to drive business results but, at the same time, also watch over the mental and physical wellbeing of their employees (Addison and Shapiro, 2023).

Impact and Outcomes of Workplace Coaching

There is an overwhelming amount of literature that shows that workplace coaching is beneficial at both an individual employee level and at an overall organisational level.

At an individual level, coaching has been shown to help the learning and development of employees which leads to an improvement in both skills and competencies. Coaching can also assist with improving an employee's performance with the caveat that this needs to be executed within a structured programme format and with clearly defined goals and outcomes. Further to this, employees can gain an increased sense of self-confidence and self-worth after they have engaged in a coaching intervention (Theeboom, Beersma and van Vianen, 2014; Jones, Woods and Zhou, 2018; Tompkins, 2018; Weinberg and Scandura, 2024).

It is also shown that coaching also improved leadership capabilities. Executive coaching specifically has a significant impact on the effectiveness of leaders and, once again, can improve organisational culture and performance (Addison and Shapiro, 2023). Executive coaching was also found to be particularly effective in promoting behavioural change in leaders with reference to wellbeing (Nicolau *et al.*, 2023).

The COVID-19 pandemic indicated how important it was for organisations to attend to the wellbeing of their employees and that workplace coaching had already been shown to not only improve performance but also the wellbeing of employees. It was reported that coachees felt more confident after the coaching and this had a positive impact on both their wellbeing and professional life (van Nieuwerburgh *et al.*, 2022).

At an organisational level, employee retention may increase due to the sense of empowerment and value felt by the employee – they are happy to work for an organisation that invests in their development. Coaching can also lead to a healthier organisational culture due to more open communication and collaboration and an overall sense of employee satisfaction. Finally, the research shows that coaching can have a positive impact on different business measures

and can lead to increased innovation. While this may prove the value of coaching in driving organisational success, this was, however, reported by employees and a clear correlation is not always proven (Theeboom, Beersma and van Vianen, 2014; Jones, Woods and Zhou, 2018; Tompkins, 2018; Weinberg and Scandura, 2024)

A study conducted at a manufacturing company in Indonesia aimed to understand if coaching practices affected employee intrinsic motivation, work commitment and individual performance. The results from the study showed a positive correlation between workplace coaching and intrinsic motivation and work commitment further strengthening the argument that coaching has positive effects at an organisational level (Haryanto, 2021).

Coaching in Financial Services

As the focus of the literature review narrowed to coaching in the financial services industry specifically, there was not much research to be found. Of the studies that were identified, most did not focus on the effectiveness of coaching, however from those sourced, there was a definitive indication of the positive impacts of coaching in the workplace.

Two studies conducted within the banking sector in Ireland and Lebanon aimed to understand the relationship between workplace coaching and employee performance. The studies affirmed the previous research that coaching does have a significant positive impact on employee performance, with the key findings including higher levels of motivation and increased effectiveness (Achi and Sleilati, 2016; O'Connell, 2019). In contrast, a study conducted with managers within an Italian banking group found that there was not much improvement in performance, however coaching had positive impact on the emotional regulation abilities of the managers (David *et al.*, 2016).

Coaching within the financial services industry in Africa and South Africa

Very little research related to the effectiveness of workplace coaching could be sourced within the financial services industry in Africa and in South Africa. Of the studies that were sourced, it was found that employee coaching did not significantly affect organisational commitment, particularly when employees were not secure in their employment. (Chidiebere and Tunde, 2024) It was however found that coaching did have a positive impact on employee performance. (Bwengi, 2015) No studies could be found on the intent or effectiveness of workplace coaching within the financial services industry in South Africa, which indicates a gap in the research.

Conclusion

The literature is clear in showing that workplace coaching is effective in improving employee performance, improving self-confidence, enhances leadership skills, and has a positive impact on employee wellbeing. This, in turn, can lead to higher organisational commitment and employee retention, and potentially improve business results. In addition, more recent studies show that coaching has been especially helpful during and after the global COVID-19 pandemic. This has now led to organisations recognising the need to focus on the holistic wellbeing of employees and not merely on work performance – coaching has proved to be an effective tool in this aspect.

Despite all the literature pointing towards the effectiveness of workplace coaching, very little literature has been found on the match between the intention of coaching and the directly related outcomes. There is a particular lack of information on this within the financial services industry. This review underscores the need for further research into the reasons for workplace coaching within the financial services industry in South Africa and if the impact or outcomes of the coaching interventions align to these reasons.

Methods

Research Paradigm

This study adopts the ontological position of constructivism which asserts that reality is subjective and must be considered within the context of individual experience and social factors such as language and culture (Buriro, Ednut and Khatoon, 2020). The epistemological position adopted is that of interpretivism, which recognises the subjective nature of a person's reality, and that knowledge must be derived through understanding these social realities and through interpretation (Buriro, Ednut and Khatoon, 2020). Quantitative data and qualitative data can complement each other within the interpretivist paradigm by providing a more holistic understanding of the research challenge. Quantitative data provides broad context through patterns and trends in the data, while qualitative data provides depth of insights into the person's experiences. This paradigm is suitable for understanding the subjective meanings individuals attach to their experiences and was chosen because it aligns to the aim of the study, which is to understand why coaching is recommended for employees in the workplace and comparing that to the feedback received on their actual coaching experience.

Research Design

The research employs a mixed-methods approach, integrating both qualitative and quantitative methods, to provide both a comparative view of experiences between line managers and coachees, and deeper insights into the reasons for their responses. A mixed methods approach is often used when a single method cannot provide the depth of insight required to respond to the specific research problem (Dawadi, Shrestha and Giri, 2021). While quantitative methods do not typically fall within the interpretivist research paradigm, comparing the experiences of both line managers and coachees required a survey with similar questions to be deployed to both groups; this required a quantitative research approach. To further understand the coaching experiences of the line managers and the coachees, a set of qualitative interviews was also required.

