

## Evaluating the effectiveness of executive coaching: beyond ROI?

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The popularity of executive coaching has increased dramatically in both the practitioner world and academia during the past decade. However, evaluating the effectiveness of coaching has lagged behind. Executive coaching is a multi-disciplinary practice, and professionals from many different scholarly backgrounds provide coaching services. The paucity of empirical research may be attributed to the lack of a consensus among these divergent professionals regarding whether and how to evaluate the effectiveness of coaching. In this article, we conducted a meta-analysis of the empirical research as well as reviewed the retrospective studies evaluating coaching effectiveness. Subsequently, we discussed six areas that impact the way researchers evaluate coaching effectiveness and the conclusions they may draw from their studies. Although the Return On Investment (ROI) index provides a straightforward, overall measure of effectiveness, its veracity and usefulness is questioned. It is hoped that the clarification of these areas will help guide the future of coaching evaluation research and practice.

**Keywords:** coaching; research; measurement; ROI; evaluation; effectiveness; methodology

### Introduction

The use of executive coaching has increased markedly during recent years and now is regarded as a major leadership development practice in corporate organizations around the world (Corporate Leadership Council, 2003). It has been estimated that more than 70% of organizations with formal leadership development initiatives employ coaching as an important part of that mix (Zenger & Stinnett, 2006). The growing popularity of executive coaching also can be witnessed in the academic literature. Grant and Cavanagh (2004) conducted a bibliographical review of coaching studies and found a sharp increase in peer-reviewed journal publications during recent years. Similarly, English (2006) investigated the executive coaching literature, finding an increase of 300% in published articles in scholarly journals from 1994–1999 to 2000–2004.

While executive coaching is gaining popularity, the professional application of coaching, our understanding of when to use coaching, and the evaluation of its effectiveness has lagged far behind. A recent *Harvard Business Review Research Report* asserted: ‘The coaching field is filled with contradictions. Coaches themselves disagree over why they’re hired, what they do, and how to measure success’ (Coutu &

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Kauffman, 2009, p. 26). In practice, only a small proportion of organizations appear to be formally evaluating the impact of coaching (Bolch, 2001; Hay Group, 2002). In academia, review studies consistently have concluded that there is a paucity of empirical data to support the anecdotal evidence that coaching produces positive outcomes (Feldman & Lankau, 2005; Kampa-Kokesch & Anderson, 2001; MacKie, 2007).

Although the published literature has begun to reflect the emergence of professional coaches (Grant & Cavanagh, 2004), rigorous empirical investigations of the outcomes associated with coaching are greatly outnumbered by practitioner articles purporting the benefits of it. The majority of the studies evaluating coaching are retrospective in nature (Evers, Brouwers, & Tomic, 2006) and use short-term, affective reactions or perceptions of effectiveness as outcomes (Feldman & Lankau, 2005). To improve our understanding of whether executive coaching actually makes a difference on leadership behavior as well as on other individual and organizational outcomes (e.g., employee job satisfaction, employee productivity, organizational performance), much more rigorous research is needed.

However, executive coaching is a multidisciplinary practice. Professionals from many different academic backgrounds such as psychology, human resources, social work, marketing, training and development, and business provide coaching services (Liljenstrand & Nebeker, 2008). There is no professional consensus as to what constitutes effective coaching and little in the way of guidelines and protocols to inform coaching evaluation. MacKie (2007) reviewed the training and psychotherapy literatures and explored how we can learn lessons from these two bodies of research in evaluating the effectiveness of executive coaching. The purpose of this paper is to continue this effort.

The current paper contains two parts. First, we briefly review the literature to understand the current state of the evidence supporting the efficacy of executive coaching. When possible, we use empirically based studies to conduct a meta-analysis of executive coaching outcomes. The remaining studies are carefully reviewed to glean additional information regarding coaching effectiveness. We then address six key issues related to the evaluation of coaching effectiveness. These areas reflect factors which likely impact the efficacy of coaching and should be considered by researchers and practitioners alike when attempting to measure its effectiveness.

### ***Review of executive coaching studies***

Our goal was to conduct a comprehensive meta-analysis of the research evaluating the effectiveness of executive coaching. We used *PsychInfo* and *Business Source Premier* to search for published executive coaching effectiveness studies. We also searched for unpublished studies through cross-references. A total of 22 studies were identified. Unfortunately, many of the studies used a retrospective methodology, failing to collect pre-post assessments necessary for performing a meta-analysis. The focus of those studies was to ask participating individuals (and in some instances, the coaches themselves or the coachees' managers) to simply report their perceptions of the effectiveness of coaching *after* it was completed. Other studies did not report sufficient information to calculate an effect size (cf. Burke & Day, 1986; Smither, London, & Reilly, 2005). Consequently, we divided the 22 research studies into two categories: (a) *empirical studies* from which the gain or improvement from coaching

can be directly observed or indirectly inferred, and (b) *retrospective studies* where the perceived coaching effectiveness was reported (typically through a survey or an interview). Initially, we performed a meta-analysis on those empirical studies that met the necessary methodological and statistical requirements. Subsequently, we conducted a content analysis on the remaining retrospective studies.

