

A Case Study: Broad Insights
A Survey of Business Coaching Impacts
on Companies and Their Leaders

by

James G. Wiginton, III

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PSB: Paris School of Business
Paris, FRANCE

Supervisor: Dr. Phillip Cartwright, Ph.D.
Professor of Economics, PSB

Dr. Sylvaine Castellano, Ph.D.
Professor, Head of Research, PSB

Dr. Josse Roussel, Ph.D., DR H.D.R.
Dean of the Executive DBA, PSB

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Table of Contents

Abstract	4
Acknowledgements	5
CHAPTER I: Introduction	6
The research questions	6
Statement of questions	6
Importance of research in business coaching	9
Definitions and related issues	11
Definition of business coaching	11
Issues surrounding business coaching focus	12
Case study justification and clarifications	19
Defining success	20
Typical measured outcomes for business leaders	22
Targeted results from this study	25
CHAPTER II: Literature Review	27
Business coaching definitions	27
Outcomes from business coaching	31

CHAPTER III : Methodology	39
Questionnaire design	39
Response rate	44
Reliability and validity	44
CHAPTER IV: Findings and Analysis	45
Question by question detailed results	47
CHAPTER V: Conclusion and Recommendations	60
CHAPTER VI: References	63
Appendices	68
Client Testimonials	68
Survey questions	74
Survey responses	76
Case studies	91
Statistics regarding response rates	94
NPS (net promoter score) benchmarks	95
List of respondents	96
Reponses to questions about magnitude of changes for six major areas	99

Abstract

Broad Insights, a U.S.-based global business coaching firm with cumulative sales of over \$3M, conducted a survey of its entire client base since its inception in 2012 to determine the impact and benefit its clients perceived as a direct result of the coaching process. In order to assess the benefits, this study posed several research questions to those clients via an anonymous, electronic survey. The research questions were asked because although business coaching is a fast-growing discipline, there have been relatively few studies performed that indicate its true measurable value as determined by the recipients of the coaching.

The existing business coaching literature suggests six primary benefits of business coaching; accordingly, these factors are the variables analyzed in this paper. Three of the factors are internal to the “coachee”: leadership effectiveness, strategic clarity, and short-term decision making. The other three are external to the client: customer satisfaction, employee engagement, and financial results.

To test the efficacy of these variables in a specific business setting, additional relevant questions were posed by means of surveys and interviews: (1) do the surveyed clients believe the investment in coaching brings a positive return, and (2) how likely would the Broad Insights’ clients be to recommend coaching?

For five of the six factors, the findings indicated that coaching provided more than minimal progress, and both other questions on return on Investment and willingness to recommend yielded statistically significant positive results at the 99% confidence level. Such statistical metrics demonstrate that Broad Insights’ business coaching produced measurable progress in “coachees” on both individual and organizational levels.

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I am grateful for the opportunities to have coached many business leaders over the past few years. What an incredible way to spend a life!

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In all stages of the process, I have prayed for wisdom in dealing with complex and tense situations that have involved very emotionally-charged people. I thank my God and Savior Jesus Christ for the wisdom He has provided according to His promises in the Bible.

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I am also thankful for my business partners, coaches, and clients of Broad Insights who share the vision for using business coaching as a means of truly impacting the lives of leaders and in ensuring they have competent and caring sounding boards. Thank you all for what you are doing to make a difference. It is happening.

Clay Wiginton has continually been an encouragement and a challenger to finish this project. I am thankful for his impact on me and the Broad Insights' mission. Thanks, son.

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My wife and I are thankful for our children who are such an important part of our lives. You are all influencers. Thank you for listening to us and aspiring to make your lives meaningful and impactful. Thank you for supporting me as I have continually sought to reach new goals. May you continue to trust the Lord and dedicate your lives to His glory. We love you more than you can realize until you become parents, DV.

Chapter I: Introduction

What is business coaching, and is such coaching worth the considerable investment of time and resources it implies to the business leaders it proposes to serve? On the topic of business coaching and its actual, measurable impact on an organization's progress, two themes emerge. First, business coaching is an ill-defined and evolving discipline and its impacts on an organization are often not objectively measured. Second, the fact that the discipline is not consistently defined has allowed the coach, "coachee," or other interested stakeholders to make untestable declarations of success or non-success. Such subjective views, not some objective standard, have been the determining verdict on many engagements. As a result, efforts to quantify the business coaching discipline's impact have been difficult, if not impossible.

The research questions

The research was based on a series of five research questions, which were asked of (N = 87) clients of Broad Insights' business coaching. Of these five questions, three yielded statistical results, while two did not. Overall, the results demonstrated a positive correlation between business coaching with entrepreneurial and personal success.

The following three questions yielded statistically significant results:

1. What is the impact of business coaching on leaders and their companies?

The first question will be addressed by a survey. The null hypothesis is that coaching has no or minimal impact on leaders and their companies. On the other hand, the alternative hypothesis

posits that coaching has a significant positive impact on leaders and their companies.

This research will focus on whether or not there is a statistically significant impact on company results, as measured by a survey of the recipients of coaching (such individuals will henceforth be referred to by the term “coachee”) of the U.S.-based firm Broad Insights.

Based upon a review of the literature, such survey results fall into two categories: personal growth and business results. The three variables of the personal category surveyed are: leadership effectiveness, strategic clarity, and short-term decision making. Regarding business results, the survey asks about another three variables: employee engagement, customer satisfaction, and financial results.

It is important to note that any results indicating only a minimal improvement (as gauged by the coachees) should not be considered as a positive result, as one could argue that some progress would be made based upon experience and time alone. For this reason, the null hypothesis will be that coaching makes *no more than* a minimal impact on leaders and their organizations progress. Alternatively, the hypothesis that we will attempt to prove is that coaching has *more than* minimal positive impact on the coachee in the surveyed areas.

2. What is the return received from business coaching compared to its cost? i.e. What is the perceived return on investment (ROI)?