Participants

The sample population was randomly selected from the set of employees who had undertaken a coaching intervention within the organisation in the last year. The line managers of these employees were also identified and asked to complete a similar questionnaire to obtain a comparative sample. Due to participation being voluntary and responses being anonymised to allow participants to safely participate and share confidential information, a direct comparison between a coachee and their line manager was not drawn. The study therefore provides a generalised response from line managers and from coachees.

Data Collection

Quantitative Data: The quantitative approach used was that of a survey, administered to a set of line managers and coachees. A survey was chosen because it allowed for the quick collection of responses and the use of standardized questions to obtain a clear comparison of responses between line managers and coachees. The drawback of using a survey is that it has limited depth of responses and could potentially lead to low response rates – employees may not have felt motivated to complete the survey.

Qualitative Data: To validate and obtain deeper insights from the responses in the survey, a set of one-on-one unstructured interviews were conducted with both line managers and coachees. The benefit of the interview is that it provided the researcher with the opportunity to delve deeply into the experiences and emotions of the participants and to understand the motivation and reasoning for their part in the coaching process. While the unstructured

interviews made it challenging to compare responses and were time-consuming, it allowed for unplanned insights to emerge and provided the researcher with additional information on the effectiveness of coaching in the organisation, which may not have been gathered via a structured interview.

Data Analysis

Quantitative Data: The quantitative data were analysed using descriptive statistics and correlation analysis to provide comparisons as follows:

- A comparison between the intent of coaching being recommended by line managers and their perceived outcome of the intervention for the employee
- A comparison between the intent of coaching being undertaken by employees and their reported outcome of the intervention
- An overall comparison of the intent of coaching against the outcomes within the organisation

Qualitative Data: The qualitative data were analysed using thematic analysis to understand the reasons for recommending coaching and the outcomes achieved for both the line manager and the coachee.

Ethical considerations

Ethical approval for the study was obtained from the University of Wales Trinity Saint David's Ethics Committee. In adhering to the Protection of Personal Information Act (POPI Act 4 of 2013) of South Africa, which aims to promote the protection of personal information processed by public and private bodies, the researcher was not allowed to directly access the participation data. To ensure adherence, the survey was distributed by an administrator within the organisation who had worked with the participants in co-ordinating the coaching interventions, and responses received were anonymised through Microsoft Forms.

In the communication accompanying the survey, potential participants were informed that participation was voluntary and that all responses would be kept confidential and could not be linked back to them as individuals. In addition, it was clearly stated that no individual responses would be shared, and that data would be consolidated into overall themes and results. In the communication, participants were also asked to provide their email addresses if they were willing to participate in a follow-up interview. In this way, they were willingly providing their information, and no personal information was being shared without permission.

The value of confidentiality in the coaching relationship is well-understood (Ebrahimi, 2024) which is why it was decided to conduct one-on-one interviews rather than focus groups, where there was a risk that participants would not feel comfortable to share their reasons for coaching or provide detail on their experience in a wider group.

During the interviews, participants were once again assured that their feedback would be kept confidential. They were also asked if they would be comfortable if the interview was recorded and informed that this was for the researcher's later thematic analysis and only consolidated results would be shared in the research report. They were also made aware that they did not have to share anything or answer any questions with which they were not comfortable.

All interview data was recorded on the organisational laptop computer, which is password protected, and the transcripts downloaded only on the same laptop. No individual interview data was shared with any other person besides the researcher. The research data will be stored for a period of five years and securely deleted according to the organisation's information deletion guidelines.

To adhere to the organisational academic ethical requirements, the researcher was required to complete a non-disclosure agreement which required that the name of the organisation and the identity of the participants not be revealed in the research report, and the appropriate confidentiality be maintained. In addition, the executive head of the area, which is the Group Head of Learning for the organisation, was required to provide permission for such a study to take place. The researcher was allowed to distribute the survey to a maximum of fifty (50) participants, based on the academic research policy of the organisation.

The most significant risk and potential adverse outcome was that of breaching confidentiality. This was mitigated through the various mechanisms indicated in the previous section.

Insider Research

An insider researcher can be defined as one that shares similar characteristics with the group being researched which could be gender, ethnicity or culture but it has also been described as a member of the group that is being researched (Saidin, 2016). In this study, the researcher can be considered an insider researcher, being a permanent employee of the organisation conducting a research study with colleagues. In addition, the researcher is an internal coach within the organisation and has first-hand experience of the topic being researched, however

has not been a coachee within the organisation nor a line manager who has recommended coaching. Further to this, the researcher did not have any prior relationship with most participants. A few interviewees were, however, colleagues from the same department, who formed part of the research group. This did not appear to have any negative influence in the interviews but may have allowed participants to be more comfortable in sharing due to the collegial nature of the relationship. This has been cited as a benefit of being an insider researcher (Saidin, 2016).

Due to the researcher being an internal coach and having clear hypotheses when commencing the study, there was a need to remain aware of the biased views of how coaching was being experienced in the organisation. This was mitigated through the clear questions asked in the survey where responses could not be misinterpreted, however it may have emerged during the interviews due to it being unstructured and more conversational. The researcher remained aware of this and sought the assistance of a colleague unrelated to the study when conducting the thematic data analysis. This was to ensure that there was an objective view of the interview data.

Findings

The literature has indicated that coaching in the workplace has various positive effects, ranging from performance enhancements, organizational commitment, employee retention, to improving business results (Theeboom, Beersma and van Vianen, 2014). However, in none of the literature has there been an indication of the outcomes of workplace coaching when it is recommended by a different person from the coachee, most likely the line manager or head of department. One of the aims of the study was to understand if there would be alignment when coaching was recommended by another person than the coachee.

The purpose of this section is to present and analyse the findings of this study, which was to examine the alignment, if any, between the intended value of workplace coaching and the achieved outcomes within a large financial services organisation in South Africa. In addition, the study aimed to determine the overall effectiveness of coaching within this organisation.