#### *Meta-analysis of the empirical studies*

The following four criteria had to be satisfied for inclusion in the meta-analysis: (a) the focus of the intervention had to be exclusively executive coaching; (b) the services of an *external* coach were used; (c) the methodological design was one that provided both pre- and post-coaching ratings; and (d) statistics, such as means, standard deviations or *t* values, and sample sizes had to be reported in the article so that an effect size could be computed.

Overall, 12 empirical studies were identified in the literature. Two of the studies used internal coaches and therefore were excluded from further analysis (Ellinger, 1999; Olivero, Bane, & Kopelman, 1997). One study used a student sample and was excluded (Sue-Chan & Latham, 2004). In addition, one study did not report pre- and post-coaching ratings and was eliminated (Thach, 2002). Two other studies were not suitable for the meta-analysis, because they were based on single cases (Libri & Kemp, 2006; Orenstein, 2006). Consequently, only six of the original 12 empirical studies met these criteria and were included in our meta-analysis.

All six of the studies examined executive skill and/or job performance improvement. Two studies also investigated coaching outcomes related to individuals reporting to the coached executives (e.g., their job attitudes; Luthans & Peterson, 2003) and their organizations (e.g., clarification of organizational vision and mission; Wofred, 2003). Overall, two different types of ratings were collected. Four of the studies measured the responses from the coachee himself or herself (referred to as 'self-ratings'; Evers et al., 2006; Luthans & Peterson, 2003; Peterson, 1993; Wofred, 2003). In contrast, four of the studies assessed the responses of the coach or the coachee's manager (referred to as 'others' ratings'; Luthans & Peterson, 2003; Peterson, 1993; Smither, London, Flautt, Vergas, & Kucine, 2003; Togel & Nicholson, 2005). We conducted separate meta-analyses on skill/performance improvement for the two categories of rater sources. We readily acknowledge that the number of studies included in our analysis is small. Thus, caution should be used when generalizing the findings.

We followed the meta-analytic procedure described in Burke and Day (1986). Initially, a specific effect size was calculated on the criterion variable in each study. If a study had more than one criterion measure, the *average* effect size was used for that study to remove sampling redundancy. Subsequently, this effect size was corrected for unreliability. The 'estimated population true effect size' is the sample size of the study weighted by the observed effect size and corrected for sampling error and unreliability. Table 1 presents the results of the meta-analyses for self and others' ratings, respectively.

An effect size (*d*) simply is a way of quantifying the difference between pre- and post-coaching ratings. It is a statistical way of measuring the effectiveness of a coaching engagement. According to Cohen (1988), an effect size less than 0.30 would be considered small, an effect size between 0.31 and 0.50 would be moderate, and an

Table 1. Results of executive coaching on skill/performance ratings.

Rater Category	$K$	$N$	$V_{\text{obs}}$	$V_e$	Variance Accounted For	$M_{\delta}$	$V_{\delta}$	90% C.V.
Self Ratings	4	173	0.72	0.04	5%	1.27	0.67	0.23
Others' Ratings	4	591	0.40	0.01	2%	0.50	0.45	-0.35

*Note.*  $K$  reflects the number of studies measuring this rating.  $N$  denotes the cumulative sample size of these studies.  $V_{\text{obs}}$  is the observed effect size variance.  $V_e$  is sampling error variance.  $M_{\delta}$  is the estimated population true effect size corrected for sampling error and unreliability.  $V_{\delta}$  is the estimated true effect size variance. C.V. denotes credibility value.

effect size greater than 0.50 would be large. As can be seen, executive coaching generally leads to a moderate-to-large amount of improvement in the coachees' skill and/or performance ratings. This improvement is perceived to be relatively larger by the coachees themselves – an effect size of 1.27 – as opposed to others ( $M_{\delta} = 0.50$ ). Thus, self-ratings of improvement were higher than others' ratings of improvement. Sampling error variance explained only a small portion of variation (i.e., less than 10%) across studies, suggesting that the effectiveness of coaching is really situation specific (Hunter & Schmidt, 1995). This finding reinforces Corporate Leadership Council's (2003) observation that coaching results in inconsistent returns.

The 90% credibility value was *above* zero for self-ratings, indicating that coachees most of the time perceived a positive impact from coaching. In contrast, the 90% credibility value for others' ratings was *below* zero, suggesting that coaching at times lead to some negative outcomes. There could be two reasons for this result. First, the assessment method might be flawed. We will discuss this possibility in detail in a later section of this paper. Secondly, executive coaching indeed may have an adverse impact on some coachees. For example, MacKie (2007) questioned whether executive coaching always had a positive impact. Kilburg (2000) identified several factors in coachees (e.g., lack of motivation, unrealistic expectations, lack of follow-up) and coaches (e.g., insufficient empathy, lack of expertise in the area of concern, poor techniques) that mitigate against a successful coaching outcome.

