• Yes, You Can (and MUST) Measure the Results of Executive Coaching!

Chris Pollino
Executive Talent Development
Genentech

Karen Mathre, PCC
Enterprise Coaching Practice Leader
Medtronic

Patrick Murphy, ACC, CPC
Director of Coaching
GSK

BRIAN O. UNDERHILL, Ph.D., PCC
Founder & CEO
CoachSource, LLC

Twitter: @bunderhill
LinkedIn: linkedin.com/in/coachsource
Mini-Survey Report
Joe Sample

Rater Groups

<table>
<thead>
<tr>
<th></th>
<th>Self</th>
<th>Direct Reports</th>
<th>Peers</th>
<th>Supervisor</th>
<th>Other Colleagues</th>
<th>Upper Management</th>
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In the past six months, has this leader asked for input from you concerning how he/she can improve?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
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<tr>
<td>Direct Reports</td>
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<tr>
<td>Supervisor</td>
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70% 30%

Over the past six months, how often has this leader followed-up with you concerning how he/she could improve?

<table>
<thead>
<tr>
<th></th>
<th>None</th>
<th>Little</th>
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<td>Supervisor</td>
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<td>1</td>
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10% 20% 30% 40% 0%

Do you feel this leader has become more effective (or less effective) as a leader in the past six months?

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<thead>
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Individual Areas for Development

Genuinely listens to others

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10% 40% 50%
Who is Here Today?

- Corporate Coaching Manager
- External Coach
- Internal Coach
- Other
Why Do We Need To Measure Coaching Results?
Our Panelists

Chris Pollino
Executive Talent Development
Genentech

Karen Mathre, PCC
Enterprise Coaching Practice Leader
Medtronic

Patrick Murphy, ACC, CPC
Director of Coaching
GSK
### Who Delivers?
- **External coaches**
- **Internal leaders who receive year long coaching certification**

### Who Receives?
- **Primarily Directors and above**
- **Hipo leaders**
- **Available to all GSK employees worldwide**

### Basic Stats
- **125 completed/100 active engagements in 2016; 30 external preferred coaches**
- **48 trained; 149 engagements**
- **1,000 trained across 47 countries; ~1,700 assignments per year**

### What else
- **3 and 6 month packages**
- **Coaching intranet**
- **Consistent approach, Biweekly sessions, 6-9 months**

**JPC requirements:**
- **Initial certification:** 3 day experiential course, 3 tele-class sessions, one practice client
- **Annual requirements:** 3-4 clients, 3 supervision sessions, 2 continue educ. sessions
# 5 Levels of Measurement

<table>
<thead>
<tr>
<th>Level</th>
<th>Measurement Focus</th>
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<tbody>
<tr>
<td>1 Reaction</td>
<td>Measures participant satisfaction and captures planned actions.</td>
</tr>
<tr>
<td>2 Learning</td>
<td>Measures changes in knowledge, skills, and attitudes.</td>
</tr>
<tr>
<td>3 Implementation</td>
<td>Measures changes in on-the-job behavior or actions.</td>
</tr>
<tr>
<td>4 Business Impact</td>
<td>Measures changes in business impact variables.</td>
</tr>
<tr>
<td>5 Return on Investment</td>
<td>Compares benefits to the costs.</td>
</tr>
</tbody>
</table>

- *Evaluating Training Programs: The Four Levels (3rd Edition)* (Kirkpatrick & Kirkpatrick)
<table>
<thead>
<tr>
<th>Level</th>
<th>Reaction</th>
<th>Impact Survey</th>
<th>Medtronic</th>
<th>Gsk</th>
<th>CoachSource</th>
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<td>✔️️</td>
<td>✔️️</td>
</tr>
<tr>
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<td>✔️️</td>
<td>✔️️</td>
<td>CSAT Survey</td>
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<td>2</td>
<td>Learning</td>
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<td>3</td>
<td>Implementation</td>
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<td>Business Impact</td>
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<td>5</td>
<td>Return on Investment</td>
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</tbody>
</table>
Post Engagement Impact Survey

- Sent to Participant and Manager at completion of engagement
- 15 questions on satisfaction, process, impact, and coach

Impact Survey

5 point scale for Q1-5, 8-13 (Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree):