The second question will be addressed via a survey. The null hypothesis is that coaching has not proven to be a good investment for leaders and their companies versus the alternative hypothesis that the cost of coaching is seen as worth the associated investment.

An additional survey question allowed the respondents to evaluate whether the expense associated with coaching was a positive, breakeven or negative investment as evaluated by the Broad Insights' coaching clients.

3. How do coached leaders perceive the value of coaching as indicated by their willingness to recommend coaching to others?

The third question will be addressed via a survey of (N = 87) clients of Broad Insights' business coaching. The null hypothesis is that coaching has not proven to be worth recommending to others versus the alternative hypothesis that the value of coaching is worthy of recommendations to others.

This third research question is based upon the Net Promoter Score (NPS) concept (Reichheld, 2003). The NPS is the result of a survey question asking, on a scale of 1 to 10, what is the likelihood that the respondent will recommend coaching to others. If the respondent chooses 9 or 10, they are considered a "promoter", if their answer is 7 or 8 they are deemed to be a "passive", if their score is 6 or below, they are known as a "detractor". The NPS is the result of taking the number of promoters less the number of detractors, while ignoring the passives. The null hypothesis is that Broad Insights coaching has not proven to be sufficiently beneficial, which would result in a negative NPS. The alternative hypothesis is that BI coaching correlated with a positive NPS, and leading to the conclusion that there were more promoters than detractors in the representative test sample. This would indicate that there are significant numbers of clients who are promoters of Broad Insights coaching and are, therefore, convinced

of its value.

Two other questions were also posed to the Broad Insights' client base: (1) how long have you been coached, and (2) and who was/is your coach? For these two questions, there was no statistically significant difference in the results of the surveyed populations. For the question of longevity, the results revealed no significant variation; whereas the question of who was the coach could not be considered significant because the sample size (N=18) was too small for most of the coaches who were listed as survey choices.

The Importance of Research In Business Coaching

Business coaching is an expanding, global practice, but it is also little-regulated and rarely certified. Further, the title "business coach" does not require licensure, is ill-defined and varies based upon the practitioner and his or her background. Despite such uncertainties and lack of quality control, business coaching often requires significant investment by the client. This creates an environment of skepticism based on the risk of ineffective practitioners and inconsistent results in the practice of business coaching.

Potential clients hesitate to commit to a process that is little known, often challenging to understand, and offering benefits that are difficult to quantify. Imagine someone hiring a financial advisor, doctor or an attorney without the benefit of knowing any information regarding their experience with similar clients, their licensure, their background, and their likelihood of genuinely helping the client!

For the sake of the practice and (more importantly) its clients, these following fundamental questions are important for any business coach to answer: Are the results from coaching quantifiably superior than what the coachee and his / her organization would have experienced naturally? To put the question more bluntly: is the coaching investment worthwhile, or is it merely a sham? Will this business coaching trend eventually be perceived as another fad, a trendy buzzword that will ultimately be proven to be a poor use of resources and a relative waste of time?

As a case study within the coaching discipline, Broad Insights' current entire client base was surveyed to get a statistical analysis of the impact of coaching. Are the clients who have experienced Broad Insights' coaching, in general, promoters of the experience? What can we learn from their feedback that may provide a representative picture of coaching effectiveness?

The discipline of business coaching is understandably under pressure because of its need to quantifiably demonstrate that such coaching merits consideration. Clients need information that provides demonstrable assurances that the decision to hire a business coaching firm is a reasonable risk for the potential client and his or her company. Business owners must prioritize competing investment choices, since they frequently have fewer resources than they have options.

This study provides quantifiable data based upon an anonymous survey of eighty-seven recipients of Broad Insights coaching to answer those fundamental questions. Fifty-two

responded within the time parameters of the study. From this research, conclusions can be drawn about the effectiveness and appropriateness of a coaching investment. Clearly, these conclusions are for a single company but, if a coaching company has similarly qualified and adept coaches, a potential coachee can have more confidence in the decision to hire a coach.

Of course, any comparison between Broad Insights and any other coaching outfit must be based on organizations of similar quality and recruiting rigor. Each member of the Broad Insights' team of coaches is carefully vetted prior to joining the team. If another coaching organization does not properly vet its coaches or if its coaching training and development is inferior, the results may be significantly different.

Definitions and related issues

Definition of Business Coaching

The term “coach” in its first usage in the English language, referred to a type of carriage that took someone from where they were to where they wanted to go. Thus, coaching has always conveyed the meaning of carrying someone to a different destination. Likewise, one of the fundamental concepts of business coaching includes the idea of carrying someone to a different level of thinking. Challenging them to see the world, themselves and their situation in a new light is one of the great benefits and challenges for coaches and coachees. Among other descriptors, coaching has been described as a process, a system, a methodology and even an art form.

Issues surrounding business coaching focus

Business coaching, which emerged as a named discipline in the latter part of the 20th century and has continued to grow in popularity ever since, is often a highly personalized approach to taking someone further in leadership and business. The business coaching process involves a decision maker (i.e. the business leader) determining the need for outside advice in order to receive information from an individual who is perceived to have insights that cannot be provided by the decision maker's existing network of advisors. Business coaches come from many different disciplines (psychology, business, etc.) and therefore bring unique experience and training to the engagement.

Business coaching and executive coaching, oftentimes used synonymously, will be treated jointly in this paper due to the significant overlap between the fields. The distinction that the targeted company, Broad Insights, makes is that *business coaching* involves an owner or closely related decision maker (typically of a small to medium company) of an organization, whereas *executive coaching* typically refers to the executive or senior management team of a larger organization in which the recipients of the coaching typically are not equity partners within the firm. This distinction is not often specified in the literature, but is noteworthy since business coaching includes a larger array of business results beyond the typical coaching of interpersonal and other "soft" skills. As much as is appropriate, the paper will use the two terms interchangeably, since the differences are not often noted. However, there is clearly a difference in the mindset of a coachee when he or she is an owner of the business.