In sum, our meta-analysis found an overall positive effect for executive coaching. However, readers should be cautioned that this impact can be inconsistent from one coaching engagement to another. Unfortunately, the inadequate number of studies in the meta-analysis and the failure of authors to report sufficient information about the coaching intervention itself preclude us from identifying when coaching will or will not lead to positive results.

#### *Content analysis of retrospective studies*

We located 10 retrospective studies in the literature. Because many retrospective studies included evaluations of multiple criteria, we applied Kirkpatrick's (1977) model of evaluating training interventions to frame the review. However, we used three levels of evaluation rather than four as prescribed in the Kirkpatrick model. Unlike training, coaching usually does not intend to enhance the coachees' knowledge base in an area. Rather, the purpose of most coaching engagements is to change or improve skills or performance. Consequently, the three levels of evaluation used in our analysis include: (a) reactions to coaching; (b) coaching effectiveness (as assessed through change or improvement in skills or performance at

the *individual level*); and (c) coaching impact at the *organizational level*. The evaluation methodology employed by most of the retrospective studies was a post-test measure, with ratings typically obtained via a survey immediately after the coaching was completed. Reported success was in terms of percentage of favorable responses. Table 2 presents the results from these 10 retrospective studies. In addition, we reviewed the three empirical based studies that were excluded from the meta-analysis due to statistical or sampling concerns (cf. Libri & Kemp, 2006; Orenstein, 2006; Thach, 2002).

Overall, the findings from this second group of studies were very positive. Coachees generally were favorable to and satisfied with the coaching provided to them. The percentage of participants reporting favorable ratings in different studies ranged between 75% and 95%. For example, Wasylyshyn (2003) surveyed executives who had been coached between 1985 and 2001. Of the 87 executives, nearly 47% were 'positive toward the coaching' and an additional 29% expressed 'enthusiastic anticipation of coaching.' In general, respondents rated coaching effective at improving their skills and performance, particularly in areas related to the coaching objectives. The coaching also was perceived to have a significant impact on some business results (e.g., productivity, business deliverables). Several authors also provided estimates of return on investment (ROI) of the coaching intervention. For example, McGovern, Lindemann, Vergara, Murphy, Barker, and Warrenfeltz (2001) reported that executives realized improvements in productivity, quality, organizational strength, customer service, and shareholder value, realizing an average ROI of almost six times the cost of coaching. Likewise, Parker-Wilkins (2006) and Anderson (2001) estimated an ROI approximating 700% due to coaching.

While the retrospective studies support the effectiveness of executive coaching, they suffer from several methodological problems. For example, coachees may possess *hindsight bias*, in that their memories may have influenced the data collected (Evers et al., 2006). Furthermore, the managers who experienced coaching might have perceived that it was in their personal interest to report that the coaching worked. Cognitive dissonance also might have been a factor (Festinger & Carlsmith, 1959). After all, their organization spent a lot of money on hiring a coach, plus they personally devoted much effort and time to various coaching activities. It is reasonable to expect that they should report their performance improved. In addition, the evaluation of coaching success in some retrospective studies was conducted by the consulting firm providing the coaching. Although we are not questioning the veracity of the effectiveness ratings, it is in the self-interest of the consulting organization to find positive results. MacKie (2007) declared that data from such studies are 'at the level of collective anecdotes' (p. 311) and have limited usefulness in demonstrating that coaching is effective. Hence, caution is needed when interpreting reported outcomes of these studies, particularly when the research has been conducted by individuals or companies with a vested interest in demonstrating success.

### **Key factors related to the evaluation of executive coaching**

As evident in our review, the effectiveness of coaching has been investigated in a variety of different ways (e.g., use of retrospective versus pre-post research designs, soliciting the coachee's views versus the coach's observations, obtaining global

Table 2. Results of retrospective studies.

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Reaction to Coaching

- 80% of the participants were favorable to the coaching (Talboom, 1999).
  - ‘Very Satisfactory’ . . . This was the way clients most frequently rated the overall effectiveness of their coaching experience on a 5-point scale, where 5 was very satisfactory (Hall, Otazo & Hollenback, 1999).
  - Over 75% of executive reactions to the idea of working with a coach were significantly positive (Wasylyshyn, 2003).
  - Respondents were very satisfied with coaching – 86% rated coaching as very effective; 95% stated they were doing things differently as a result of coaching; and 95% indicated they would recommend coaching to other staff members (Parker-Wilkins, 2006).
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Coaching Effectiveness on the Individual Level