The section is structured according to the research considerations which include a detailed breakdown of responses from both the survey and qualitative interviews that were conducted, together with a thematic analysis of the qualitative data. By integrating these findings, the section intends to provide a deeper understanding of the value of workplace coaching and highlight the factors that either contribute towards workplace coaching effectiveness and those

that could potentially inhibit it, particularly when coaching is recommended by someone other than the coachee, in this case the line manager. The discussion will highlight the implications of these findings for workplace coaching practices and offer recommendations to improve the effectiveness of coaching interventions. It concludes with an overview of the research results and implications for future research.

Research Considerations

Due to the organisational restrictions on academic research within the organisation, a maximum of 50 surveys were sent out to employees that had participated in a coaching intervention in the past year; these were split between 25 to coachees and 25 to the direct line managers of these coachees. In total, 20 employees responded to the surveys, consisting of 13 coachees and 7 managers, representing a completion rate of 40%. While the ideal outcome would have been for an equal number of coachee and line manager responses, this could not be controlled due to participation being voluntary. Reminders were sent out to the potential participants to increase participation but, due to the restriction on the number of surveys being issued and participation being voluntary, this number could not be increased.

The survey contained nine questions that were similar in format for both line managers and coachees. The questions and response options are presented below.

	Coachee Questions	Line Manager Questions	Response Options
1	What is your gender?	What is your gender?	• Male • Female • Prefer not to say
2	What is your tenure in the organisation?	What is your tenure in the organisation?	• 0-5 years • 6-10 years • 10+ years
3	What is your workforce level in the organisation?	Not asked	• Executive • Managerial • Non-managerial
4	What were the reasons for your requesting or agreeing to participate in a coaching intervention?	What were the reasons for your recommending or agreeing to your team member participating in a coaching intervention?	• Behavioural shift • Technical skills development • Poor performance management • Better stress management • Other (asked to provide the reasons)
5	In your opinion, the coaching intervention	In your opinion, the coaching intervention	• Strongly Agree • Agree

	achieved what was originally intended.	achieved what was originally intended.	• Neutral • Disagree • Strongly disagree
6	What were the changes you experienced once the coaching intervention had been completed?	What were the observable changes in the team member once the coaching intervention had been completed?	• Behavioural shift • Technical skills development • Poor performance management • Better stress management • Other (asked to provide the reasons)
7	As an employee, you would take up another coaching intervention in the future, should the need arise.	As a line manager, you would continue to recommend coaching for your team members.	• Strongly Agree • Agree • Neutral • Disagree • Strongly disagree
8	Please provide reasons for your answer	Please provide reasons for your answer	Free text
9	Are there any further comments on the coaching intervention you would like to add?	Are there any further comments on the coaching intervention you would like to add?	Free text

In addition, survey respondents were given the option of opting in to a further interview should they wish to do so. The initial intention was to complete further interviews with 5 line managers and 5 coachees, however there were only a few survey participants that were willing to complete a follow-up interview (3 coachees and 2 line managers). Despite the smaller than expected sample, the interviews still provided rich insights that are discussed in further detail here.

While the study included a mixed-methods approach, the data is weighted towards qualitative responses. This has led to a text-heavy analysis of the data due to the thematic analysis conducted on the open-ended questions and the interviews.

Overview of Key Findings

This study proves that there is thematic alignment between the reasons for initiating coaching in the organisation and the reported outcomes. This was repeated in the comparison between line manager recommendation and their perceived outcome of coaching for their team members, and in the comparison of the coachee experience as well. The data shows that the dominant reason for coaching being initiated and undertaken is to assist with behavioural

change. This is the reason cited most often by both line managers and coachees as to why coaching is initiated and what is achieved.

There were no significant surprises in the data with the only exception being a higher reported percentage of stress management outcomes of coaching (14%) versus the reason for initiating (6%). This indicates that coaching could assist with matters that have not been identified as the key reason for taking it up.

Overall, there is resounding support for the value of coaching in the organisation and respondents being very willing to take it up again in the future (85%) and to recommend it for their teams (100%).

Detailed Analysis and Findings

Demographic Analysis (Questions 1-3)

Demographic make-up of coachees

Female coachees made up 84% of the respondents and male coachees 16%, which showed that coaching in the organisation is heavily weighted towards female employees (see figure 1 below). Almost 62% of the coachee sample had been employed in the organisation for longer than 10 years and 38% in the 6-10 year category (see figure 2 below). No respondents were in the less than 5 year tenure category. From a workforce level perspective, this was weighted towards managerial level staff (69%) versus only 15% of non-managerial staff and 15% at the executive or c-suite level (see figure 3 below).