Q1: Overall, the coaching was a valuable investment
Q2: An accurate assessment (i.e. strengths, development needs etc.) was conducted at the beginning of the coaching process
Q3: A coaching plan was created with meaningful development priorities, goals and actions
Q4: Progress against the coaching plan was monitored and reported
Q5: New skills and behaviors have been applied back on-the-job
Q6: Select those areas positively impacted from the coaching. If you do not believe there has been a positive business impact, skip to question 8.
- Increased revenue
- Increased productivity of self
- Increased productivity of others/teams
- Improved quality
- Reduced costs
- Saved time
- Improved customer service/satisfaction
- Improved employee retention
- Improved working relationships
- Other (please specify)
Q7: Please estimate the bottom-line results achieved by the company due to coaching (i.e. New negotiation skills helped save $1M in a recent contract renewal, or new skills in motivating others helped retain a key direct report saving $250K of replacement costs)
Q8: The coach was knowledgeable of Genetech's/Roche's business and culture
Q9: The coach was well prepared for the coaching sessions
Q10: The coach challenged the participant to try new perspectives, techniques, or behaviors at work
Q11: The coach worked effectively with the participant's manager
Q12: The coach worked effectively with the participant's HR business partner
Q13: I would recommend this coach to others
Q14: What could have been improved in this coaching process? (open text)
Q15: May we share your responses to this survey with the coach? (y/n)
Post-Coaching Survey

- Web based tool

- Survey includes four “rating” questions and one free text
  - Overall, to what extent has your coaching experience been effective?
  - To what extent has your coach been effective?
  - To what extent did you achieve your defined coaching objectives?
  - To what extent has coaching improved your performance in your job?
  - What are the most important benefits you have gained from the coaching experience?

- “Rating” options:
  - To a very great extent
  - To a great extent
  - To a moderate extent
  - To a small extent
  - Not at all

Overall Results for Job Plus Coaching:
- 90% agree their coaching experience was ‘very great extent’ or ‘great extent’
- 95% agree their coach was ‘very great extent’ or ‘great extent’
COACH SATISFACTION SURVEY –

HOW SATISFIED ARE YOU WITH YOUR COACH IN THE FOLLOWING AREAS:

<table>
<thead>
<tr>
<th>Area</th>
<th>Very Dissatisfied</th>
<th>Dissatisfied</th>
<th>Neutral</th>
<th>Satisfied</th>
<th>Very Satisfied</th>
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</thead>
<tbody>
<tr>
<td>Identifies clear priorities for my growth and development</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Genuinely listens to me</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Provides specific, actionable suggestions/advice</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Communicates in a direct and concise manner</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Overall satisfaction with your coaching experience</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

We are conducting a short satisfaction survey on your coaching experience so far. Please be as open and honest as possible.
We will share these results with your coach and your organization in order to continuously improve the quality of our services. If you'd rather speak to us directly, please give us a call at either number below or drop us a note.

Thank you!
Brian Underhill, Ph.D.
Founder
(408) 779-9059 or brian@coach-source.com
Q3 How satisfied are you with your coach in the following areas:

Answered: 1,135  Skipped: 3

- Overall satisfaction with your coaching experience: 4.74
- Communicates in a direct and concise manner: 4.78
- Provides specific, actionable suggestions/advice: 4.71
- Genuinely listens to me: 4.85
- Identifies clear priorities for my growth and development: 4.60
<table>
<thead>
<tr>
<th>Level</th>
<th>Genentech</th>
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<th>gsk</th>
<th>CoachSource</th>
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<tr>
<td>2 Learning</td>
<td></td>
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<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Self assess of participant</td>
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<tr>
<td>3 Implementation</td>
<td></td>
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<td>4 Business Impact</td>
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<tr>
<td>5 Return on Investment</td>
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</tbody>
</table>
Coaching Training Programs

Attendance from 2010 to 2016

- Practical Coaching in the Workplace – 15,000
- Coaching For Effective Leaders – 1,500
- Job Plus Coaching – 1,085

Post Training Surveys

- Application of learnings
  - 99% likely to implement Practical Coaching in the Workplace learning (68% ‘very likely’).
  - 96% likely to implement Coaching for Effective Leadership learning (81% ‘very likely’).
  - 99% likely to implement Job Plus Coaching learning (92% ‘very likely’).
<table>
<thead>
<tr>
<th>Level</th>
<th>1 Reaction</th>
<th>2 Learning</th>
<th>3 Implementation</th>
<th>4 Business Impact</th>
<th>5 Return on Investment</th>
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</thead>
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<tr>
<td></td>
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<td>✔️</td>
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<td>Self assess of</td>
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<td></td>
<td>Participant/Mgr</td>
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<td>Participant / mgr</td>
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<tr>
<td></td>
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</tbody>
</table>
**Post Engagement Impact Survey**

