Measuring the Effectiveness of Coaching

The purpose of this material is to assist you as an internal coach in creating a measurement strategy for assessing the effectiveness of the internal coaching process. The investment of time and resources that is made in the coaching process — both by the individual client and the larger organization — is significant. How can we determine with confidence that the outcomes and long-term benefit derived from the coaching process are worthwhile for the client and/or the organization? There are many possible strategies and tools that internal coaches can use to measure effectiveness. Making the right choice depends on factors such as the underlying purpose of measurement, available time and resources, and the overall objectives of the client and organization. This lab focuses on these issues.

The following sections review:

- Overview of Measurement Strategy including:
  - Measurement goals (the WHAT)
  - Measurement tools and strategies (the HOW)
  - Employing a co-active approach to measurement
- Levels of Evaluation Applied to Internal Coaching
- Measurement Strategies Matrix: Advantages and disadvantages of strategies
- Measurement Strategy Worksheet: Planning Tool

Overview of Measurement Strategy

Measurement Goals

Establishing clear goals for measurement informs WHAT you are going to measure. Before embarking on any measurement process, it is important to clearly answer these questions:

- Who are the stakeholders that are concerned about the effectiveness of the coaching process?
- What are the specific questions that measurement should address?
- How will the results of measurement be used?

Potential stakeholders of the measurement process may include: the coach, the client, the client's manager, the larger organization, or any combination of these.

Measurement can address a range of questions. A simple framework for measuring the effectiveness of any type of learning or skill development in organizations is well established in the professional training and development field, referred to as "levels of evaluation." *Appendix A: Levels of Evaluation Applied to Internal Coaching* summarizes the four levels of evaluation as described by Donald Kirkpatrick (see Kirkpatrick, 2006) applied to the internal coaching context.

Measurement Strategies and Tools

Understanding the GOALS of evaluation is important to determine WHAT to measure. Factors such as available resources (time, financial or technical), urgency, and the need for scientific credibility and rigor determine HOW to go about measuring coaching effectiveness. Measurement strategies and their corresponding tools can range from simple, quick and cheap to highly sophisticated, detailed, and expensive. *Appendix A: Measurement Strategies* provides an overview of possible strategies and/or methods for consideration when determining a realistic approach to measurement.

The approach to measurement is varied depending on what is needed by coach, client or organization. Measurement can be simple or complex, focused on improving the performance of an individual or changing the climate of an organization. The job of the coach is to identify what is needed, why it's needed, and who needs to be involved to make it happen.

The Measurement & Closure Section of the coaching tool kit, distributed at the beginning of the Internal coach program, offers several paper based measurement resources for your consideration. *Appendix A: Toolkit Resources for Measurement Phase* summarizes a description of measurement resources found in the Toolkit.

Co-Active Approach to Measurement

There are several ways in which we can apply a "Co-Active" approach to measuring coaching process. At the heart of the Co-Active Coaching process is the concept of the intentionally designed alliance between the coach and client, and the perspective that both the coach and client invest the coaching relationship with power. We believe that the strength of this relationship is a key criteria for successful coaching to occur. It follows, then, that a principal goal of the coaching process may measure the degree to which the coaching relationship is powerful. This perspective prompts quests such as:

- How clearly and powerfully designed is the coaching relationship?
- Are expectations clear?
- Are assumptions made explicit?
- What is the degree of mutual trust?
- How much freedom exists for exploration, risk-taking, or failure?
- When difficulties arise, are they quickly acknowledged and discussed?

In addition, a distinctly Co-Active Coaching relationship is characterized by the cornerstones and principles of the model. We believe that the most powerful coaching occurs when elements of the model are present in the coaching relationship. Measurement strategies that evaluate presence of the model would ask questions related to specific aspects of the model (for example, the degree to which the coach is able to "dance in the moment," or coach from a stance of curiosity).