Not always is the decision to hire a business coach dependent on specific issues that need to be addressed. Sometimes, the desire for coaching emerges out of a general sense of the need to get different input into business and personal issues that are confronting or will confront the leader. The help desired is often non-specific and non-technical. The reason someone hires a coach (as opposed to a full-time employee) is a question of affordability or intensity of need or both. Whenever someone hires a non-technical advisor (as opposed to a CPA or tax attorney), the relationship varies based upon a vast number of dynamics.

For example, if the business leader is currently in a personal crisis, the coaching may not need to touch the business at all (or very little), and may focus entirely on the leader's personal challenges. The value of an advisor who is perceived to be trustworthy, experienced and maintains confidences can easily and incorrectly be underestimated by evaluations of business coaching. When access to the advisor is a routine, paid-for occurrence, the situation provides opportunity for a growing relationship. In the developing relationship, a range of subjects are typically discussed—even if they do not relate directly to the business! Therefore, absent a defined coaching process (and sometimes with one), the content of coaching sessions is as varied as the people who are coached.

Below, for example, is a chart (Chart 1) from the January, 2009 *Harvard Business Review* that depicts the difference between the stated reason to hire a coach and the actual content of the engagement. Although there might not typically be the belief that personal coaching is economically justifiable, in fact, the sessions often include personal matters as the

relationship is typically intensely intimate.

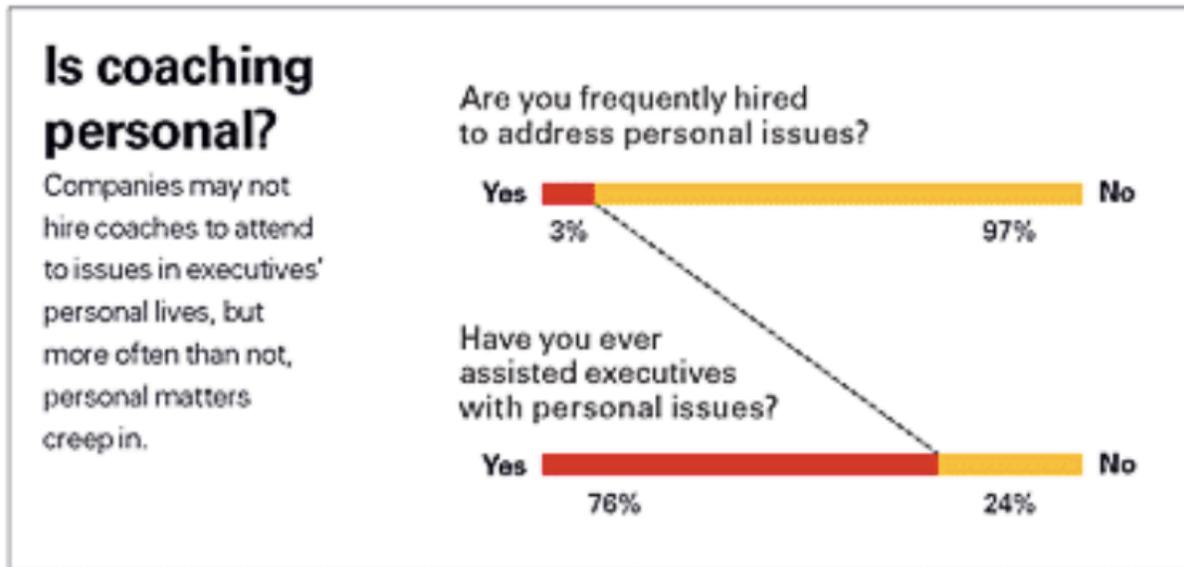


Fig. 1 Is Coaching Personal? Source: Coutu, D., & Kauffman, C. (2009, January) Harvard Business Review (p.3)

The closeness of the relationship is often understandably overlooked in the literature. When humans communicate about matters that are meaningful, deeper relationships often result. Frequently, coaches become valued friends to business leaders; therefore, the content of the discussions may evolve from a fact-based, action focused, process-driven approach to a more vague and comprehensive style. That evolution is not always healthy for the business. Of course, the relationship will only continue if both parties believe it is beneficial, so a coaching relationship that evolves to friendship without perceived benefit to the business owner will tend to be terminated unless the disproportionate situation is corrected.

A business coach must be careful about seeking a perceived friendship status, however, as it is the professional and ethical duty of the coach to continue to provide candid and

sometimes hurtful feedback. Effective coaches are not always popular with their clients when required to point out failures, blind spots and missteps. However, coaches who seek only to please their clients with complimentary and fawning words will prove relatively ineffective in developing and serving their clients.

Other reasons why business coaching defies easy definition include variability in the business context. If a business is growing, for example, the focus may be upon hiring, promoting, or moving people to accommodate the growth while developing new, more robust processes to handle the increased business. Another example of business coaching variability is driven by business urgencies. Interpersonal conflicts among employees, employee or customer complaints, quality concerns or manufacturing shortcomings can all change the focus of the coaching content.

Notably, the coaching definition is vague because coaching is not a set behavior! The people who coach business leaders bring a variety of backgrounds to the coaching relationship. A coach who has spent his or her career in Human Resources (HR) will likely see more issues that are HR-related. That coach is naturally more experienced in those areas and is more comfortable in resolving those issues and in enhancing the firms' performance within the specific area of his or her expertise. In the above example, those issues that become evident to a coach who is an HR professional may be missed, or at least minimized, by a coach with another background.

Other coaches reason not from a business perspective, but from a social sciences perspective since their education and experience lend themselves to interpersonal and intrapersonal issues. The same reasoning would lead us to suspect that coaches with financial backgrounds would also focus on their strengths and, as a result, tend to see problems through a financial lens.

Figure 2 (below) was developed by the Professional Business Coaches Alliance, a North-American based coaching organization. This diagram attempts to depict how business coaching intersects personal and business effectiveness and, therefore, is involved in developing the coachee in both realms.