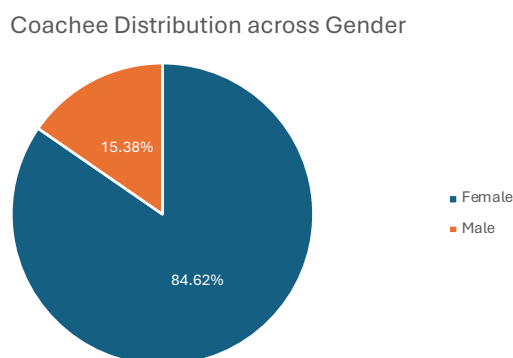


Figure 1

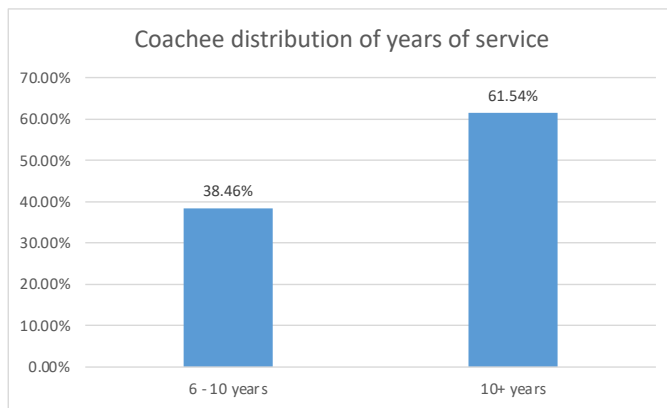


Figure 2

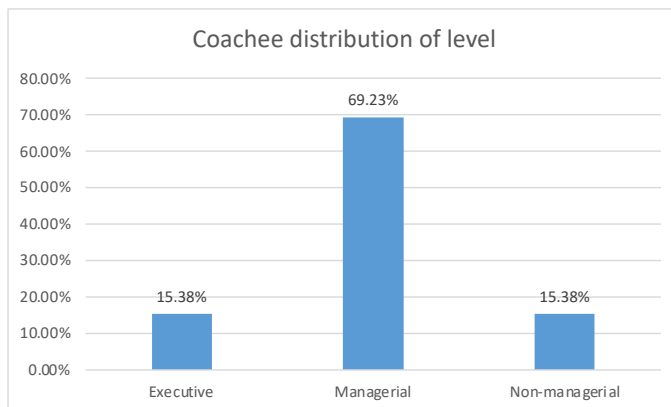


Figure 3

Demographic make-up of line managers

There was a negligible difference between the make-up of male and female line managers who recommended coaching for the employees in their teams, with female line managers making up 57% of the sample and male line managers at 43%. Similar to the coachee sample, the majority of line managers had greater than 10 years of tenure in the organisation at 71%, with 14% each in the 6-10 year and 0-5 year category.

Line manager distribution across gender

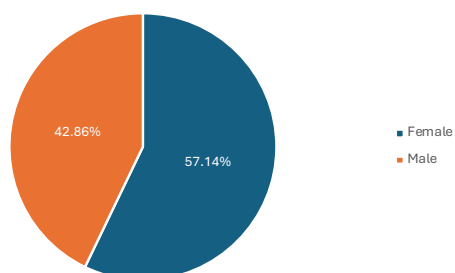


Figure 4

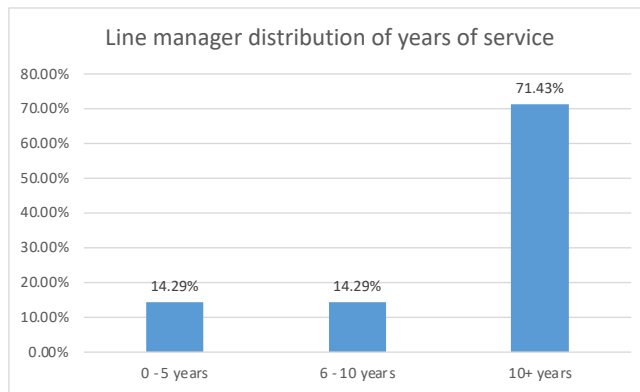


Figure 5

It is noted that coaching is heavily weighted towards females in the organisation. While the reasons for this is unknown, it could possibly be attributed to females being more open to the coaching intervention or the organisation making a concerted effort to provide greater opportunities to females to address the gender inequity challenges. However, the less positive reason could be a bias of managers to implement soft skills intervention for female employees, believing they are best suited to this type of developmental mechanism with technical skill development being reserved for male employees.

Also of note is that coaching is predominantly undertaken by employees with long tenure in the organisation i.e. in the 6-10 year category. This could possibly be attributed to these employees being more senior in the organisation as they have progressed over time with coaching usually being reserved for more senior employees. This is also reinforced by noting that managerial employees form the highest percentage of participants in the survey. These are also the employees who are ready for the next promotion and the data shows that coaching is often offered to these employees to assist with leadership skill and required behaviour shifts for the next role.

While the researcher has been assured there is no policy prohibiting non-managerial employees from being provided with coaching opportunities, the practice indicates otherwise with a tiny percentage of coachees being in the non-managerial category (15%) compared to managerial (69%). This could possibly be due to the organisation not being willing to make the necessary monetary investment in external coaches for employees that are still at a junior level in the organisation. The challenge with this approach is that these employees make up the talent pipeline of the organisation and, having clearly proven the value of workplace coaching within this organisation, it would clearly enhance the effectiveness and performance of the employees, have a positive impact on their organisational commitment and, as the literature has shown, lead to better business results.

Intended Value of Coaching in the Workplace (Question 4)

Coachee Responses

In the survey, respondents were allowed to provide multiple reasons for requesting coaching. Of the respondents, 69% provided only one reason for requesting coaching while 23% provided two reasons and 8% provided three reasons. This could possibly suggest that coaching is used as a targeted intervention in the organisation and could highlight that there are potential opportunities to use coaching as a developmental mechanism that may be missed.

Of the reasons provided for undertaking coaching, 56% were for behavioural shifts or changes, almost 17% for career growth and development, 11% for technical skills development and 6% each for better stress management, business/personal improvement and leadership skill development (see table 1 below).

Table 1

Coachee reason/s for coaching	Percentage
Behavioural shift;	55.56%
Better stress management;	5.56%
Business and personal Improvement ;	5.56%
Career growth;	5.56%
Career management;	5.56%
Leadership;	5.56%
strategy development for further access to opportunities within the market;	5.56%
Technical skills development;	11.11%
Grand Total	100.00%

Line Manager Responses

When asked for the reasons that coaching was recommended, behavioural shifts/changes made up 55% of the reasons provided with 18% for better stress management, and 9% each for developing leadership skills, developing a better brand within the organisation and technical skills development (see table 2 below).

Table 2

Line manager reason/s for recommending coaching	Percentage
Behavioural shift;	54.55%
Better stress management;	18.18%
Develop leadership skills to play a broader Risk Exco role;	9.09%
Help with positioning herself better, develop her brand and striking a better balance between work/life/;	9.09%
Technical skills development;	9.09%
Grand Total	100.00%

It is very evident that coaching is predominantly undertaken in this organisation for the purposes of behavioural shifts, however it is interesting to note that there was a higher percentage of line manager recommendation for coaching for stress management in comparison to coachee intention. There may be a lost opportunity here where the value of coaching for other reasons such as enhanced performance is not realized.

