

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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Consideration for Ethics and Insider Research

Ethical Considerations

- Ethical approval obtained (University of Wales Trinity Saint David)
- Compliance with POPI Act (2013, South Africa) for data privacy
- Anonymised survey distribution via organisational administrator
- Organisational requirements: No direct linking of responses, NDA signed, and permission from Group Head of Learning

Insider Research Considerations

- Benefit:
 - Insight into the norms of the organisation
 - Relationships with colleagues – enhanced trust and data quality through accurate interpretation
 - Comfort with an internal person conducting research
- Drawbacks:
 - Awareness of potential bias
 - Mitigation strategies to address this

Background

Reason for the Research

- Coaching enhances performance, empowerment, and staff retention (Theeboom et al., 2014; Tompkins, 2018)
- Coaching has been in place at the researcher's organisation for years
- Lack of data on why coaching is proposed, ROI evaluation, and effectiveness assessment
- Impact of line manager recommending coaching for the coachee

Research Aims

- Identify reasons for recommending coaching interventions
- Compare workplace coaching theory with organizational practices
- Assess the impact & value of coaching based on manager & employee feedback

Expected Learning Outcomes

- Conduct ethical, work-based research within the organization
- Analyze & critically evaluate coaching data
- Provide actionable recommendations for future coaching strategies
- Reflect on the research process as an insider researcher

Intended Research Impact

- Understand coaching implementation & alignment with intended outcomes
- Develop a standardized coaching framework & toolkit
- Contribute to broader workplace coaching guidelines for other organisations

Literature Review

Key Themes Explored:

- Intended value of coaching in the workplace
- Effectiveness of workplace coaching
- Coaching in the financial services industry (global, Africa, South Africa)

Definitions of Coaching

- One-to-one, goal-focused intervention for professional development (Bozer & Jones, 2018)
- Executive coaching targets senior leaders for organisational benefits and leadership skills (Passmore & Lai, 2019)

Intended Value of Coaching:

- Initially aimed at performance improvement, now used for employee support and organisational change (Grant, 2017)
- Enhances skills, aligns expertise with company goals, and boosts well-being (Frederik et al., 2024)
- COVID-19 shifted focus to mental health and holistic employee well-being (Weinberg & Scandura, 2024)

Impact and Outcomes of Coaching:

- Individual Level: Improves skills, confidence, and motivation (Tompkins, 2018)
- Organisational Level: Enhances retention, culture, and innovation (Jones et al., 2018)
- Executive coaching strengthens leadership and emotional regulation (Nicolau et al., 2023)

Coaching in Financial Services:

- Limited research in the sector, but positive impacts on motivation and performance (Achi & Sleilati, 2016)
- Studies in Africa show performance improvement but no clear link to commitment (Chidiebere & Tunde, 2024)
- No research on coaching effectiveness in South African financial services—identified research gap

Conclusion:

- Coaching is effective for performance, confidence, leadership, and well-being
- A lack of research on whether coaching outcomes align with intended goals, especially in financial services
- Need for further studies on coaching effectiveness in South Africa's financial sector

Research Methods & Approach

Research Paradigm

- Ontology: Constructivism – reality is subjective, shaped by individual experiences & social factors
- Epistemology: Interpretivism – knowledge is derived through understanding & interpreting social realities

Research Method

- Mixed-methods approach: Combines quantitative (trends, patterns) and qualitative (in-depth insights) for a holistic understanding
- Mixed-methods approach:
 - Quantitative: Surveys for structured data & comparison between line managers and coachees
 - Qualitative: Unstructured interviews for deeper insights into coaching experiences

Participants

- Random selection of employees who underwent coaching in the past year
- Line managers of these employees invited for comparative responses
- Voluntary participation with anonymised responses

Data Collection

- **Quantitative:** Surveys for quick, standardized data collection
- **Qualitative:** One-on-one unstructured interviews for deeper insights
- Ensured confidentiality & voluntary participation

Data Analysis

- **Quantitative:** Descriptive statistics to compare coaching intent vs. outcomes
- **Qualitative:** Thematic analysis to extract key themes from coaching experiences

Findings

- Clear thematic alignment between the reasons for initiating coaching in the organisation and the reported outcomes
- 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
- Data shows that the dominant reason for coaching being initiated and undertaken is to assist with behavioural change
 - Reason cited most often by both line managers and coachees as to why coaching is initiated and what is achieved
- 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%)
- No challenges when line managers recommended coaching
- Conditions necessary for effective coaching

Conclusions and Recommendations

- Study directly matching the line manager feedback with the coachee within the team to assess if there is specific alignment between the two parties.
- 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.
- Research conducted on why coaching is being undertaken predominantly by females in the workplace.

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