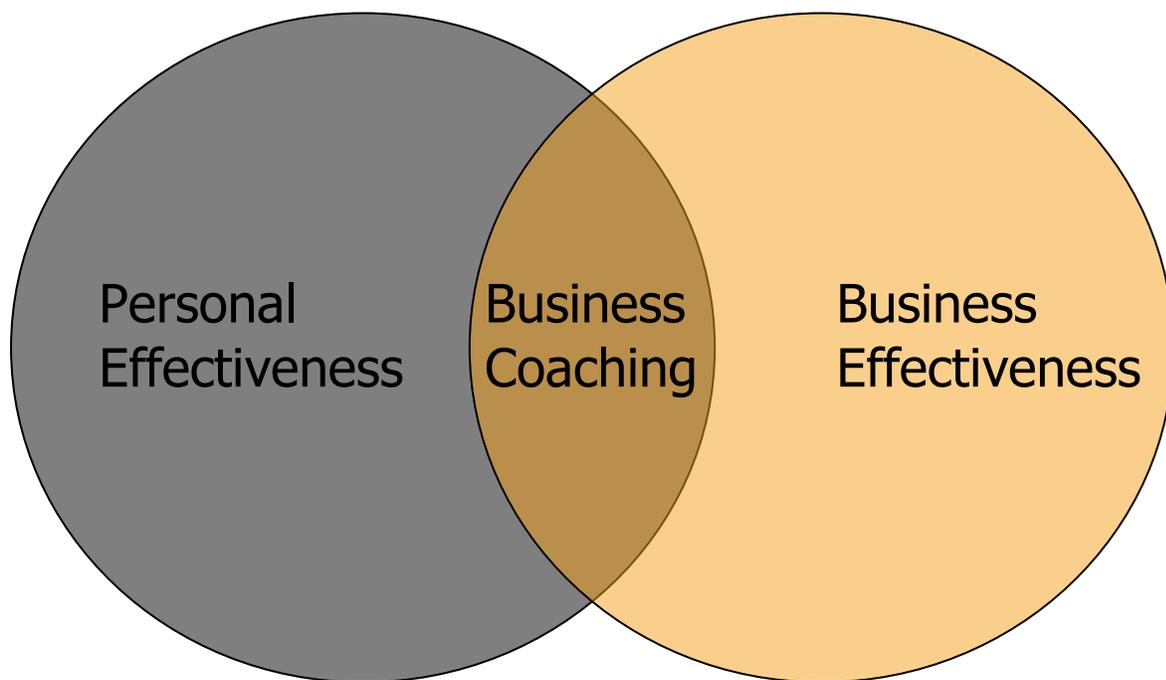


Fig. 2 Source:

PBCA

The following table presents typical (but non-exhaustive) issues in the two areas:

Personal Effectiveness Issues

Leadership
Communication
Interpersonal Skills
Time Management
Goal Setting
Action Plans

Business Effectiveness Issues

Marketing
Sales
Customer Service
Human Resources
Financial Management
Systemization of Processes

Even though all perspectives coming from an experienced, competent coach can be assumed valuable and valued, the background of the coaches may dictate or at least distort their definition of coaching. Additionally, their clients also have experienced coaching only from the coaches they have engaged. This leads to a similar difficulty in defining coaching when asking clients – they have an embedded bias based upon their own individual, limited experiences.

Based upon Broad Insights' more than 10,000 hours of business coaching, our appreciation of the different perspectives and our review of the literature, I propose the following definition of business coaching that, I believe, accurately and comprehensively describes the discipline:

Business coaching is the art of providing appropriate diagnosis and guidance to an organization and/or its leader(s) by an experienced, trusted advisor who actively contributes to developing situational clarity, specific action steps, and accountability for measurable results within an environment that is confidential, candid, wisely-cadenced and progress-focused for the benefit of the client individually and the business as a whole.

Upon close analysis of this admittedly long definition, several elements appear critical. The statement begins with the description of coaching as an art form. Excellent business coaching involves reading each situation in the context of its own unique set of characters, situations and challenges, and recognizes that a standard, templated solution is rarely optimal. Additionally, the power of proper, open-ended, strategic questioning differentiates the best coaches from the others. The art of the question is absolutely the bedrock of great and effective business coaching. The prudent and skillful use of silence emerges as an undeniable art form as well.

Diagnosis followed by guidance is the proper sequence, but both are critical. Many coaching and consulting organizations “rush to their deaths” as they make well-meaning but inadequate attempts to offer solutions before fully understanding the context, history, challenges, and personalities of the coachee’s situation. Guidance is not telling the client how to fix issues or seize opportunity; nor should coaching be confused with simple opinionating. On the other hand, coaching should never be confused with passivity, either. Some coaching organizations imply that the answers are always within the client and any attempt to project the coach’s solutions are somehow inappropriate. How absurd! Why hire an experienced coach and not benefit from his or her experiences? Of course, two of the most powerful tools at the coach’s disposal are questions and silence. These tools must be employed, and they should not be minimized; they represent the default starting point for the coach and should be continually improved upon—but they should not be used exclusively. The balanced approach of thorough diagnosis followed by appropriate, measured guidance is implied in the above definition.

Additionally, the beneficiaries of business coaching can be either an entire organization (viewed holistically) or an individual business leader. Often, coaching focuses on the individual without regard to the overall business result. Best practices in business coaching influence both aspects.

Case study justification and clarifications

This study is based upon the surveyed results from a U.S. based coaching company, Broad Insights, which was founded in 2012. Broad Insights was founded on the premise that coaches need to be mentally agile and have a breadth of experience across the spectrum of *broad* challenges that a client may face. In order to be effective, these coaches, must provide independent *insights* whenever the need arises. Each coaching intervention may lead to various topics, which may not have been previously addressed or even intimated. Although Broad Insights may invite subject matter experts (legal, human resources, business brokers, etc.) into the relationship as needed, the coach remains the primary contact for the client.

