SEVEN WAYS TO MEASURE COACHING OUTCOMES

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TRACKING SUCCESS

A powerful way for coaches to strengthen their professional allure is through documenting their success in helping clients achieve their goals.

When a coach shows a track record of positive results, it establishes a sense of credibility and trust that helps cement a coaching relationship. When potential clients learn that others have achieved excellent results by working with the coach, it can influence their decision to move forward and incentivize them to stick with the process long enough to experience success.

It's unlikely that potential clients would hire a coach if they did not believe the coach had the skills and capacity to help them achieve their goals. At iPEC, we know that our coaches get results. In a 2018 study of Core Energy™, certified coaches used the Energy Leadership Index™ Assessment (ELI) as a measure of change for 695 clients receiving coaching between 2013 and 2017. The clients completed the ELI twice during their coaching engagement (iPEC coaches are encouraged to give the ELI to clients at the beginning of a coaching engagement and again at or near the end of the engagement). Time between ELI administrations ranged from three to thirty-six months.

The data showed that eighty percent (80.1%) had experienced an increase in energy, as measured by their Average Resonating Level (ARL) and seventy-one percent (70.9%) had reported an increase in overall life satisfaction.[1]

Other client's ARLs stayed the same or dropped slightly on the post-assessment, likely due to changes in life circumstances that created momentary stress, such as a job loss or divorce. It's also possible that by increasing their conscious awareness of their thoughts through coaching, they provided more honest answers the second time around. Regardless, the high rate of positive change in clients' ARL creates a compelling case for Core Energy™ Coaching that is based on statistical evidence.

[1] (iPEC, 2018). Your core energy determines your life potential. Waldorf, Lynn. Unpublished raw data.

There are additional benefits in measuring, or evaluating, the impact of coaching:

- An evaluation plan helps ensure that well-defined **goals** for a coaching partnership are established up front.
- When a coach and their clients determine what to measure, it increases **accountability,** heightens self-reflection, and arouses a sense of urgency to take action toward goals.
- In multi-month coaching engagements, establishing checkpoints along the way helps clients see where they are achieving **progress** and where they may need more support. This helps clients focus on process, even while pursuing longer-term objectives.
- At the end of a coaching engagement, reviewing the outcomes can help clients realize the whole of their progress and more accurately assess the **total value** of coaching.
- Sharing positive results can raise a coach's **confidence** in their own capabilities while enhancing their image and reputation as an expert.

For coaches who have no background in statistics or evaluation, measuring the results of one-on- one coaching sessions can seem like a daunting task. However, in most cases, it can be a relatively simple process:

(1) Goals for the coaching partnership are determined,

(2) Tools are selected to measure the extent to which the goals are met,

(3) Data is gathered at appropriate intervals,

(4) The resulting information is analyzed and interpreted, and

(5) The outcomes are shared with the client.

Typically, the client's goals and degree of interest in tracking progress are used to determine what gets measured. In addition, coaches may wish to collect feedback on the effectiveness of their work with their clients. Whatever method is used, it's critical to obtain buy-in up front so clients will complete the required assessments promptly during the data collection period.

In business and executive coaching, a multi-level evaluation can be used to document the personal and professional transformation of leaders and team members, plus calculate the impact of the coaching program on the bottom line. The results help decision-makers justify the investment in coaching over other professional development investments. Due to the increased complexity of measuring the effects of coaching on business and the return on investment, corporate coaches who lack a background in evaluation may want to work with a qualified evaluator to develop an effective plan and choose appropriate instruments.

EFFECTIVE TOOLS AND STRATEGIES

There are a variety of tools that can be used to document the tangible and intangible effects of coaching. Here are seven methods that iPEC coaches can use as a starting point in developing a personalized system of collecting evidence that demonstrates their effectiveness.

1. Testimonials

A simple way to collect evidence on the success of coaching is to ask clients for a testimonial. A heartfelt expression of gratitude from someone who has experienced a life-altering transformation or achieved an important goal can be a powerful credibility booster.

Testimonials are excellent marketing tools with a multitude of applications.

They can be listed on a website or landing page, adapted for email marketing, shared in blogs, printed on flyers, included on book covers, and reformatted for social media posts, to name just a few ideas. For these reasons, it is useful to collect as many testimonials as possible.

To get stronger, more specific testimonials, ask your client to not only describe in one or two sentences how your coaching helped them, but also state their pre-coaching situation and the tangible results they achieved. For example, if you are a relationship coach, your client could describe how you helped her improve her self-confidence and how, six months later, she met her life partner (and how these two are connected). If you are a health and wellness coach, your client could describe how you helped him reduce stress and anxiety, have more fun at work, and as a result, be seen as a positive force and get promoted. Also, you will want to get written permission before including a client's name or location with their testimonial in print or online.