**Impact Survey**

5 point scale for Q1-5: 1-3 (Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree):  
Q1: Overall, the coaching was a valuable investment  
Q2: An accurate assessment (i.e., strengths, development needs, etc.) was conducted at the beginning of the coaching process  
Q3: A coaching plan was created with meaningful development priorities, goals, and actions  
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Q6: Select those areas positively impacted from the coaching. If you do not believe there has been a positive business impact, skip to question 8.  
- Increased revenue  
- Increased productivity of self  
- Increased productivity of others/teams  
- Improved quality  
- Reduced costs  
- Saved time  
- Improved customer service/satisfaction  
- Improved employee retention  
- Improved working relationships  
- Other (please specify)  
Q7: Please estimate the bottom-line results achieved by the company due to coaching (i.e., new negotiation skills helped save $1M in a recent contract renewal, or new skills in motivating others helped retain a key direct report saving $250K of replacement costs)  
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Q14: What could have been improved in this coaching process? (open text)  
Q15: May we share your responses to this survey with the coach? (y/n)
Being a Job Plus Coach makes you a better leader as rated by direct reports

- In this sample of 43 Job Plus Coaches where data is available, Manager Effectiveness improved at a faster rate than the Comparison Group

- With a sample of 43 JPCs, this difference was not statistically significant
2. Since leadership coaching began, has this leader asked for input from you concerning how he/she can improve?
   - Yes
   - No

3. Over the past six months, how often has this leader followed-up with you concerning how he/she could improve?
   - None
   - Little
   - Some
   - Frequently
   - Constantly

4. Overall leadership effectiveness:
   - 3 (Less Effective)
   - 2
   - 1
   - 0 (No Change)
   - 1
   - 2
   - 3 (More Effective)

Do you feel this leader has become more effective (or less effective) as a leader in the past six months?

5. Please rate the extent to which this individual has increased / decreased in effectiveness in the following areas of development during the past six months:

   - 3 (Less Effective)
   - 2
   - 1
   - 0 (No Change)
   - 1
   - 2
   - 3 (More Effective)

   EXAMPLE - Delegating tasks to others in a clear and decisive manner
Aggregated Results

Question: Do you feel this person has become more or less effective as a leader since the feedback session? Answer: “-3: Less Effective” to “+3: More Effective”. Conducted 6 months following original 360.
<table>
<thead>
<tr>
<th>Level</th>
<th>Genentech</th>
<th>Medtronic</th>
<th>GSK</th>
<th>CoachSource</th>
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<tbody>
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### Post Engagement Impact Survey

**Areas positively impacted from the coaching**

<table>
<thead>
<tr>
<th>Area</th>
<th>Rating</th>
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<tbody>
<tr>
<td>Improved relationships w/ key sr...</td>
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<tr>
<td>Improved working relationships</td>
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<tr>
<td>Improved employee retention</td>
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<td>Improved customer service/satisfaction</td>
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<td>Saved time</td>
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<td>Reduced Costs</td>
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<td>Improved quality</td>
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<td>Increased productivity of others/team</td>
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<tr>
<td>Increased productivity of self</td>
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</tr>
</tbody>
</table>

- “Savings of $400k in executive search fees in Q316 due to enhanced relationship with recruitment partners”
- “New motivation skills help retain two Sr. Director-level employees”
- “I estimate the bottom line results were worth more than $500k through the encouragement to apply Lean Thinking to my organization that resulted in a reduction of two contract positions and motivating employees to increase productivity.”

**Impact Survey**

5 point scale for Q1-5, 1-13 (Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree):

1. Overall, the coaching was a valuable investment
2. An accurate assessment (i.e. strengths, developmental needs etc.) was conducted at the beginning of the coaching process
3. A coaching plan was created with meaningful development priorities, goals and actions
4. Progress against the coaching plan was monitored and reported
5. New skills and behaviors have been applied back on-the-job
6. Select those areas positively impacted from the coaching. If you do not believe there has been a positive business impact, skip to question 8.
   - Increased revenue
   - Increased productivity of self
   - Increased productivity of others/team
   - Improved quality
   - Reduced costs
   - Saved time
   - Improved customer service/satisfaction
   - Improved employee retention
   - Improved working relationships
   - Other (please specify)
7. Please estimate the bottom-line results achieved by the company due to coaching (i.e. New negotiation skills helped save $1M in a recent contract renewal; or new skills in motivating others helped retain a key direct report saving $250K of replacement costs)
8. The coach was knowledgeable of Genentech’s/Alliance’s business and culture
9. The coach was well prepared for the coaching sessions
10. The coach challenged the participant to try new perspectives, techniques, or behaviors at work
11. The coach worked effectively with the participant’s manager
12. The coach worked effectively with the participant’s HR business partner
13. I would recommend this coach to others
14. What could have been improved in this coaching process? (open text)
15. May we share your responses to this survey with the coach? (y/n)
INTERNAL COACHING – RIPPLE EFFECT IMPACT FOR ORGANIZATION