Coaching Achieved what was Intended (Question 5)

Coachee Responses

When asked if they believed that coaching achieved what was expected, 69% strongly agreed and 15% agreed, with 8% being neutral in their response and 8% disagreeing (see figure 6 below).

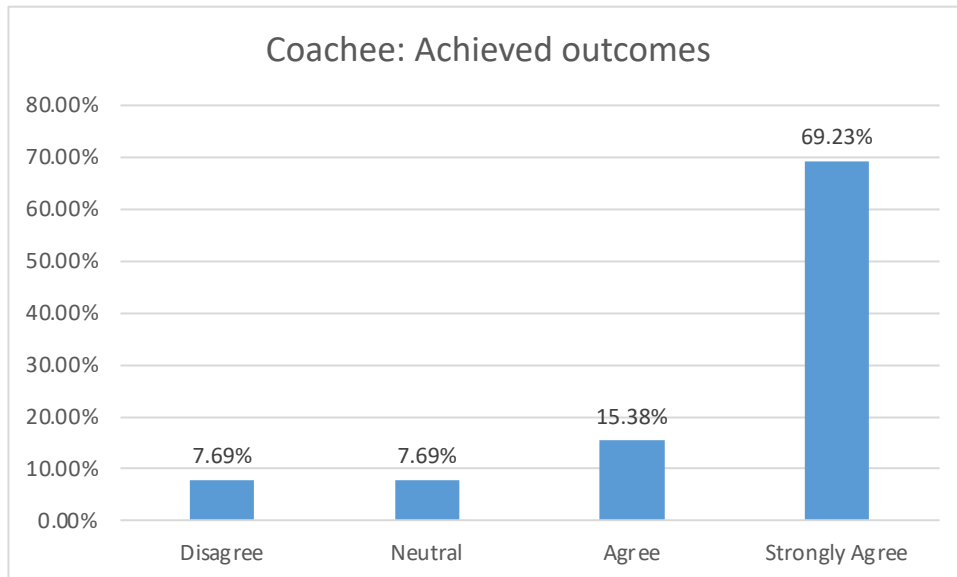


Figure 6

Line Manager Responses

When asked if they believed that coaching achieved what was expected, 43% strongly agreed and 43% agreed, with 14% being neutral in their response and no line managers disagreeing (see figure 7 below).

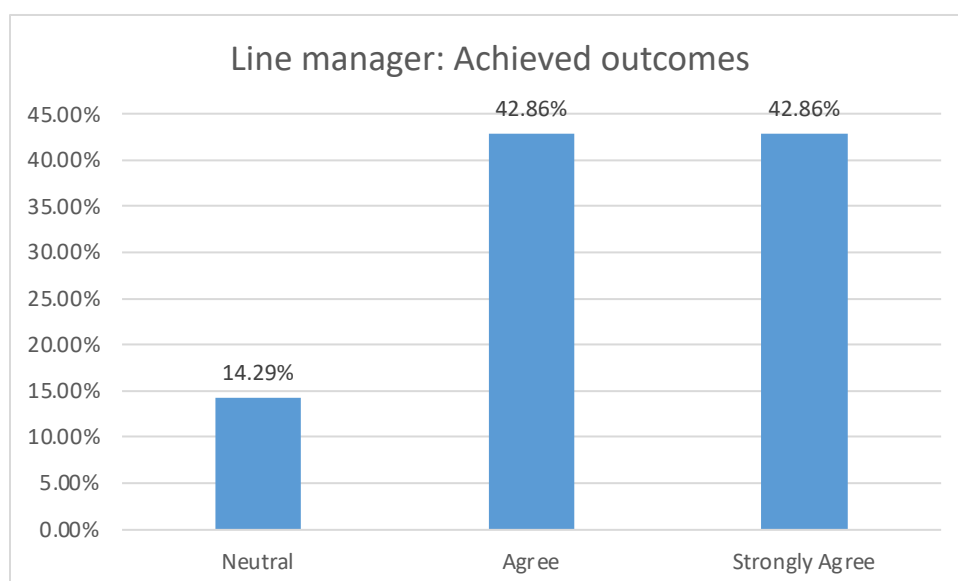


Figure 7

There is an overwhelmingly positive indication that coaching within the organisation achieved its intention, and both coachees and line managers agree, with only a small percentage not having derived value from the intervention.

Achieved Outcomes of Coaching (Question 6)

Coachee Responses

Comparing this to what the coachees derived or experienced after the coaching intervention, 48% were in the area of behavioural shifts or changes, 14% in better stress management, 10% in technical skills development, and 5% each for better business engagements, enhanced emotional intelligence and confidence, having a more strategic approach and poor performance improvement. Only 5% indicated that the coaching was not helpful in shifting behaviour (see table 3 below).

Table 3

Coachee: Coaching outcomes	Percentage
Behavioural shift;	47.62%
Better Business engagements;	4.76%
Better engagements with my leadership team;	4.76%
Better stress management;	14.29%
Enhanced emotional intelligence, networking, increased confidence;	4.76%
I do not think the coaching intervention shifted my behaviour;	4.76%
Poor performance improvement;	4.76%
Shift to have a more strategic approach to things rather than being operational. ;	4.76%
Technical skills development;	9.52%
Grand Total	100.00%

Line Manager Responses

Comparing this to what the line managers perceived as the shifts noticed, 50% were behavioural shifts or changes, 10% in better stress management, 10% in technical skills development, 10% indicated that there was a more positive outlook and 10% noticed greater self-confidence. A further 10% said it was too soon after the intervention to notice any differences (see table 4 below).

Table 4

Line Manager: Coaching outcomes	Percentage
Behavioural shift;	50.00%
Better stress management;	10.00%
More positive outlook - understood the bigger picture better and the impact it had on her;	10.00%
Self confidence ;	10.00%
Technical skills development;	10.00%
Too soon to say as coaching not started yet;	10.00%
Grand Total	100.00%

There is alignment between what coachees and line managers perceived as the outcomes of coaching, with this being mainly in the area of behavioural change. In comparing why coachees began coaching, only 6% indicated stress management as the reason, however it is interesting to note that 17% experienced better stress management after the coaching intervention.