Importantly, bringing in specialists should not be construed as a failure on the part of the coaching relationship; rather, the external assistance reflects a professional commitment to ensure that the client receives the best counsel possible. It is naïve to believe that any one coach or team of coaches could possess expertise across the full spectrum of business challenges. Nevertheless, Broad Insights attempts to be as far-reaching in its expertise as plausible. Since Broad Insights' business coaching is comprehensive and, therefore, covers a spectrum of business issues, its client base has received coaching in both the interpersonal and business results categories. Their customer base (with fifty-two clients responding to the survey) provides

a statistically significant population of coachees, and includes clients whose coaching experience has been varied, as well as companies spanning multiple industries. Additionally, those clients surveyed ranged from the owners and CEOs of their respective companies to supervisors and managers within the companies surveyed. This context allows for a variety of questions and topics to be surveyed with the benefit of getting differing perspectives from clients with diverse positions and challenges.

Of course, Broad Insights would also profit from concrete evidence that its coaching is yielding results. The company plans on using the information gleaned as a means for promoting its services elsewhere and convincing others of the viability of business coaching. Most potential clients are asking the same question: Are these coaching sessions effective in their ability to satisfactorily progress the leader and his or her business? Additionally, what are the results that should be analyzed to evaluate successful coaching?

Defining success

As business leaders and owners, one of the key questions asked about any financial choice is: Does the return expected equal the investment required? The same question should be asked of any investment in coaching. However, there appears to be little evidence that significant numbers of studies have been done with the specific goal of measuring coaching ROI. Given the typical small and medium-sized enterprise leader's desire to control costs and ensure that profit is maximized, the failure to measure ROI is surprising. Many business leaders nevertheless persist in seeking coaching because they feel alone in their capacities as decision

makers; they appreciate such subjective benefits of coaching as the ability to talk freely to an invested and knowledgeable stakeholder who empathizes with the challenges a leader faces. Although this impulse is understandable, the business coach really should offer measurable, objective results extending beyond the subjective benefit of empathy.

Often, the literature discusses the intangible, subjective benefits of coaching and ignores the more tangible and quantifiable benefits that relate to coaching. Of course, this paucity of objective research is understandable, given the difficulty in quantifying the isolated benefits of coaching. It can be difficult to determine if coaching is catalytic in any given person's or business's progress. Did the instatement of a coaching program promote business growth, or was the expansion simply coincidental? More than likely, the reasons for the company growth (or decline) were driven by a multitude of factors, including market effects, competitor actions, personnel changes, business focus and leadership effectiveness. This study concludes that the optimal method of measuring results is to ask the recipients directly – after all, coachees best know how to resolve these complex dynamics.

Coaching, if truly valuable, should be able to withstand scrutiny as to its ROI. Of course, not all benefits are legitimately non-quantifiable. Benefits such as leadership confidence, empathy, self-awareness, re-ignited passion for the business, and so on, cannot be quantified; they can only be reported as observed or subjectively assessed. When a client or one of his observers senses progress, that subjective evaluation should not be dismissed. The subject of this research will focus on the surveyed benefits, but that does not imply that the other intangible benefits are non-existent or inferior to the measurable benefits that we will target.

Typical measured outcomes for business leaders

This study has characterized the outcomes into two major categories: one category that revolves around measurable business outcomes and a second group that deals with leaders' personal effectiveness and development.

Typically, for most businesses, the three major outcomes that meet the criteria of measurability and significance are customer satisfaction, employee engagement and company financial results. These three areas form the most frequent focus areas for business coaches. The first three can be measured objectively, and therefore, would provide excellent tests for the effectiveness of business coaching. If a company can measure, manage and continuously improve its relationships with its customers and its employees, it is certainly focused on two of the key elements of its success. Additionally, the entire business must be financially responsible and vigilant for it to be profitable and sustainable. Of course, other areas, including initiatives as broad as innovation, are discussed in the literature but ultimately lead to one of the aforementioned results.

In the case of customer satisfaction, the number of indicators available are widely known. One of the simplest yet comprehensive measures is the Net Promoter Score (NPS) that essentially asks the current base whether they would recommend (promote) the company to others (Reichheld, 2003). After eliminating those respondents considered to be neutral or "passives" according to Reichheld's methodology, the satisfaction score is based upon the net of those who would enthusiastically support ("promoters") minus those who are not enthusiastic

about recommending the company to others (“detractors”). The result is an NPS that provides an overall score that can be compared with other companies. In addition – and just as importantly in the case of business coaching—the resulting NPS can be compared with a company’s own results over time.

To measure accurately the effects of business coaching based on a coaching organization’s customer satisfaction, it is advisable to eliminate other variables that might impact the satisfaction score by directly asking the question of the coachee in order to obtain the open-ended, unbiased feedback regarding the impact of coaching on customer satisfaction.

Critically, whenever a company wants to see progress, it is important to measure the company’s beginning (or baseline) state. Often, Broad Insights’ coaches perform an assessment early in the coaching engagement because the baseline not only enables diagnosis, but also serves as a starting point for measuring the customer’s future level of satisfaction. With that benchmark in mind, the client and the coach can make changes and periodically repeat the same assessment to correlate actions to progress.

In the same way, changes in the other two key areas-- employee engagement and financial results-- are also the result of multiple factors on which coaching may have direct impacts that are difficult to measure. For that reason, we have chosen a survey approach that asks questions of the coachee directly -- attempting to remove interference from bias and immeasurable impacts from other actions not within the scope of this study.

Employee engagement is typically measured through employee surveys that ask standard

questions involving an employee's perception of his or her excitement at work, how socially involved he or she is with fellow employees, and so on. The positive correlation between higher employee engagement and better company financial results has been the subject of many studies. As company leaders become more interested in their employees' engagement, they typically take a snapshot (often via surveys) of their engagement level, then make changes based upon the results. Finally, they reassess the engagement changes based upon an identical survey. Wise coaches help the leaders of the coached organizations create a survey that is benchmarked because such surveys can simultaneously measure the company's results versus other organizations, as well as allow for self-comparisons over time.