Reference:
Kirkpatrick, Donald. *Evaluating Training Programs: The Four Levels* (3rd Edition). Berrett-Koehler Publishers, Inc. San Francisco. 2006

Levels of Evaluation Applied to Internal Coaching

Evaluation Level	**Description and Value**	**Questions Addressed**
One: ***REACTION***	Measures the client's REACTION to the coaching process. • Informs ongoing "designing the alliance" conversation. • Provides data on level of client satisfaction. • Stimulates reflection on learning.	• How satisfied is the client with the coaching process and/or coach? (Seems that there are two distinct questions here.) • What does the client like or dislike about coaching? • What changes would the client like to make? • How does the client plan to apply outcomes from coaching in life or work? • How does the client think that coaching outcomes can impact the organization? ***Two:***
LEARNING	Measures LEARNING — change in skills or knowledge. • Corresponds to development objectives identified by the client as areas of focus for coaching. • May focus coaching on specific skill or knowledge areas client wants to improve through personal development initiatives. • Informs other resources or experience that may be needed.	• To what extent are new skills or knowledge being demonstrated? • What new awareness or insight has emerged from the coaching process? • To what extent has coaching had an impact on the client's level of capability?
Three: ***APPLICATION***	Measures APPLICATION of new skills or knowledge in specific job tasks. • Shifts focus from the individual to the job and work setting. • Begins to provide data on difference that is being made to the organization.	• How have new skills or ways of interacting been used in real work situations? • To what extent has behavior change occurred on the job as a result of coaching?
Four: ***IMPACT***	Measures IMPACT on the organization and organization's results. • Measures criteria that are of highest importance to the organization. • May inform evaluation of the return-on-investment or cost/benefit comparison of coaching.	• What difference has the coaching process made in actual organizational results (e.g. sales, errors, retention, morale, creativity, time-to-market etc.)? • What is the return-on-investment realized through coaching for the organization?

Measurement Strategies Matrix

Strategy	Description and Value	Advantages	Disadvantages
Informal Conversations	Using conversations to informally check on the coaching process. • Happens in the moment — real time. • Creates opportunity for ongoing "designing the alliance" conversation. • Provides real time opportunity to calibrate coach approach.	• Requires few resources and little time. • Easy, quick and simple to administer. • Allows coach to calibrate coach approach. • Grants the relationship power by affirming equal responsibility for "designing the alliance".	• Real time response - minimal time for reflection or introspection. • Cannot gather consistent data over time and across multiple clients. • May lack credibility beyond the coach/client relationship.
Interviews	Interviews are one-on-one meetings where the interviewer asks specific questions related to the impact of coaching and records interviewee responses. • Collects information from a variety of sources. • Provides detailed narrative accounts of how the coaching process is impacting an environment. • Gives interviewer the opportunity to clarify responses minimizing potential for lingering questions and misunderstandings.	• Process can be formal or informal depending on the purpose and approach of the interview. • Cost can vary according to the formality of the intended interviews, e.g. conducted by the internal coach, an associate within the organization, or using an external resource. • Real time Interviews allow interviewer to explore responses (e.g. , be curious about responses or use intuition to deepen the inquiry process.)	• Time consuming for interviewer and interviewee(s). • Responses based on opinions or feelings rather than facts or evidence. • Interviewee(s) may assume they will be influential in changing the approach of the coaching process. • Costly if external resources used for interview process.
Written Surveys or Questionnaires	Standard set of written or electronic questions or statements that provide information for the purposes of assessing the impact of coaching. • Provides a consistent approach to obtaining information from a variety of sources.	• All participants respond to the same questions. • Easy to assimilate responses as a result of the standard approach. • Easily distributed to a large number of participants. • Flexible in design and approach depending on available resources. • Useful to gather quantitative data.	• Costly if external resources are used. • Time requirements to complete survey/questionnaire. • Assimilating scientific, credible data may require external assistance. • More details involved in assessing results.
Observation	Observation is to attentively watch and record behaviors for the specific purposes of providing clear and specific feedback to the client. • Provides focused feedback on specific competencies and/or areas that will serve performance development.	• Provides real time examples of what is working and what is not. • Creates focal point(s) for coaching. • Provides avenue for noticing impact on organizational environment.	• Observations may be subjective in nature based on observer's interpretation of what is happening. • Time consuming for observer. • Presence of observer may be intrusive, inhibiting others from speaking and responding freely.
Extant Data Analysis	Extant Data Analysis involves the use of existing organizational data such as: • Sales records • Employee retention trends • Customer complaint logs • Employee satisfaction surveys	• Links coaching to concrete organizational metrics. • Data already exists so does not need to be created, just gathered. • May be useful for level 3 and 4 evaluation.	• May be difficult to establish relationship between coaching and the data. • Data may be difficult to access or gather.