2. Client Satisfaction Survey

Another way to document a client's satisfaction is by having them complete a short survey at the end of the coaching engagement. If you are meeting in person, it's best to supply a pen and paper survey to complete that day. You can also use an online version and send it after the fact, but the completion rate is typically much lower.

A client satisfaction survey ideally consists of no more than 10 items to avoid response fatigue. On the survey, ask your client to rate their level of satisfaction with several aspects of their coaching experience. The items generally use a rating scale or may ask for short, written responses. Examples of items from client satisfaction surveys are:

- *On a scale of 1 to 5, with 1 being "completely dissatisfied" to 5 being "completely satisfied," how satisfied are you with your coach's effort to listen and understand your challenges and goals?*
- *How satisfied are you with your coach's ability to help you get to the bottom of things and shift your understanding of your challenges?*
- *How satisfied are you with the progress you have made toward achieving your goal?*

The items on the survey should primarily reflect the objectives of the coaching agreement, but a coach can also use the satisfaction survey to learn about their level of effectiveness as an agent of change. Asking a client to complete a satisfaction survey halfway through a coaching contract can also be helpful in improving or re-directing the relationship if needed. There is a broader application as well. A coach can collect the same data from many clients, determine the average rating for each item, and use the results in marketing materials to enhance their credibility.

3. Learning Outcomes Questionnaire

If a client's goals include acquiring knowledge or new skills, or if the outcomes reflect a new attitude or perspective, you can develop a simple questionnaire to capture those gains. In this situation, the items would primarily be open-ended, encouraging a client to provide written details about their experiences. Some examples are:

How have your communication skills improved through coaching?
How have you altered your approach to time management?

You can also include a performance measure that uses a rating scale of 1 to 5 or 1 to 10 to gain a more comprehensive picture of the impact of coaching. Hint: be sure to define your scales (1= ... 5 = ...)!

If a client is using iPEC's client materials (Energy Leadership Development System™ (ELDS), The Law of Being™, COR.E Dynamics™ workbooks, or the companion program for Bruce D Schneider's book, Uncovering the Life of Your Dreams), or any courses you've created, the questionnaire could include one or two items based on their assignments from each section. Clients will appreciate being able to refer to the materials and their notes when responding.

Another way to document learning outcomes is to interview clients, record their comments, and have them transcribed. It is best to collect this type of evidence as clients finish each segment, when the information is freshest in their minds. Their answers provide the data for writing a summary brief of what they learned and will continue to function as a reminder of the value received from their coaching experience long after it is over. It could eventually result in repeat business.

4. Repeated Measure Self-Rated Surveys

A more accurate way of documenting the change in a clients' knowledge, attitudes, and perspectives over the course of the coaching engagement is to have a client complete a brief self-rating survey at specified intervals to denote progress. In this case, the survey would include items that reflect the goals and objectives of the coaching agreement.

The Wheel of Life or Leadership Wheel might be appropriate tools to use for a repeated measure.

Essentially, any of the wheels that reflect a client's desired outcomes can be used. If a client is working on one topic, the coach and client can use a blank wheel and decide on the criteria to be measured, customizing the assessment process.

Once the instrument is created or selected, the client would typically complete it at the beginning of your work together to establish a baseline for measuring growth. The client would complete it again in the middle and end of the coaching engagement to compare their ratings. It could also be completed bi-monthly or quarterly, depending on the length and intent of the coaching agreement. If the results from a periodic assessment indicate they are not making desired progress, it's a good time to talk about what is holding them back, and what they would like to do about it.

You can create a customized repeated measure survey that can be used to track mastery or performance goals, depending on a client's interests.

It can cover any number of criteria or performance factors, but it's important to be realistic about whether the factors are being affected by the coaching relationship. Ten to 15 items are generally more than enough. To complete the survey, clients rate each item using a five-point rating scale. For a more fine-grained analysis, try a 7 or 10-point scale. Here are some examples of items you could use in a repeat measure survey for someone working with you on communication:

On a scale of 1 to 7 (1= poor, 7=excellent), please rate your ability to clearly communicate your message:

- *During face-to-face interactions*
- *In emails*
- *(insert other situations on which you and your client are working)*

It is best if repeated measure surveys or assessments take no more than 10 to 15 minutes to complete, to keep a client's interest high. Progress becomes self-evident when results are compared over time, across all surveys.

5. Energy Leadership Index™

If a client wants to work on raising their energy and expanding their consciousness, the Energy Leadership Index™ (ELI) assessment can be used to measure their progress.

The ELI is a scientifically validated instrument that measures a person's energetic make-up. It is commonly used as a baseline assessment, to help determine the focus for a coaching relationship and to introduce the seven levels of energy. The ELI can also provide excellent comparative data if a client re-takes it at the mid-point and/or end of a shorter coaching engagement as a post-comparison. It's a good idea to allow at least six months of coaching sessions between an ELI pre-assessment and post-assessment to obtain the best comparative results.