Ironically, because the number of measurements of financial success is so numerous, financial success is much more difficult to measure. Profitability, return on assets employed, sales growth over time, sell-ability value, market share, to name only a few, are all legitimate means by which business owners measure financial success. Of course, depending on the life cycle of the company and its current priorities, each of these measures (and others) legitimately may take a more visible place in order to keep leadership focus properly directed during a particular point in time.

An effort to provide a comprehensive ratio was produced by DuPont and captures both Return (profitability) on Assets (ROA) as well as the percentage of those assets that are financed by equity as opposed to debt (Dupont, 1912). This distinction allows a calculation of Return on Equity (ROE), which is the amount of profitability generated as compared to the total shareholder (owner) investment.

The Du Pont formula breaks down Return on Equity into three distinct elements: Profitability (operating efficiency), ROA (asset use efficiency), and financial leverage, which is the amount of external debt used to finance the business. The greater the debt used compared to owner's equity, the greater the financial leverage (Dupont, 1912). This analysis enables the user to understand a company's return by comparison with other companies.

When it comes to business coaching, much of the typical coach's effort involves education on financial concepts, reports and metrics. Additionally, an effective coach will attempt to ensure that the coachee understands the most impactful actions that will result in improved financial results. Often, a coach will help the business leader focus on the few most impactful metrics to address. One of the pitfalls that business leaders frequently fall victim to is trying to fix all issues at the same time. A wise approach is to catalog the challenges, target the ones most in need of attention, capture a quantifiable outcome and create a comprehensive metric to track progress. In this way, the challenges become targeted and manageable. As time passes, additional metrics are introduced on a scorecard system. This makes the coordination of an otherwise complex web of issues much more manageable.

What results of business coaching will this study target?

In addition to the three areas most readily measured and most critical to the success of virtually all organizations-- customer satisfaction, employee engagement and financial results-- the survey included three additional aspects that are subjective in nature. These subjective

categories were designed as summarizations of progress areas often cited in the literature as benefits of coaching.

To that end, leadership effectiveness, strategic clarity and short-term decision making were also among the factors addressed on the survey. Thus, the survey asks the Broad Insights' clients to assess their perception of the progress they and their organizations have made in six areas. Three of those areas are external to the client and assess the outcomes of the client, whereas three of the areas are internal to the client and assess his or her growth as a leader as reflected in his or her leadership approach and decision-making competency.

Much of coaching is based upon the client's perceived view of his or her own increased soft skill levels and is not easily translatable to business results. Although perceived increases in such areas as self-awareness and the ability to interact more effectively are critical and should be the subject of much of business coaching, they do not provide the concrete, objective results that are critical for business coaching to maintain its appropriate strategic role within a company's priorities.

The "soft" areas that we have chosen to include are comprehensive, objectively measurable, and offer a more direct link between behaviors and company results. Many of the objectives that have been studied in the literature seem to be much more difficult to link to the company's improved results.

Chapter II: Literature review

What is business coaching?

According to the ICF (2016a), “coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential” (p.1) Brock (2011) wrote that as the coaching field evolves, the boundaries between fields has become less clear: “coaching, leadership, therapy, organization development, and consulting boundaries are blurring rather than sharpening” (p. 86). Business coaching has typically focused on coaching the individual leader about his or her personal performance. John Dawson defines it this way: “... a development process whereby an individual meets on a regular basis to clarify goals, deal with potential stumbling blocks and improve their performance. It is an intervention that is highly personal and generally involves a one-on-one relationship between coach and client”. Parsloe and Wray (2000, p. 22), describe coaching purposes as: “The aim is to help and support people [to] manage their own learning in order that they may maximize their potential, develop their skills, improve their performance and enable them to become the person they want to be.”

Yet another perspective comes from Gallwey (2000) who states that “coaching can be defined as the facilitation of mobility. It is the art of creating an environment, through conversation and a way of being, that facilitates the process by which a person can move toward desired goals in a fulfilling manner.” (p. 176) Whitmore says that “coaching is unlocking people’s potential to maximize their own performance. It is helping them to learn rather than

teaching them. After all, how did you learn to walk? Did your mother instruct you? We all have a built-in, natural learning capability that is actually disrupted by instruction.” Whitmore (2002, p. 10) He goes on to emphasize “unlocking potential”, “maximizing performance”, “learning (the coachee)” vs. “teaching (the coach)”, and purports that “we (human beings)” have an “innate” learning “capability”. Diane Sanders says that coaches are trained to hold a mirror up to their clients, presumably because the client can easily forget the truth and others may refuse to candidly provide feedback, especially to leaders, since their livelihood could be jeopardized if they do so.

King and Eaton describe coaching as a guided journey that requires knowing your current location, your destination and the possible routes while being accompanied by someone who has already taken a similar trip. Ingleton (2013) underscores that fact that coaching is more about questioning and problem-solving than providing ready-made solutions.

Socratic questioning, a method which allows the coach via open-ended questions to help the coachee promote deeper reflection, is a key component of effective coaching. This methodology requires skillful effort on the part of the coach to maximize its impact on the coachee’s development of new skills, behavior, and solutions (Neenan, 2008).

A Ria Parppei study suggested that business coaching develops what Parppei referred to as self-regulation in raising the coachee’s self-awareness, self-observation, and self-reflection. The study found that the coaching process in effect modeled behaviors relating to goal setting and motivation which were then assumed and imbibed by the coachee. Coaching, therefore, is

believed to instill abilities which the clients should continue between and after the coaching interventions.

Research across a wide range of individuals who have received coaching shows that, on average, the extent of an individual’s true potential that is actually released in the workplace is about 40 percent. This means that many individuals could improve their performance by up to 60 percent. “While coaching has been immeasurably enriched by the injection [of] new ideas and techniques, it has led to increased confusion about the precise nature of coaching and what it is designed to achieve. Consequently, coaching has become increasingly difficult to define” (Stober and Grant, 2006).

