

Evaluating Coaching

As the coaching community continues to grow and coaching as a developmental tool is increasingly prominent, the pressure to show that coaching works and adds value is likely to intensify. Coaching evaluation is an activity that almost all companies agree is important. The reality is there are few good instances of evaluation and this seems similar for mentoring too. It seems important that for coaching and mentoring to sustain and grow credibility evaluation needs to increase.

Why evaluate coaching?

The rationale for an organisation's need for evaluation is straightforward. There is a monetary investment (an explicit cost or an opportunity cost of Coachee's/Coach's time) which needs to be justified. The value of coaching must be clear to those paying the bill – Peltier (2001)

But what must not be overlooked are the benefits to the Coach and Coachee of evaluation? De Haan and Berger (2004) explore benefits of evaluation to both the Coachee and the Coach in terms of what *both* have learnt from the coaching assignment:

How did the Coachee look back on the process and outcome of the coaching? What became of the original objectives? What new objectives/plans does the coachee have? How does the Coachee intend to continue their journey of professional development?

How has the Coach contributed to the Coachee's learning process? What evidence is there for this? How did the Coachee experience the interaction during the coaching conversations? What were the "tricky" moments in the coaching, and how did the Coach handle them? What tips does the Coachee have for the Coach in her or his continued development?

How to evaluate?

Emerging recommendations seem to include:

- Adapting a traditional model of training evaluation, such as, Kirkpatrick's (1996) levels of evaluation; reaction to coaching, learning, behavioural and organisational outcomes.
- Clarifying why the evaluation is being conducted and call a clear purpose of what you are trying to prove; business impact, learning and growth or improved behaviours.
- Making sure in advance that coaches are willing to use evaluation tools (contracting).
- Minimise resistance to evaluation by letting coachees know before coaching starts (contracting) what evaluation measures will be used and how they will be expected to contribute.

Business results

If bottom line results are what you want, focusing on one key business indicator can be useful in gaining straightforward results. Here the advice seems to be plan in advance of your coaching programme so a firm baseline of data can be realistically collected. Return on Investment is one way being experimented with although it can be complicated, resource demanding and statistically challenging. However, measuring 'reasonable evidence' can be very useful without over engineering multiple and/or complex measures.

One good instance of coaching evaluation which used a systematic approach was cited in research by McGovern et al (2001) where they found a blend of Kirkpatrick model alongside Phillip's (1997) Return on Investment model. In addition, they developed a methodology for assessing the factors contributing to effectiveness and ineffectiveness and found that the key factor that attributed to the effectiveness of coaching was the quality of the relationship between the coach and the coachee. During telephone interviews with researchers in the study, coachees were helped to identify the tangible business benefits that resulted from the coaching, and to calculate the monetary value and their level of confidence in that estimate. They were also asked to give a percentage of the benefit that they attributed to the coaching and their confidence in that percentage.

For example:

One senior manager working on interpersonal skills within the context of project noted that she improved the relationships within her project team and enhanced performance.

She estimated the monetary value resulting from her coaching was US \$215,000 and was 90% confident in this estimate.

She attributed 50% of the improvements in her work outcomes to the coaching and was 100% confident in this estimate.

Adjusted benefit = US \$215,000 x 50% x 100% x 90% = US \$96,750

The cost of the coaching programme was US \$15,000

Using Return on Investment (%) =
$$\frac{\text{Adjusted benefit} - \text{Cost of coaching}}{\text{Cost of coaching}} \times 100$$

ROI =
$$\frac{\$96,750 - \$15,000}{\$15,000} \times 100 = 545\%$$

The researchers believed that this manager's company returned 5.45 times its investment in the coaching that one individual received.

It is fair and only honest to say that some people struggle to accept the reliability of such coaching ROI's because of the subjective data that is fed into them. For many though the degree of measurement capability required is impressive and it raises the credibility of coaching. In many ways it is up to the host companies themselves to consider the pros and cons of ROI. But as Coaches themselves there is an important role to be aware of and contracting in such data collection at the start and ending of coaching assignments is a

valuable exercise for the benefit of the Coachee (eg “You said you want x by the end of our coaching assignment, so let’s measure where you are now and again when we finish to see how effective this coaching has been”).

Behavioural change

Here it seems data collection methods are needed when it comes to measuring perceptions of behavioural change. This could be done through face to face, telephone interviews, self or 360 degree assessments.

One simple way of doing this with the can be by contracting at the start of the coaching assignment with the coachee to identify a number of stakeholders for you to interview soon after the coaching has ended. These stakeholders can provide reasonable of evidence of enacted difference shown by the coachee. Of interest is Mackie’s (2015) research of multi-source feedback for the evaluation of “strengths” based leadership coaching. He concluded that there was a significant difference between the self-rating scores of Coachees and their senior stakeholders and concluded that both are required to best moderate the results of the effectiveness.

Surveys

These are often simple and non-resource intensive methods to collect reactions to coaching. The evidence suggests keeping these short and simple to be used by one or a combination of the coachee, their line manager, peers or colleagues. Here this can include agreeing and identifying a number of stakeholders to question as to the effectiveness of coaching. Here care needs to be taken to ensure the surveyed population is large enough to hold credibility.

Control groups

Comparing the results among coached with ‘non-coached individuals can be a very effective approach. Being able to compare before coaching with after coaching results can also be seen as more credible than examining post coaching data alone.

Evaluation frameworks

The Institute of Employment in the UK (IES) produced a provisional framework which was tested between 2003 – 2006 on in depth evaluation several coaching programmes. A subsequent framework was refined which recommends three main areas of evidence and a number of key helpful sources of evidence.

The **three key questions** identified most relevant to understand before coaching begins:

1. What does the coachee expect to gain from the coaching? And will they know at the end if these benefits have been realised?
2. What does the organisation expect to gain from the coaching? And how will it know at the end if these benefits are realised?
3. What processes (internal/external) does the coach and coachee need to put in place to enable the coaching programme to deliver the changes expected? And how will the coach and coachee know if they are working in time to change them if they are not working?

The **four main sources** most helpful to consider are:

- **Documents**, eg coaching contracts formed between coachee and coach. This could also include a triangular contract including input from a line manager or sponsor.
- **Coachee**, records or achievement
- **Coach**, (whether external or internal) providing their feedback
- **Organisation's** perspective, eg line managers, sponsors, staff or other connected stakeholders

Examples areas suitable for measurement

Organisational level – business/performance based

- ROI
- Sales/turnover
- Market share/new customers
- Productivity
- Cost benefit
- New products/services
- Citations
- Product/service quality
- Task time/development time/production time

People based

- Staff sickness/absence
- Customer satisfaction/complaints
- Employee satisfaction
- Climate
- Satisfaction amongst stakeholders
- Retention
- Integration into a new role
- On boarding for external hire
- Motivation/Confidence/commitment

Individual level

- 360 degree feedback ratings
- Achievement of coaching objectives
- Comparisons pre and post coaching
- Skill level/knowledge level
- Review/appraisal
- Manager assessment/self-assessment
- Job performance
- Output from psychometric/personality tests (building on strengths and/or addressing role/career specific development areas)

Process

- Coachee satisfaction of coaching
- Performance and quality of coach
- Stories
- Testimonies

Sources:

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4. Dr John McGurk, Real-world coaching evaluation, CIPD, 2010
5. Coaching: the evidence base, Research report, 2012
6. Doug MacKie, Who sees change after Leadership Coaching? An analysis impact by rater level and self – other alignment on multi-source feedback. International Coaching Psychology Review, Volume 10 No. 2 September 2015