Key points to compare with regard to repeated ELIs are the change in a client's ARL and in the amount of anabolic and catabolic energy expressed in their Energetic Profile and Energetic Stress Reaction charts.

A change in ARL indicates a shift in perspective has occurred. Even a small, positive change can be life-altering if it affects a person's thoughts, emotional responses, and subsequent behavior.

While it's possible for clients working with an iPEC-trained coach to experience a notable energy shift relatively quickly, the research shows that a significant and sustained change in ARL (an increase of .05 or more) is more predictable after 12 weekly coaching sessions. Note: It is rare, but not unheard of, that a client sees a drop in ARL or an increase in catabolic energy. This could be due to a change in the client's life circumstances (job loss, illness, divorce, etc.), or to more awareness and thus more realistic answers to the items on the ELI. This does not mean that coaching didn't work!

The ELI assessment includes 14 items measuring aspects of life satisfaction. Similar to the Wheel of Life, pre/post self-ratings of the 14 items reveal where positive changes have occurred in different areas of their life as a result of coaching and can help identify additional areas for growth.

6. SCOPE

In 2016, iPEC launched a free mobile app called SCOPE (Specific Current Operational Profile of Energy).

SCOPE measures energy in the moment and can be used to enhance a client's ability to consciously increase their energy and performance potential ahead of a specific task or activity. A client opens the app and answers 39 quick-response items that indicate which energy levels they are experiencing as well as measure their level of energetic engagement, or "Performance Factor," regarding an upcoming task. The higher their Performance Factor, the more likely the client will perform to the best of their ability.

The tool assesses which factors (spiritual, mental, emotional, physical, social, and/or environmental) are influencing a person's energy in the moment and provides some strategies for raising one's energy. After the activity or event, the client can then complete a follow-up SCOPE, while focusing on what they felt while it was happening.

By tracking the results of repeated SCOPE assessments over time, it's possible to measure the increase in energy and change in performance associated with using the app as a tool for self- reflection and growth.

It is also key in understanding what factors affect performance.

The app is available as a free download in app stores (search for "iPEC SCOPE"). While anyone can use the SCOPE app, coaches must complete the COR.E Dynamics graduate program and pay a small monthly fee to access client results and to gain full access to tracking and reporting capabilities.

7. Performance Assesments

A performance or outcome assessment is used to record actions taken by a client toward a stated goal and the outcomes achieved by the end of the coaching engagement.

The point is to record what ultimately occurred as a result of coaching.

Did they win the violin competition? Find a new relationship? Lose ten pounds? Get a promotion or new job? Improve their communication skills? Consider a weight loss coach who has baseline and periodic progress data that shows that eighty percent of clients who coached with him for a year lost at least thirty pounds. These results demonstrate value, describe the actual benefits received by clients, and enhance the coach's credibility.

Coaches can document both mastery goals and performance outcomes through session notetaking, pre/post surveys, criteria checklists and questionnaires, and exit interviews. An excellent way to track performance results is by recording relevant data and taking notes during each session and then consolidating those notes at the end of a coaching engagement in a one-page summary.

Reviewing the outcomes with the client is an excellent way to celebrate their progress and discuss the benefits of coaching.

The results may prompt a conversation about continuing to work together. The final review session is also an excellent time to ask for a written testimonial based on the client's progress. As with client satisfaction surveys, the response rate is best if time is set aside for the client to write the testimonial on the spot.

A GLOBAL IMPACT

Measuring the outcomes of a coaching relationship benefits the coach if the information gathered is put to use in future marketing. Certainly, the client benefits from being able to reflect on their growth. They may also share their results with others, resulting in referrals.

iPEC is also very interested in collecting client coaching stories to study trends in coaching processes and outcomes. The information informs the development of iPEC training curricula, as well as research-based articles and other marketing tools for the coaching community.

All coaches benefit from sharing their results, as the data helps grow iPEC's reputation as a top coach training program. In turn, it enables iPEC to promote its graduates around the world more effectively.

iPEC's research department has created and field-tested a case study portal that allows iPEC coaches to upload results from their clients to a secure online location. The portal is managed in compliance with GDPR EU privacy laws. It represents a groundbreaking opportunity to participate in an on-going, global research project that highlights specific benefits of working with an iPEC-trained coach.

The hyperlink to the portal is **https://www.surveymonkey.com/r/clientcase.** It contains an online questionnaire that guides coaches through a step-by-step process of reporting the results of a one- on-one or group coaching in about ten minutes. Coaches are encouraged to upload multiple cases studies from as far back as 2015, though the results must be entered one at a time to be useful for analysis. Once the data is entered, it is reviewed by researchers, stripped of personal identifiers, consolidated with other cases, then analyzed to identify and report on notable trends in coaching practices and outcomes.

By submitting their stories, coaches demonstrate their commitment to empirical research and to participating in the knowledge-building and promotion of coaching as a worldwide profession.

For more information on the case study portal, please contact the iPEC research department viaresearch@iPECcoaching.com.

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