“Coaching signaled to me a great investment in my potential and has elevated my engagement even further”
Internal Coaching Client

**ICC Participants** have **higher Engagement Survey Results** than a comparison group of High Potential Leaders

<table>
<thead>
<tr>
<th>Comparison group vs.</th>
<th>ENGAGEMENT</th>
<th>INCLUSION</th>
<th>INNOVATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coaches</td>
<td>+12 pts</td>
<td>+15 pts</td>
<td>+13 pts</td>
</tr>
<tr>
<td>Direct Reports</td>
<td>+16 pts</td>
<td>+13 pts</td>
<td>+15 pts</td>
</tr>
<tr>
<td>ICC Down line</td>
<td>+18 pts</td>
<td>+10 pts</td>
<td>+10 pts</td>
</tr>
</tbody>
</table>

**Coaching Clients** have **higher Engagement Survey Results** than a comparison group of High Potential Leaders

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Clients</td>
<td>+11 pts</td>
<td>+14 pts</td>
<td>+13 pts</td>
</tr>
</tbody>
</table>
Significant increases in all Leadership Expectations attributed to JPC Coaching (Coachee pre and post survey responses)

- Additionally, significant increases were reported in key leadership areas:
  - giving feedback and having challenging conversations +19%,
  - confidence in effectiveness as a leader +19%,
  - self confidence +16%,
  - awareness of the impact on others +15%
<table>
<thead>
<tr>
<th>Level</th>
<th>1 Reaction</th>
<th>2 Learning</th>
<th>3 Implementation</th>
<th>4 Business Impact</th>
<th>5 Return on Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✔️ Impact Survey Participant/Mgr</td>
<td>✔️ Impact Survey Participant/Mgr</td>
<td>✔️ Impact Survey Participant/Mgr</td>
<td>✔️ Impact Survey Participant/Mgr</td>
<td>✔️ Value of Coaching</td>
</tr>
<tr>
<td></td>
<td>✔️ CSAT Survey</td>
<td>✔️ ✔️ Self assess of participant</td>
<td>✔️ ✔️ Participant / mgr survey</td>
<td>✔️ ✔️ Line mgr observation</td>
<td>✔️ Value Capture of internal v external cost</td>
</tr>
<tr>
<td></td>
<td>✔️ ✔️</td>
<td>✔️ ✔️</td>
<td>✔️ ✔️</td>
<td>✔️ ✔️</td>
<td>✔️ ✔️ Self funded internal department, fee for service</td>
</tr>
<tr>
<td></td>
<td>✔️ ✔️</td>
<td>✔️ ✔️</td>
<td>✔️ ✔️</td>
<td>✔️ ✔️</td>
<td>Lisa Edwards ROI</td>
</tr>
</tbody>
</table>

[24]
Evolution of Measuring Coaching

Annectodal (2008)
- Testimonials from leaders coached and managers

Impact Analysis (2009)
- Estimation of impact based on performance ratings, promotions, and retention of those coached

Impact Survey (2010-Present)
- Post-engagement surveys to leaders coached and manager to collect level 1-4 data

Value of Coaching (2016)
- Research by People Analytics Group to show value of coaching defined by compensation
Value of Executive Coaching at Genentech

Our analysis shows that leaders who are coached have an increase in annual compensation of ~ $38,000 more than those not coached

- Annual compensation (salary + bonus) selected as key metric because it is a single measure that includes promotions (reflected in increased salary) and performance (reflected in bonus)
- Analysis includes 155 employees coached from 2012-2016 and 4,421 comparison employees
- Coaching simulated for comparison employees to estimate the effect of coaching
- Effect of coaching on annual salary was further estimated using linear models
- Limitations in data include short-4 year window and potential selection bias of those receiving coaching
INTERNAL COACHING RIPPLE EFFECT
VALUE CAPTURE