- To determine whether coaching contributed to sustained behavioral change, Genger combined the percentages of ‘highly effective’ and ‘somewhat effective’ statements for awareness and responsibility as these statements were considered coaching outcomes. Percentages ranged from 70.7% to 93.8%, suggesting that coaching contributed to sustained behavioral change (Genger, 1997).
  - At the level of learning, 70–90% of the participants were favorable to the coaching. At the behavioral level, it was over 50% (Talboom, 1999).
  - Participants considered 73% of goals to have been achieved ‘very effectively’ or ‘extremely effectively.’ Other stakeholders were more conservative, evaluating 54% of goals as having been achieved with this level of effectiveness, and 85% as having delivered results ‘effectively’ or higher (McGovern et al., 2001).
  - 55% of the participants increased leadership effectiveness as rated by others; 52% increased as rated by self (Thach, 2002).
  - The top three indications of successful coaching were (a) sustained behavioral change (63%), (b) increased self-awareness and understanding (48%), and (c) more effective leadership (45%). On a 1–10 scale, over half of these coached executives reported a sustainability level between 6 and 8; over a third was at the 9–10 level (Wasylyshyn, 2003).
  - 75% of survey respondents rated the effectiveness of coaching as a 3 or higher on a scale of 1 to 5, with 1 being ‘not effective’ and 5 being ‘very effective.’ Only 15% of respondents rated coaching as a 1 or a 2 (‘Is Coaching Worth the Money,’ 2005).
  - Executives improved significantly and mostly on behavioral dimensions related to the coaching objectives (15 of the 19 items, 79%), some on behavioral dimensions indirectly related to the coaching objectives (4 of the 11 items, 36%), but none on behavioral dimensions that were unrelated to the coaching objectives (Orenstein, 2006).
  - Respondents stated that coaching assisted them in the development of three main competencies: (a) leadership behaviors (82%), (b) building teams (41%), and (c) developing staff (36%; Parker-Wilkins, 2006).
  - Coaching enhanced the executive’s sales performance, core self-evaluation, and global self-ratings of performance (Libri & Kemp, 2006).
  - 96% of organizations reported that individual performance improved since coaching was introduced. Nearly as many (92%) also have seen improvements to leadership and management effectiveness. Of these organizations, 45% and 39%, respectively, have seen significant or major improvements (‘Coaching Counts,’ 2007).
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### Coaching Impact at the Organizational Level

- At the organizational level, the participants asserted they witnessed lower rates of absence among subordinates (Talboom, 1999).
  - 77% of the respondents indicated that coaching had significant or very significant impact on at least one of nine business measures. Productivity (60% favorable) and employee satisfaction (53%) were cited as the most significantly impacted by the coaching (Anderson, 2001).
  - 35% improved on leadership. 28% improved as management team. 33% improved on business deliverables. And 67% improved on personal balance ('When Coaching Measures Up,' 2005).
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perceptions versus dimensional ratings, measuring behavioral changes versus skill improvement, assessing individual-level improvement versus organizational-level outcomes). Some studies have attempted to measure ROI. Obviously, researchers have different opinions regarding how coaching should be evaluated. In this section, we address several key issues related to the evaluation of executive coaching. Initially, we review three factors directly related to the measurement of coaching effectiveness, including: (a) the purpose of evaluation; (b) the evaluation criteria used; and (c) the rigor of the evaluation employed. Subsequently, we consider factors related to (d) the type of coaching provided; (e) the content of coaching engagement itself; and (f) the coaching methodology a coach applies. These latter factors likely serve as moderating conditions influencing the overall effectiveness of the executive coaching assignment. It is hoped that a careful examination of these six factors will help develop a consensus among researchers and practitioners regarding how executive coaching should or should not be evaluated.

### *Measurement and methodology issues*

*Purpose of the coaching evaluation.* From a program evaluation perspective, there basically are two different types of evaluation – summative and formative. A *summative evaluation* measures the outcome of a completed intervention program. In contrast, a *formative evaluation* assesses current, ongoing program activities, provides an internal process that compares the planned program with the actual program, and measures the progress toward meeting the program goals.

Executive coaching practitioners and researchers alike need to conduct summative evaluations to demonstrate the merits of coaching. Did the coaching accomplish the client's objectives or not? However, executive coaching very often is characterized as a sequential process. Coaches have to carefully plan and execute a number of stages during the engagement for the achievement of the *ultimate* coaching objectives. Process elements, such as the relationship between coach and coachee, are critical for coaching success (Kampa-Kokesch & Anderson, 2001). Leedham (2005) identified five success criteria of coaching. Three of them are related to the coaching *process* itself. Similarly, Bush (2005) in her dissertation study investigated how clients consider an executive coaching event effective. She found that process-related factors (e.g., focus on development, rapport with the coach) were one type of success criteria. Given the impact that the quality of coaching has on its effectiveness, it is necessary for coaches to integrate formative, ongoing evaluation

into their coaching. Coaches should continuously monitor the coaching process, identify problems in a timely manner, and adjust and readjust their coaching activities as the process unfolds. Evaluating executive coaching requires an integrated framework that includes *both* summative and formative components (Ely, Nelson, Boyce, & Zaccaro, 2008).