Continue Coaching in the Future (Question 7)

Coachee Responses

85% strongly agreed that they would take up a future coaching intervention and 16% responded neutrally (see figure 8 below).

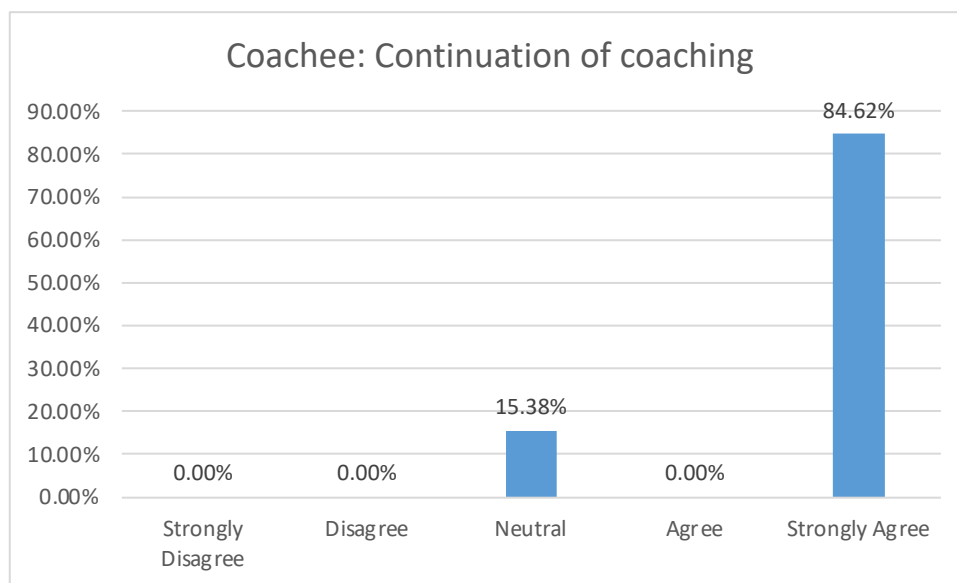


Figure 8

Line Manager Responses

71% strongly agreed that they would continue to recommend coaching for their team members and 29% agreed. No line managers disagreed (see figure 9 below).

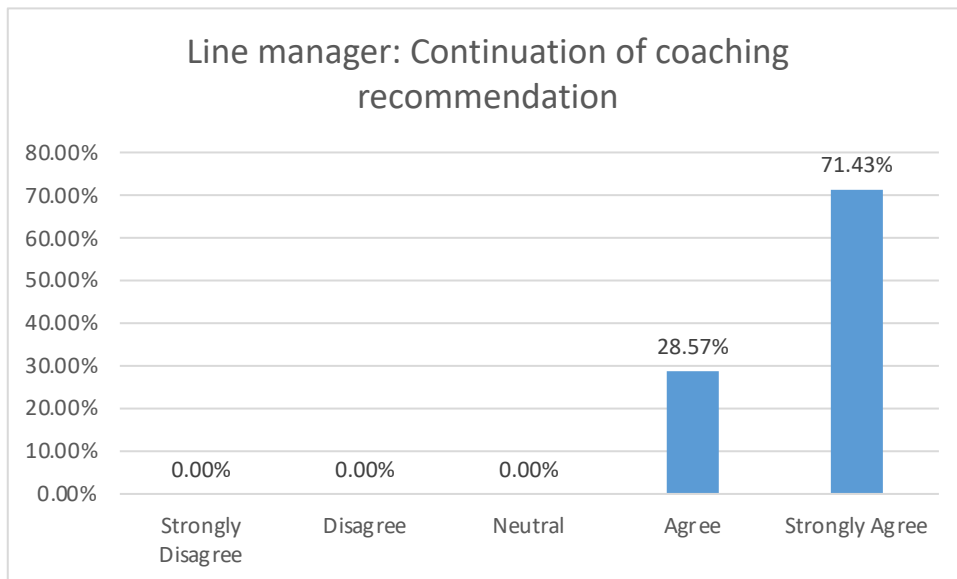


Figure 9

Coaching is perceived as a very valuable and successful initiative, as indicated in the data. There is affirmed by both the line manager and coachee responses.

Reasons for Continuing Coaching in the Future (Question 8)

In analysing the commentary from the open-ended questions where both coachees and line managers were asked to elaborate on their experiences, there were a set of themes that emerged that are outlined below.

Coachee Responses

- Improved self-awareness and enhanced perspective: Feedback indicated that coaching helped coachees recognize certain blind spots and the different perspective provided by the coach helped them to consider different viewpoints. This, in turn, helped coachees to better navigate the complicated dynamics of the corporate workplace.
- Career development: The implementation of coaching has been valuable in helping individuals with clarifying of their career goals, define the associated development plans to assist with achieving these goals, and enhancing their brand in the organisation. In addition, there was noted improvement in leadership skills and levels of confidence.
- Wellbeing: It was noted that coaching provided a safe space for individuals to be vulnerable, manage stress, and work on altering behavioural patterns at both work and within their personal lives. One of the participants indicated that the coach was like a combination of therapist and mentor, helping them shift perceptions and behaviour within both the work and home environments.

- Navigating the Corporate Workplace: Coaching was seen to assist with navigating workplace politics, which is not covered in formal managerial development programmes.
- Implementation of Coaching: While most respondents found coaching to be very beneficial, there was also a cautionary note that coaching could be misused by some managers who may deploy it for disciplinary measures rather than as a developmental tool.

As an insider researcher and an employee that has access to the annual engagement results of the organisation, the results indicate an area of improvement on the topic of psychological safety. As noted in the coachee responses, coaching provided a safe space to be vulnerable and share challenges openly with the coach. It is perhaps worth considering coaching as a tool that could potentially help the organisation to address this developmental area.

