

# The business case for coaching – evaluating impact

## A document by Blue Edge Consulting Ltd

### The need for evaluation

In a world equally conscious of both budget and quality, we as coaching providers and our clients are more and more frequently being asked to present the business case for coaching programmes.



At Blue Edge, our coaching practice includes experts in assessment, measurement and evaluation. Our consultants run coaching evaluation workshops for professional bodies like the British Psychological Society (BPS) and the CIPD. Our experts have designed evaluation programmes to suit the differing needs of our clients, from return on investment studies through to more qualitative feedback and reporting.

Our evaluation approach is based on five key principles, 'The Five Es of Evaluation':

- Establish the purpose of evaluation
- Enlist the support of all those involved
- Ensure measures are credible for your audience
- Evaluate at the appropriate level
- Early start results in greater rigour.

### Evaluation in partnership

Our experience has found that coaching evaluation is best done with the provider and client working in partnership to develop a credible and meaningful evaluation report. This requires close consultation to develop an evaluation plan which takes into account the needs of different stakeholders, as illustrated below:

Stakeholders	Stakeholder data requirements	Current measures	Required measures
Coachee	Demonstrate learning has taken place	Self report	Team, client and line manager reports
Coachee's line manager	Improved performance	Appraisal data, performance management	Business impact
Sponsor/buyer	Return on expectation	Anecdotal feedback	Achieving objectives
Finance Director	Return on investment.	Coaching spend.	Coaching benefits in monetary terms, coaching spend: ROI

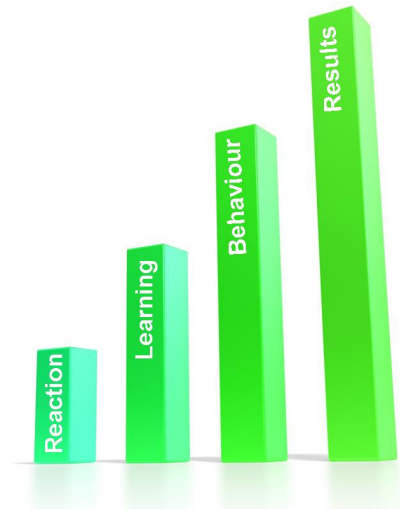
Example of stakeholders' evaluation needs



## Levels of evaluations

Stakeholder research informs the levels at which organisations need to measure the impact of their coaching. At Blue Edge we have adopted Kirkpatrick's model of evaluation (*below*) and Jack Phillips' (RoI Institute) work to inform our methodology which means that we can measure the impact of coaching at any level.

- **Level 1: Reaction:** To what degree participants react favourably to coaching
- **Level 2: Learning:** To what degree participants acquire intended knowledge, skills, and attitudes based on coaching
- **Level 3: Behaviour:** To what degree participants apply what they learned during coaching on the job
- **Level 4: Results:** To what degree targeted outcomes occur, as a result of coaching and subsequent reinforcement.



Jack Phillips adds a fifth level, **Return on Investment**, which provides data on the financial impact of coaching.

Our strong scientific and research base allows us to identify the most reliable and valid methods of data collection and analysis. Examples of tools that we have used are illustrated below:

Methods	Evaluation Levels			
	Level 1: Reaction	Level 2: Learning	Level 3: Behaviour	Level 4: Results
Interviews/questionnaires	•	•	•	•
Reflective journals	•	•	•	
Appraisal data			•	•
Coach feedback			•	
Employee attitude surveys			•	
360 feedback			•	
Key business HR metrics				•
Key business and performance metrics				•

## Auditing the coaching process to maximise efficiency and quality

Blue Edge has dedicated project managers for coaching projects who are responsible for managing and auditing the coaching process. Project data is also regularly reviewed by our internal management team during monthly meetings.

Our project manager's responsibilities include:

- Maintaining open and proactive communications with the client
- Handling initial coaching request
- Co-ordinating coach and coachee matching, ensuring the process is carried out efficiently
- Maintaining accurate records of: the number of coaching sessions contracted/ delivered and questionnaire evaluation documents completed/pending
- Providing monthly reports to the client on the status and progress of coaching
- Managing coach selection and contracting.