*Criteria used to evaluate coaching.* Related to this issue are two questions. First, is the ultimate criterion of coaching ROI? Second, can there be a single outcome criterion for all coaching interventions? Coaching is expensive. A six-month engagement for one executive can range between \$15,000 and \$75,000. Moreover, coaching requires regular intervals of highly compensated executive time (Johnson, 2007). Organizations are asking hard questions about the ROI. Human Resources (HR) and talent management leaders want to control expenses spent on external coaches, ascertain the organizational and financial impact of such coaching, and justify coaching budgets to senior leadership. The request for the evidence of ROI is legitimate, but not always practical. Executive coaching has been used to enhance skills and improve performance in a wide range of organizational arenas. It can have tangible and intangible effects on organizational effectiveness to varying degrees. McDermott, Levenson, and Newton (2007) found that coaching has a larger positive impact on micro-level outcomes (e.g., improving leadership behaviors and individual employees' performance) than on macro-level outcomes (e.g., strategy execution and change management). It is likely that a coaching intervention is too many causal linkages away from financial results to demonstrate direct and significant relationships (Feldman & Lankau, 2005).

Some researchers have tried to quantify the ROI of executive coaching. For example, one case study in a Fortune 500 company reported that coaching produced an ROI of 529%. This figure was boosted to an overall ROI of 788% when including the financial benefits of enhanced employee retention (Anderson, 2001). Another study claimed that when calculated conservatively, ROI averaged nearly \$100,000 or 5.7 times the organization's initial investment in coaching (McGovern et al., 2001). A close examination of these two studies indicates that the ROI numbers were derived subjectively through retrospective questionnaires and interviews. We do not criticize such methodology out of hand. It simply becomes very tenuous to draw firm cause-and-effect financial conclusions through such a perceptual-based, qualitative process, and generalize the numbers to other coaching events. Overall, the difficulty with ROI investigations may be inherent in executive coaching itself.

It should be noted that the computation of ROI appears to be largely context specific. The ROI metric depends on two key factors: (a) the overall cost an organization incurs implementing the coaching engagement, and (b) the financial benefits it obtains. These items are extremely difficult to measure and are highly unique to the specific coaching assignment. Obviously, the fee structure of different coaches varies greatly. Likewise, the organizational level and size of company of the coachee varies greatly. A Chief Executive Officer (CEO) can have a powerful impact on an organization; a mid-level manager less so. Some executives work on million-dollar deals, while others work on billion-dollar ones. In order to make meaningful conclusions regarding ROI – and to compare ROI across studies – all facets of the coaching engagement must be considered and measured, including the coaching costs and executives' enhanced organizational value. Such factors as the expertise of

the coach, length of coaching engagement, and organizational support for the coaching also may play a pivotal role in success. In addition, the level of motivation and commitment of the executive who is being coached must be considered. We are not stating that it is impossible to compute ROI, but it certainly is very, very difficult to do so.

After reviewing the psychotherapy literature, MacKie (2007) suggested that a professional consensus on appropriate outcome domains needs to emerge for valid comparisons to be made across interventions and studies. We echo MacKie's contention. However, based on the above discussion around ROI, we believe that the omnibus outcome criterion cannot be ROI. Perhaps, the best single outcome criterion is the *coaching objective*. Coaching interventions can be evaluated against the goal(s) for which the coaching is designed to achieve. It has been widely recommended that executive coaching should have clear coaching objectives (cf. Valerio & Lee, 2005). Research has found that when organizations fail to clearly articulate objectives, coaching is far less likely to succeed (McDermott et al., 2007). For any engagement, the coaching goals and the success criteria should be understood and agreed to between the coaches and the clients at the outset of the coaching relationship (Valerio & Lee, 2005). In practice, however, the coaching objectives frequently evolve during the coaching engagement (Peterson, 2002; Valerio & Lee, 2005). Recently, Coutu and Kauffman (2009) surveyed 140 coaches to understand current realities surrounding executive coaching. They found that coaches overwhelmingly agreed the focus of coaching sessions typically shifts during the course of an engagement. Consequently, it seems important to continue to communicate coaching objectives among the coach, coachee, and other stakeholders throughout the engagement. It would appear that the ROI of coaching largely depends on how directly the coaching objectives correspond to business or organizational requirements (Corporate Leadership Council, 2003). Some coaching assignments have the potential for creating great change in organizational results; whereas, others may change only one individual's satisfaction with the job or another individual's satisfaction with the executive being coached.