In the *International Journal of Evidence Based Coaching and Mentoring*, Sue Smith made this insightful comment when discussing clients’ inability to distinguish between coaching, counseling, and mentoring: “practicing coaches haven’t an ‘agreed’ working definition and given the variety of practices in the marketplace it is little wonder if the recipients of coaching are confused over what activities fall under the title of coaching.” (2017, p. 75)

Writing in *Harvard Business Review* article, Couto and Kauffman compared business coaching with consulting and therapy in the diagram (Figure 3) above. Their article obviously points to the fact that coaching is somewhere between and overlaps each of those two disciplines. This apparent ambiguity does make it difficult to discern the differences between the three important advisory roles.

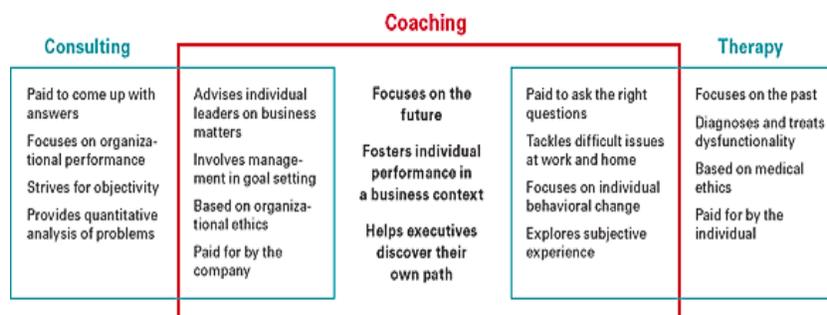


Figure 3: Source: *Coutu, D., & Kauffman, C. (2009, January) Harvard Business Review (p.5)*

Business coaching is ultimately about developing the coached individuals in the organization to effectively manage themselves, lead their people, and provide increased business results. The outcomes that should come from business coaching must, of necessity, include internal growth of the coaches which may largely be subjectively evaluated as well as outcomes that can be objectively measured.

As Audet and Couteret (2012) point out, coaching differs from consulting because consulting typically seeks an answer to a specific challenge, problem, or opportunity. Consulting success is, therefore, easier to measure since an outsider is tasked with providing the results. Coaching, however, involves the increased ability of the coachee to solve those types of challenges independently over time and is, therefore, much more difficult to assess.

Additionally, although coaching can serve as an excellent part of training and development, it should not be considered as synonymous with training. Murray Axmith (2004) suggests that coaching works best and is most frequently employed in situations of transition, fast tracking, performance and behavior changes, or to provide an outside confidant (page 1). These situations certainly don't fit entirely into the idea of developing new skill sets.

Dave Ulrich (2008) points out the differences between strategic and behavioral coaching and proposes that the coach and coachee must decide which of those two sub categories of coaching a particular engagement will follow. That helpful dichotomy may help decipher why some coaching engagements have mixed success—the coach and coachee (or organization) may not have clearly understood one another's expectations.

One distinctive that is pointed out in the literature is the difference between developmental and remedial coaching. Developmental coaching essentially is helping a good performer become a high performer. Remedial coaching, on the other hand, is an underperformer being asked to change behaviors and results. Coaching should be about unlocking the potential inherent in the person being coached. So, the focus should be on future performance, not past performance.

Strengths-based coaching, especially in small businesses, is also proposed as an approach for development of leaders and their employees to optimize their performance given the variety of their tasks and the criticality of each person's performance relative to the size of the organization.

Unfortunately, almost all the literature uses the terms *executive coaching* and *business coaching* synonymously and makes it difficult to discern the differences between these two distinct, yet heavily overlapping, disciplines. My perspective is that executive coaching is typically for non-owner leaders, while business coaching refers to coaching individuals or groups of people who are not only executives, but also owners.

What are the most important coaching outcomes for business leaders?

In their seminal work, Blackman et.al (2016) sought to review the universe of business coaching studies and determine whether the existing research regarding coaching effectiveness sufficiently supported the premise that business coaching provides appropriate positive outcomes for the coachees. Disappointingly, while the studies focused on very important areas of personal

development (see below), Blackman et al. failed to include any research on business results.

Below is a list of the key areas of coaching benefit uncovered in Blackman et al.'s meta-study:

- Improved ability to delegate appropriately (McGovern et al., 2001);
- Better stress management (Ladergard, 2011; Wales, 2003);
- Enhanced ability to address workplace conflict and work autonomously (Blackman, 2008; Gray, Ekinici, & Goregaokar, 2011; Smith Glasgow, Weinstock, Lachman, Dunphy Suplee, & Dreher, 2009);
- Increased personal accountability (Kralj, 2001);
- More innovation and creativity (Norlander, Bergman, & Archer, 2002; Styhre, 2008);
- Higher levels of initiative (Blackman, 2010; Sonesh et al., 2015); and
- More flexibility and adaptability (Hall, Otazo, & Hollenback, 1999).

Obviously, coaching should focus on those features most critical to the success of the client.

As Kumata discusses in her journal article, coaching is often focused exclusively on the individual behavior and therefore his or her personal benefit. Companies continue to invest in their leaders personal coaching because they believe that what benefits the leader will ultimately lead to better performance for the company as a whole. The results are not always easy to correlate with company performance, but Kumata sees company and leadership performance as intuitively associated concepts.

What if the leader or his company goals require success from the coaching that is more direct and explicit? Especially in small and medium enterprises (SME), the expected results are likely required to be direct and quickly ascertained. As Bell discussed in his interview (2014) SMEs represent the clear majority of the economic engine across the developed world and, therefore, is a critical and significant target for business coaching.

However, even the definition of success depends on the perspective of those who perform and evaluate coaching. For example, Bozer, et al. (2014) evaluated effectiveness based upon the coachee's self-awareness, job satisfaction, and job commitment. The perspectives of Bozer et al. apply to executive coaching (coaching of non-owners typically in larger organizations) and demonstrate the importance of clarifying the context within which coaching occurs. Bozer et al. focused on psychology training and education in relation to positive outcomes for the coaching experience.