Direct Costs to train 1 Coach
(Program Fees, Travel*)

Direct Benefits from 1 Coach
During Certification: min. 2 Client Engagements
Post Certification: min. 4 Client Engagements

- TRAVEL COSTS
- PROGRAM COST
- INTERNAL COACH
- ADDITIONAL VALUE CAPTURE
- CORE VALUE CAPTURE
- TRAVEL COSTS RECOVERED
- PROGRAM COSTS RECOVERED

ADDITIONAL CLIENTS
3 CLIENTS
1 CLIENT
2 CLIENTS

Year 1
Year 2
Year 2 +
ROI: Try It!

ROI = \frac{\text{Benefits} - \text{Cost}}{\text{Cost}} \times 100

ROI = \frac{$750,000 - $425,000}{\$425,000} \times 100 = 76\%
INTERNAL COACHING – RIPPLE EFFECT
EXAMPLES OF CLIENT RESULTS

1. **91% Satisfaction Rating** based on Extent to which Coaching has a positive impact on Career Development, Performance Effectiveness and Engagement.

2. In person, meeting conducted three times per Engagement with Coach, Client and Manager; results reflected in Level 3 & 4 metrics tracked via a post engagement survey.

3. 100% of Client /80% of Managers indicate **improved proficiency in Leadership Expectations**.

4. 100% of Clients indicate an increased Intent to Stay*.
   90% of Clients and 81% of Managers reported **increased ability to deliver results through others**.

5. 80% less than cost of external engagement.

*Post Program Survey in which Clients and Managers are asked if improvements were due to the Coaching Engagement.
### Level 1: Reaction
Measures participant satisfaction and captures planned actions.

### Level 2: Learning
Measures changes in knowledge, skills, and attitudes.

### Level 3: Implementation
Measures changes in on-the-job behavior or actions.

### Level 4: Business Impact
Measures changes in business impact variables.

### Level 5: Return on Investment
Compares benefits to the costs.

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*Evaluating Training Programs: The Four Levels (3rd Edition) (Kirkpatrick & Kirkpatrick)*

[30]
• Yes, You Can (and MUST) Measure the Results of Executive Coaching!

Chris Pollino  
Executive Talent Development Enterprise Coaching Practice Leader  
Genentech

Karen Mathre, PCC  
Medtronic

Patrick Murphy, ACC, CPC  
Director of Coaching  
GSK

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Founder & CEO  
CoachSource, LLC

Twitter: @bunderhill  
LinkedIn: linkedin.com/in/coachsource
Back Up
About Genentech

- Founded in 1976
- Became a member of the Roche Group in March 2009
- Headquartered in South San Francisco, California
- Approximately 15,000 employees
- Headquarters for all Roche pharmaceutical operations in the U.S.
  - 35 medicines approved for people with various serious or life-threatening diseases
  - US Pharmaceutical 2016 sales: almost $19 Billion
  - Genentech’s Research and Early Development group (gRED) has more than 30 potential new medicines in development
Coaching Services

Individual Coaching
One to one, Coach and Client work together on the Client’s personal objectives
Categories:
• Executive Coaching
• Professional Coaching
• Job Plus Coaching

Group Coaching
Group Coach works with up to eight individuals who have something in common or face similar challenges. The individuals are independent of each other but have shared issues, concerns or circumstances and can learn from each other.

Team Coaching
Team Coach works with a team who are united by having a common purpose, and who need to work together to achieve team goals and objectives. The team members are interdependent with each other and the Team Leader.
Building Coaching Capability

Practical Coaching in the Workplace
1 day course that builds awareness in Coaching, develops leaders' confidence and basic competence to enable to use a Coaching approach in the way they lead.

Coaching for Effective Leaders: Leading with Head, Heart & Guts
2 day experiential course enabling leaders to be the best they can be. It builds the coaching approach and develops greater self awareness which leads to greater team engagement, to having real conversations and drives high performance.

Job Plus Coaching Training: Becoming an Internal Coach
3 day experiential course training internal Coaches. It deepens Coaching competencies, focuses on Coaching attitude and introduces psychological frameworks. Graduates coach clients across GSK.

Tailored initiatives to meet organisational needs
Global – bespoke – in partnership with Talent Leadership & Organisation Development and business need: Accelerating Difference (diversity), Accelerating Transitions (change)

For all staff developing leadership skills
For all GSK Leaders
For those who want to be a Coach in GSK