*Rigor of the coaching evaluation.* Finally, there are three topics related directly to the rigor of evaluation of coaching itself. The first topic focuses on the research design implemented to assess executive coaching. It is generally agreed upon that the research design with the highest methodological rigor is a *pre-post, control group design* (Campbell & Stanley, 1963). If researchers used such a design to evaluate executive coaching, they would be able to control many threats to internal and external validity. However, typically executive coaching is a one-to-one relationship between a coach and an executive. The fact that different executives have different coaching objectives may make a control study not possible. Indeed, it may be unrealistic to conduct control studies in many field settings (Goldstein, 1986; Sackett & Mullen, 1993). A pre-post design is probably the most appropriate study with an adequate level of methodological rigor. Whatever design is implemented, a concerted effort to employ rigorous evaluation procedures is needed (Feldman & Lankau, 2005).

A second topic related to evaluation rigor focuses on the assessment instrument employed to measure coaching effectiveness. Many authors contend that a 360-degree assessment is an important part of the coaching process (Feldman, 2001;

Judge & Cowell, 1997; Wasylshyn, 2003). Logically, we can compare the pre- and post-coaching 360-degree assessment data to examine whether the coaching lead to higher ratings. However, many researchers have opposed direct pre-post comparison as a measure of improvement for several reasons (see Buda, Reilly, & Smither, 1991; Smither, Reilly, & Buda, 1988). For instance, the raters themselves may change between 360-degree evaluations due to employee attrition or the hiring of new employees. Further, the observed improvement is confounded by beta change and/or gamma change (Golembiewski, Billingsley, & Yeager, 1976). When *beta change* occurs, the rater's yardstick for the variable shifts or stretches, such that benchmarks on the scale do not remain constant between the two assessments. *Gamma change*, on the other hand, involves a redefinition or reconceptualization of key variables. Consequently, researchers need to improve the psychometric quality of the 360-degree assessment or design alternative assessment methods. Smither and Walker (2001) suggested approaches such as retrospective ratings of the degree of change; whereby, coworkers rate the extent to which the coachee's performance has improved with respect to each of the improvement goals he or she set.

The last topic related to the evaluation rigor of coaching pertains to the integration of executive coaching with other leadership developmental interventions. Executive coaching frequently is implemented in conjunction with other developmental activities, such as 360-degree feedback (Luthans & Peterson, 2003; Smither et al., 2003), goal setting (Grant & Cavanagh, 2007), or managerial training (Olivero et al., 1997). Preferably, researchers can use control groups to separate the effects of different interventions. However, as discussed previously, it often is unrealistic to design control studies in field settings. More importantly, it may be unnecessary to isolate the effects of the executive coaching engagement from the other developmental activities. If coaching truly is a holistic process which integrates a variety of interventions, we simply have to demonstrate its overall value to organizational decision makers rather than delineate specific effects. From a research perspective, obviously, it is useful to carefully isolate the unique contribution of coaching. A potential approach to do this is to measure the overall effectiveness of the intervention. Subsequently, researchers can estimate the effectiveness of coaching by subtracting the effects due to the other interventions.

### *Factors moderating the effectiveness of coaching*

*Type of coaching provided.* In general, the literature has shown that recipients of executive coaching services typically fall into two broad categories: (a) executives who had performed highly in the past but whose behaviors now are interfering with, or not sufficient for, current job requirements; and (b) managers who have been targeted for advancement to the executive level but are missing some specific skills for those future jobs (London, 2002). Historically, the focus of coaching has been to help executives who were derailing (McCall, Lombardo, & Morrison, 1988). Today, it is increasingly common to provide coaches for managers to work on personal learning, transition, and leadership developmental issues (Coutu & Kauffman, 2009; Kiel, Rimmer, Williams, & Doyle, 1996).

The effectiveness of executive coaching is probably related to its overall coaching purpose. The objective of coaching when addressing a 'derailing' executive is to

eliminate or modify a behavioral pattern. In contrast, the purpose of developmental coaching is to strengthen or expand a behavioral pattern. The two types of coaching require different levels of effort from executives. Executives may be more motivated toward one type of coaching than the other. Coaching is a helping relationship, which is formed between an executive who has managerial authority and responsibility in an organization and a coach. The coach has no formal authority over the executive (Kilburg, 2000). Consequently, it is largely up to the executive's self-control and motivation to follow the coaching agenda and act on the improvement plan. A coach can be instrumental in encouraging and motivating, but ultimately, the changes must be embraced by the executive (Witherspoon & White, 1996). Many executives resist coaching (Goldberg, 2005; McDermott, 1996). This resistance may be stronger when the type of coaching is remedial rather than developmental. Coaching would seem to be less successful when executives are defensive and unwilling to look inward, than in situations of growth, development, and advancement (Coutu & Kauffman, 2009).

*Content of the coaching engagement.* The specific coaching content and objectives can vary widely across engagements, addressing issues beyond what is defined typically as leadership behavior, such as career counseling and business acumen. Coaching is probably effective to varying degrees at improving job skills and performance, depending upon the specific content area being tackled. Some areas are explicit (e.g., task and cognitive skills). They can be understood readily and internalized by executives. Other areas are tacit, embedded typically in individual experiences and involve intangible factors, such as personal beliefs, long-held assumptions, and internal perspectives. Because of their unstated nature, executives may be unaware of them. The development of these areas requires self-discovery, deep learning, and sometimes fundamental changes in one's value system and behavior pattern (Brantley, 2006). Future researchers should consider coaching effectiveness in light of the specific content area being coached.