Line Manager Responses

- Wide Positive Impact: Coaching has a positive effect, not just on the coachee themselves, but on their teams, broader work groups and even external stakeholders.
- Facilitates Growth: Coaching was seen to help team members to adapt to new responsibilities and take on additional, more complex roles. It widens the coachee's perspective, helps with blind spots, and provides a space for the coachee to talk to someone independent who provides neutral feedback. It also creates a space for coachees to explore career growth opportunities and take accountability for their own development.
- Personal and Professional Development: Line manager respondents emphasised that coaching is essential for personal and professional development.
- Conditions for Successful Coaching Interventions: Coaching success is dependent on there being a good match between the coach and coachee, and when there is a well-structured process with clear goals leading to focused and relevant positive outcomes. Finally, the coaching process is seen to be most effective when the coachee is committed to doing the work, open to changing their mindset and behaviour and open to the growth opportunities.

Additional Commentary (Question 9)

In the final question of the survey, participants were asked if they had any further comments to add regarding the coaching experience. Below is a summary of the coachee and line manager comments.

Coachee Responses

- **Valuable and Recommended:** Most coachee respondents indicated that they would take up coaching again and highly recommend it for one's career development. One respondent noted that they should have done their coaching much sooner, demonstrating the value of starting the intervention early.
- **Benefit to All:** Coaching is seen as an essential developmental tool in the corporate workplace and there was a sentiment that "everyone deserves a coach" and not a benefit reserved only for senior management and executive level employees in the organisation.
- **Structured Process and Implementation:** There was a suggestion that coaching should be a self-selected option similar to how employees would choose other learning and development interventions. There should also be clear referral processes where required and great importance placed on using coaching appropriately. Managers should be trained on how and when to implement coaching as a developmental tool.
- **Employee Wellbeing:** There was clear indication that coaching provided the essential tools for success both professionally and personally, including stress management and overall wellbeing.

Line Manager Responses

- **Contextual Knowledge:** It was suggested that having a coach with financial services experience is highly beneficial because the coach understands the environment and challenges and can better guide the coachee in how to optimally navigate themselves in the specific context. This speaks to the benefit of internal coaches.
- **Sustainability of the Coaching Intervention:** In one response, the line manager indicated that while there were immediate positive changes after the intervention, some of the coachee's previous behaviours emerged six months into the journey.
- **Self-awareness and Behaviour Change:** Coaching helped employees gain insights into behaviours they were previously unaware of, and helps to work on building new, healthier behaviour patterns.
- **Clarity of Objectives and Goals:** Being clear on the objectives of the coaching intervention is critical. In addition, open dialogue between the line manager and the coachee on the desired outcomes is vital for success.

Thematic Analysis of Interviews

Coachee Responses

There was mixed feedback from the coachee interviews with two coachees indicating that the coaching intervention was highly valuable and one coachee having not enjoyed the

experience nor deriving any significant value from the process. Below are the key themes that emerged from these interviews:

- Importance of an empathetic line manager: It was expressed that having an understanding line manager, well in-tune with the developmental needs of the team member is necessary to successfully initiate the coaching intervention discussion. In addition, open communication with the line manager to identify and agree on challenges is essential, together with input from the line manager through the coaching journey. The coaching process was positioned as performance enhancement rather than it being a punitive measure; this encouraged the coachees to be more open to the intervention. A second coachee, who did not find the experience valuable, indicated that it was not their own personal realisation that coaching was required but rather recognised by their line manager after a departmental restructure – this led to the individual feeling exposed about their lack of confidence and comfort and thought it indicated an issue with their ability to perform in the new role. The coaching, therefore, felt more aligned with the expectation of the line manager rather than the individual.
- Value of the coaching intervention: Coaching helped with a shift in perspective and enhanced self-awareness and the coaching sessions provided a safe space to practice the newly acquired skills and to see benefits quickly. It also helped with building self-confidence and being more effective in the work.
- Self-motivation: Individuals must be open and willing to grow and develop for coaching interventions to be effective and coaching should be offered, rather than mandated, which can foster a sense of self-improvement and commitment to the process. Also highlighted was the need to set one's own goals and not to go along with those presented by the line manager if the individual is not in agreement.
- Coach-coachee matching: One of the reasons cited as to why the coachee did not enjoy the coachee experience was due to a lack of chemistry between them and the coach. In addition, the coachee did not enjoy the process of deep introspection and was subsequently resistant to the process.

Line Manager Responses

The feedback received from line managers in the interview process showed positive sentiment towards the value of workplace coaching for members of their team, particularly in supporting required behavioural changes to success in their job roles. There were certain conditions that they believed to be crucial in ensuring the success of the coaching intervention. These are as follows:

- Acknowledgement of, and agreement to, the suggested areas of development – two different examples of coaching were shared with one being highly successful and the

employee being promoted to the next workforce level in the organisation and the other employee whose coaching intervention was ultimately unsuccessful. The difference was attributed to the willingness to change and shift behaviour in comparison to the other employee who refused to recognize their developmental areas and eventually left the organisation.

- Importance of openness and willingness: Line managers highlighted the need for the individual to be open to the new coaching experience, having the willingness to make it work and applying what is learned through the coaching journey, as key factors to making a difference and ensuring a successful coaching experience.
- Clear articulation of challenges and goal setting: When coaching is being recommended by the line manager as a developmental intervention, it is crucial to ensure that there is prior engagement with the line manager by the coach to deeply understand the challenges being faced by the employee. Further to this, there must be clear discussion between the line manager and the employee on the reason for coaching with the intent being to empower the individual and ensure they buy into the coaching process. All relevant parties in the workplace coaching arrangement i.e. the line manager, the coach and the coachee must be well-aligned and in agreement on the objectives of the coaching for it to have any chance of success. A particularly valuable insight was one related to structure and rhythm of the coaching journey – it was suggested that the coaching process would have a rhythm of reflection, insight, action and continued application in order to maintain momentum and sustain the positive outcomes of the coaching process.
- Coach matching: Matching the coachee with the right coach and one with which the coachee is comfortable, is most important for coaching to work. One of the interviewees spoke about diversity in coaching and cited an example of putting together a similar race and gender of coach and coachee together, to which the coachee objected, preferring a very different profile of coach; one that would “put her under pressure” and one with whom she had “no cultural connection”, believing it would encourage her to step outside of her own perspectives.
- Sustainability of Coaching Impact: One of the line managers mentioned a successful coaching intervention for her team member who she then plans on reminding of her new behaviours and encouraged team members to do the same, so the coachee would not revert to earlier unhelpful behaviour patterns. The line manager did indicate, however, that there should be clear research and guidelines on how to ensure the continued success of coaching interventions.

