



Reflecting pathways to  
learning and change



#### **F. Campone, Inc. Newsletter**

*Currents in Coaching Research*  
*Bridging Coaching-Related Research and Practice*  
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This is one of a series of articles which seek to bridge coaching-related research and coaching practice. Each article focuses on a specific coaching-related question and provides a summary of two or three publications from peer-reviewed journals, coaching-related professional associations or professional texts. I'll offer some observations for readers with a researcher lens and observations for readers with a practitioner's eye. Readers are invited to contact me with recommendations for topics or articles to review. Feedback is very welcome ([francine@reinventinglife.net](mailto:francine@reinventinglife.net)).

## **Currents in Coaching Research: Assessing Executive Coaching ROI**

### *The Literature in a Nutshell*

Mel Leedham (2005) developed his model, The Coaching Scorecard, in an effort to provide a holistic framework and benefits model for assessing the return on investment (ROI) for organizations purchasing executive coaching. His pyramid model is derived from three sources: an analysis of the literature on ROI; the results of a survey of over 200 executives who had experienced coaching; and a case study of individuals who purchased executive coaching for their organizations. The foundational base of Leedham's model consists of four factors in effective coaching relationships: the coach's skills, the coach's personal attributes; a structured, disciplined and challenging coaching process; and a safe supportive coaching environment. At the next level, Leedham identifies inner personal benefits which clients derive from coaching such as clarity and focus, confidence and motivation. The third tier of his model identifies the ways in which client inner benefits translate into workplace performance and behaviors. The pinnacle consists of the business results which were identified by the organizational client as important or valuable. In Leedham's model, business results are behavioral, such as improved productivity, enhanced career progression and improved performance.

The model put forward in *Coaching that Counts* (Anderson & Anderson, 2005) encompasses many of the same elements as Leedham's model. The Andersons' book presents what the authors suggest should be included in an effective and strategic coaching program. The final chapters provide a highly detailed discussion of the five levels of the Andersons' strategic coaching evaluation. Their level one addresses assessing the reaction of the clients to initial coaching sessions and level two assesses what clients have learned in coaching. These are measured through the use of a client self-assessment questionnaire. Level three looks at how the client has applied the learning in the workplace. Level four examines success stories of applied learning and evaluates the impact of the

changed behaviors on the workplace. Level five applies a monetary value to the changes and uses a detailed worksheet to calculate the return on investment using a formula:  $ROI = ((\text{benefits} - \text{cost}) / \text{cost} \times 100)$ .

Somewhat tangential to ROI models but nonetheless useful for our consideration is Richard Kilburg's (2004) exploration of the value of case studies. Kilburg proposes case studies as a "narrative way of knowing and creating meaning". His proposition- that the fact of coaching intervention itself may be more easily shown to have impact than the specific conceptual framework of a coaching intervention- implies that numbers alone cannot tell the whole story in a way that's useful. He suggests that while consultants are waiting for the "results of the correlations, analyses of variance... designed to test the efficacy of various forms of coaching... we curl up in front of the fire with some good stories of how our colleagues are entering into the worlds of their clients and trying to help them make sense and meaning..." (p. 210).

### *The Researcher Lens*

Overall, the studies affirm the value of using mixed methods and approaches in a holistic assessment of return on investment. ROI assessments are both formative and summative. Such evaluations should include baseline data on client knowledge and skills and, where appropriate, relevant organizational processes in which the client may play a role. It's useful as well to thoroughly document if not quantify the monetary effects of client changes. Leedham does not provide a mathematical formula for business results; however the Andersons' formula is consistent with such formulae found elsewhere.

Numbers alone, however, cannot demonstrate the links between coaching and business results. Qualitative data gathered through interviews, coaching logs, self-assessment ratings or, as Kilburg suggests, in the form of case studies, can more effectively connect the dots between the individual client's coaching experience and the return on the organization's investment.

### *The Coaching Lens*

The articles point out the value of coaches understanding the client's business context and of simultaneously holding both the individual client's coaching goals and the organization's business goals. Leedham identified four areas where he suggests that individual client improvements strongly correlate with achieving business goals: confidence, work-related techniques and skills, work relationships and clarity of purpose. All of these assessment models underscore the importance of having clear coaching objectives and establishing an effective coaching relationship at the outset. All also reinforce the importance of documenting the process throughout. Whether the ROI incorporates a monetary value or otherwise, a well-documented case study serves to reinforce client learning and is a base for coach learning and self-correction.

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#### *Works Cited*

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