*Coaching methodologies.* The effectiveness of executive coaching may also be related to the coaching methods employed. Coaches from different academic disciplines are likely to use different methodologies to help their clients. These methods include psychodynamic techniques (Kilburg, 2004), behavioral therapy (Sherin & Caiger, 2004), cognitive-behavioral approaches (Ducharme, 2004), and adult learning (Axelrod, 2005). Different coaching methodologies may be effective at dealing with different content areas. In other words, coaching effectiveness may be an interaction between the coaching method employed and the coaching topic addressed. Liljenstrand and Nebeker (2008) surveyed over 2,000 coaches and found a significant interaction between academic backgrounds and client goals, suggesting that coaches from different disciplines are hired to accomplish different objectives for their clients. For example, they discovered that coaches with business backgrounds were hired more often than other groups to coach individuals on task skills (e.g., sales) than for interpersonal relations (e.g., building trust, improving listening skills, and adapting to change). On the other hand, coaches from an industrial/organizational psychology or clinical background were hired more often than other groups for engagements to enhance interpersonal skills and make work relationships more effective (e.g., improving communication and listening, building trust). Overall,

it seems reasonable that coaching would be most likely to be successful when the coaching methodologies ‘fit’ the coaching objectives.

### **Discussion and conclusion**

The purpose of this paper was to continue the efforts initiated by other scholars to address the paucity of coaching effectiveness research in the literature (Feldman & Lankau, 2005; MacKie, 2007). Since coaching practitioners come from many different professional backgrounds, an exploration of issues fundamental to coaching evaluation can help build a common awareness that can guide future research and practice. Toward achieving this objective, we first reviewed the literature to understand the current state of executive coaching effectiveness. Both the meta-analysis of the empirical research and the review of the retrospective studies revealed an overall positive effect of executive coaching. We highlight the following observations:

- (1) Overall, executives and companies are favorable toward coaching.
- (2) Coaching works. Specifically, the meta-analysis demonstrated that executives made a moderate-to-large gain in skill and/or performance.
- (3) Individuals who experience the coaching (self-ratings) report stronger effects than do others (others’ ratings).
- (4) Coaching impacts a wide array of individual and organizational outcomes, such as individual skills and behaviors, team performance, productivity, employee job satisfaction, and some measures of business deliverables.
- (5) Some research suggests that coaching has the most positive impact when tied directly to coaching objectives.
- (6) The return from coaching was inconsistent. Coaching impact varies from situation to situation, and even may lead to negative outcomes in some circumstances.

We then explored and discussed six areas that influence the way researchers and practitioners evaluate coaching effectiveness and affect the corresponding conclusions that they may draw from their findings. The six areas and the major discussion points include:

- (1) The purpose of coaching evaluation – summative versus formative evaluation.
- (2) Criteria used to measure coaching effectiveness – ROI versus coaching objectives.
- (3) Rigor of the coaching evaluation – the research design employed to assess coaching.
- (4) Type of coaching implemented – developmental versus remedial.
- (5) Content of the coaching engagement – skill acquisition and behavioral change versus unconscious discovery and deep learning.
- (6) Coaching methodologies – the interaction between the coaching methods and coaching content.

In some cases, we offered specific suggestions for future assessment. For example, we recommended that executive coaching should be evaluated against a single or several individual-level criteria rather than using an overall organizational-level index such as ROI. It appears to us that the objectives of the coaching engagement, which are developed between the coach and the client are the most appropriate criteria on which to gauge coaching efficacy. Likewise, we suggested that researchers and practitioners should conduct ongoing formative evaluations, as well as a summative evaluation at the end of the engagement, to enhance the overall quality of the coaching process. We discussed how coaching effectiveness may be contingent on several factors. As our meta-analysis indicated, there is an inconsistent relationship between executive coaching and coaching outcomes. Researchers should systematically investigate how coaching effectiveness is moderated by the purpose, content, and type of coaching.

Researchers should consider adopting a stage approach to coaching evaluation. For example, Hicks and Peterson (1999) propose that coaches facilitate the development of executives through five phases – insight, motivation, capabilities, real-world practice, and accountability. Similarly, Lombardo and Eichinger (2001) articulate an ‘ABC Coaching Model’ that guides the coaching process through the following six steps – awareness, acceptance, acting, building, blending, and having consequences. Regardless of the coaching model one follows, each stage has its unique coaching objective. Very often the achievement of the objective at one stage is necessary for the achievement of the objective at a subsequent stage. A complete coaching evaluation should be able to assess all the stages, so we can understand which stages are most critical to coaching success.