Factors Impacting the Effectiveness of Coaching in the Organisation

Despite the data showing that coaching is providing very positive effects in the organisation, it would be helpful to summarise the conditions and reasons that were cited from respondents that led to effective coaching or inhibited it.

- At the very outset of the coaching process, it was indicated that the line manager had to ensure that the coachee is open to participate in the coaching, they agree on development areas identified, they set their own goals and are willing to do the often difficult work that could lead to the positive outcomes.
- The coachee should match well with the coach and the line manager should not choose the coach; it should be the choice of the coachee. If there is no “chemistry”, the coaching process has the potential to fail.
- Coaching should be conducted through a structured process with sufficient time (number of sessions) for the coachee to feel that there have been material shifts.
- Ensuring sustainability of the positive effects are not easy when it comes to behaviour change. One of the ways this could be addressed is by the coachee being held accountable and gently reminded by the line manager and team members if the individual reverts to previous behaviours.
- It is most important that coaching not be used as a threatening tool in the workplace but rather in helping coachees achieve specific goals and to provide guidance and support to individuals in the workplace.

Conclusion

The objective of the study was to investigate the alignment between the reasons for coaching being recommended in the workplace and the achieved outcomes. As an accredited coach who understands the importance of coachees setting their clearly defined goals and being open and willing to shift, the researcher questioned the validity of the workplace coaching process of the organisation. This process involved line managers recommending coaching for employees within their team and often meeting with the coach before the coachee did, to discuss the challenges being experienced and what they believed needed to shift in the coachee's behaviour.

The hypothesis of the researcher was, therefore, that most coachees in the organisation would not have derived value from the coaching interventions as the conditions and goals were not set by them. In addition, as an insider researcher employed by the organisation, it was known that the coaching practices throughout the organisation were not guided by a clear framework. This implied that, despite the significant monetary investment in coaching, there was no overall

organisational understanding of the reasons coaching was being undertaken and if it was being suggested as an appropriate mechanism to address the challenge at hand. In addition, there was no knowledge of the value of the coaching interventions and if it was providing a worthy return on investment.

The aim of the study, therefore, was to understand if the current context of the line manager recommendation of coaching was proving to be successful, and if the coachee and the organisation was deriving value from the coaching interventions being undertaken.

The overall results of the research found that there was clear alignment between coaching intention and achieved outcomes. In addition, there appeared to be no challenges when line managers recommended coaching. The data showed that coachees derived great benefits from the coaching and found the interventions to be both professionally and personally enriching. In the small percentage of coachees who did not derive benefit, the reasons for this informed the necessary conditions required for coaching to be successful. In this instance, the coachee did not set their own goals so did not buy into the process. The coachee also indicated a lack of chemistry with the coach and believed that a different coach may have led to a better coaching outcome. These reasons were echoed in the themes that emerged from the qualitative data when both coachees and line managers highlighted the conditions necessary for coaching to be successful. This included being willing and open to the shifts required, agreeing on goals for the intervention with the line manager, and working with a coach that suited to the coachee, not someone who was the line manager's choice. This illustrated to the researcher that the current arrangement within the organisation is successful, provided certain key conditions are in place.

Recommendations

In conducting the research, a few interesting topics emerged that could be research worthy in the future. The first would be to conduct a study directly matching the line manager feedback with the coachee within the team to assess if there is specific alignment between the two parties. This study provided a generalised comparison between managers and coachees but it would be valuable to understand if the results are similar when there is a direct comparison. The second study would be to track the return on investment against the career advancement of coaching for non-managerial staff. It was found within this study that coaching is heavily weighted towards managerial staff but there could be a missed opportunity by not investing in coaching as a developmental intervention for up-and-coming employees. Lastly, there should be research conducted on why coaching is being undertaken predominantly by females in the

workplace. The hypothesis could be that it seeks to develop women, historically disadvantaged in the workplace, to prepare them for more senior roles in the organisation. There could, however, be a more sinister reason that the assumption is that women are best suited for development in the so-called softer skills in comparison to men who are often developed in the technical skills.

Personal and Professional Learning

Conducting research within the organisation initially felt quite challenging – there were defined processes to be followed when conducting research due to survey fatigue within the organisation, participant data could not be directly accessed due to privacy rules, and obtaining a meaningful participant sample could not be fully controlled. This was, however, offset by very meaningful discussions with the interviewees who were most willing to share about their experiences. Line managers, in particular, engaged in the discussion passionately and were very eager to convey the positive effects of coaching that had been realised for their teams. This altered the researcher's perception of conducting the study which led to an overall enjoyable and valuable research experience.

The researcher acknowledges many learnings that have emerged from conducting this research in both the personal and professional areas of her life. On the personal side, there is a sense of accomplishment on completing a project of this complexity. Being a qualified coach has also enhanced her knowledge of the workplace coaching environment and will inform how her coaching approach is adjusted based on the learnings from the study. On the professional front, the researcher learned how to design and conduct a work-based research project at her place of employment with consideration of, and adherence to, all ethical issues relevant to this project. The learnings from the study will be shared with the Coaching practice in the organisation, and the results will be used to inform the development of clear guidelines on how coaching is implemented throughout the company.

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