Based on this logic, Leedham (2005) proposed a holistic approach to evaluating executive coaching. It is a pyramidal model of evaluation. At the bottom of the pyramid are four key factors: (a) the skills of the coach, (b) the personal attributes of the coach, (c) the coaching process, and (d) the coaching environment. At the next stage are the levels of inner personal benefits (e.g., clarity and focus, confidence, and motivation). The realization of the inner benefits is conducive to the outer personal benefits (e.g., enhanced skills, knowledge, and understanding; improved behaviors). Finally, with these enhanced skills and improved behaviors, the executive will be equipped and empowered to achieve the pinnacle of the pyramid (i.e., business results). Leedham (2005) is a good example of the stage model of coaching evaluation. We do not suggest that this model can be applied to all coaching interventions, because the coaching methods and the coaching topics vary from one intervention to the next. An ideal evaluation model should be simple and capture the essentials of the different types of coaching.

We also raised the question of the rigor of evaluation implemented. Researchers should clarify what constitutes rigorous empirical research in the literature of executive coaching, and how to quantify effectiveness. Likely, researchers will have to decide if it is necessary to separate the contribution of coaching from other leadership developmental interventions. And, if it is necessary, how do we ascertain coaching’s unique impact in a field setting?

Retrospective questionnaires are likely to be the workhorse methodology for coaching studies for some time to come, given the difficulties of implementing rigorous research designs in the coaching field. It would be helpful if we develop better instruments for this purpose. Appropriate scaling, relevant dimensions, rater bias issues, and so on can be refined toward the goal of having a few reasonably

standard questionnaire formats for use by researchers. Such questionnaires should be appropriate to the type of coaching, the organizational level of the coachee, other developmental efforts affecting the coachee, and of course the specific objectives of each coaching engagement.

During the 1970s, Schmidt, Hunter, and Urry (1976) presented the concept of validity generalization to demonstrate the validity of various personnel assessments. The authors persuasively argued that one should be able to accumulate validity coefficients across several different empirical studies, weight the findings by the respective sample sizes, correct for the unreliability of the psychological measure, and then derive an overall index of validity. Their approach became the foundation for meta-analysis. A popular measure advocated by some authors today is the concept of ROI. By using such an all inclusive, straightforward index, the 'return on investment' of an intervention such as coaching can be calibrated easily. Unfortunately, the realities of executive coaching engagements are not that simple. The expertise of the coach, the length and intensity of the coaching assignment, the level of the organization where the coachee resides, the receptivity of the manager receiving the coaching, whether the coaching is for developmental or remedial reasons, the culture of the organization, and a myriad of other individual and organizational factors all can directly and indirectly affect that ROI index. We believe that the desire to sum findings across studies and deduce a single measure of effectiveness must be weighed in light of the danger of arriving at an erroneous or misleading ROI answer.

Many senior executives and HR directors probably understand the limited value of an overall ROI number; therefore, they look to a panoply of global indicators of coaching success (e.g., job satisfaction; organizational commitment; attitudinal, behavioral, and relationship changes). A coach is responsible for helping a number of stakeholders set reasonable expectations based on what seems achievable once the coaching engagement is under way. In other words, *formative* evaluations and emerging objectives should impact the way the *summative* evaluation is designed.

We also should consider the possibility that a more useful measure of validity may be one that is associated with the coach rather than with the coaching process in general. As with other professionals, some practitioners are consistently more effective than others. There is almost no research assessing the effectiveness of individual coaches; nor is there an easy way to design such research. In practice, however, the reputations and references of experienced coaches carry the greatest weight when it comes to decisions about whom to hire. Certainly, it is here that we must look if we are to identify what makes for excellence in coaching.

Also, at the individual level, there continues to be a great need for well-reported case studies of successful and not-so-successful coaching assignments. Some of us may not see this as 'research' in a pure sense, yet instructive cases are perhaps the best way to open the 'closed door' that Hall, et al. (1999) identified as a barrier to understanding coaching. The most important learnings about coaching can be lost in research designs that examine only correlation coefficients, statistical averages, and curvilinear trends.

In conclusion, the empirical research assessing the effects of coaching has lagged significantly behind the practice of coaching (Grant & Cavanagh, 2004). We are hopeful that the six key areas related to coaching evaluation we identified in this paper will serve as a springboard to improve assessment practices in the future. The possibilities of coaching are endless. The necessity for coaching tomorrow's leaders is

critical. And the opportunities for practitioners to substantially impact the business world are great. However, the effectiveness of executive coaching needs to be clearly and scientifically demonstrated for us to achieve these desired outcomes.

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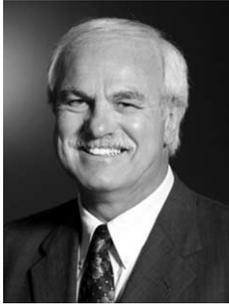
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Note. Asterisked (\*) references were included in meta-analysis.

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