In the study by Bono et al. (2009) of the fifteen topics addressed in the coaching sessions, the topic least frequently addressed (incredibly) was financial performance! The next least addressed topic in Bono et al.'s study was staffing. These two areas comprise the most important topics that should be discussed with business leaders. Of course, other topics, such as leadership and goal setting are vital because they indirectly lead to the success of the business. Again, the study focused on executive coaching as opposed to business coaching, further solidifying the importance of defining business coaching and its success measurements.

Mihiotis and Argirou argue that the success of coaching is due in large measure to three principal factors: (1) the quality of the coaches used, (2) the clarity of the mission to be accomplished, (3) and the commitment to the process by all those involved.

In any case, business coaching should focus on processes, mindset or behavior changes that are actionable and most impactful on business results. As Chartier points out, if coaches are providing insights that are simply platitudes that cannot change the results, their value is, at best, limited and certainly not measurable (2015, p. 83).

Based upon a recent multiple regression analysis, Tran Kieu Trang in the *International Journal of Business and Management* relates that knowledge on business and management, management skills, certain personal characteristics...and [the] experience of SME [small and medium enterprises] entrepreneur[s] are the factors that significantly and positively influence the success of SMEs (Trang, p.136).

In the Parker-Wilkins study (2006), 86% of the respondents believed that coaching had benefitted them in their leadership behavior. Sue Porter's (2000) case study on small business indicated a program that included these same topics.

In "Measuring the ROI of a coaching intervention" (Phillips, 2007) on measuring the ROI of coaching, the following two very helpful tables (Tables 1, 2) were indicative of what was to be learned and applied as a result of the coaching efforts. (Phillips, p.17) These elements were rated by the coachee as well as by the coach as to how successfully the desired elements were being learned and applied. The summary of these coaching objectives seems to best be described as growth in self-awareness, action bias, leadership effectiveness, and interpersonal skill. These will inform the survey elements for our case study.

Table 1

LEARNING FROM COACHING

MEASURES	EXECUTIVE RATING	COACH RATING
Understanding strengths and weaknesses	3.9	4.2
Translating feedback into action plans	3.7	3.9
Involving team members in projects and goals	4.2	3.7
Communicating effectively	4.1	4.2
Collaborating with colleagues	4.0	4.1
Improving personal effectiveness	4.1	4.4
Enhancing leadership skills	4.2	4.3

Table 1. Source: Phillips, (2007), p. 17.

Table 2

APPLICATION OF COACHING

MEASURES	EXECUTIVE RATING	COACH RATING
Translating feedback into action plans	4.2	3.9

Involving team members in projects and goals	4.1	4.2
Communicating more effectively with the team	4.3	4.1
Collaborating more with the group and others	4.2	4.2
Applying effective leadership skills	4.1	3.9

Note: The rating was a scale of 1 to 5, where 1 = unacceptable and 5 = exceptional.

Table 2. Source: Phillips (2007), p. 17.

Several other studies have focused on other coaching benefits as well: performance productivity benefits, new employee (less than one year) retention programs, field sales division improvement, learning, behavioral changes, business results, productivity improvements, employee satisfaction and teamwork. In the Gaskell study (2011), positive results attributed to coaching included increased sales, profitability, and management empowerment as they developed skills related to listening, time management, delegation, and focus on increased employee engagement. In the International Journal of Evidence Based Coaching and Mentoring (2005, Page 36) Leedham explored goals for coaching as perceived by small business leaders. Small businesses sought increased confidence and encouragement, as well as tangible and visible outcomes including skills development, strategic and inward focus, self-awareness, and seeing the big picture. In an article on what coaching can and cannot do for your organization, two major areas of outcome were cited as appropriate and effectual. Interestingly, the outcomes correlated with the level of the person being coached. For the CEO and top management team, alignment among the senior leadership team and strategy execution were the areas of positive correlation. For those just below the top management team, coaching impacting senior managers' use of appropriate leadership behaviors was effectual and positively correlated.

In the Consulting Psychology journal, Wasylyshyn, et. al. (2006) coaching was suggested as an important tool for leaders who will face increasing business challenges and will therefore require

heightened levels of emotional capability. To respond to these challenges, executives will not only tap into the normal leadership competencies but also emotional abilities to accelerate deeper, productive, relational connections. They cite these abilities as “self-awareness, resilience, empathy, authenticity, optimism and courage” (page 77). The benefit of having a coach direct the leader’s growth in these areas is advised.

An integral part of the entire question regarding coaching outcomes has to be the return on investment (ROI) of the entire process. Not only should the coachee appreciate the process and sense personal growth, the business needs to have profited as well.

Bernadette Crompton, et. al. provided some excellent feedback from a study on small business coaching: “from a practical ROI perspective, significant contributing effects of 20% variance in self-efficacy and 6% variance in firm growth resulting from business coaching, are of relevance to entrepreneurs contemplating engaging business coaches. Theoretically, this investigation provides solid evidence-based outcomes through the development and testing of a business coaching model consisting of essential ingredients of business coaching targeting entrepreneurs’ level of confidence which is aimed at firm growth. Thus, the development of this model, within the context of a grounded framework, adds substantially to the apparent dearth of literature on business coaching (Grant, 2005). In addition, this study provides the foundation for future outcome-based business coaching research.”

Additionally, other business concerns around employee morale and commitment are the subjects of much research recently. According to a recent study, “lack of engagement is endemic,

and is causing large and small organizations all over the world to incur excess costs, underperform on critical tasks, and create widespread customer dissatisfaction. The annual financial loss in the US due to disengagement of managers and employees is about US\$300 billion (Jerry Krueger and Emily Killham, 2005). Improving organizational performance requires a highly engaged and happy workforce.”

One of the key takeaways from the research is that coaching needs to produce measurable business results for it to truly be valued. When coaching is tangible and delivers ROI, it is taken seriously by businesses. Coaches who work on 'hard' as well as 'soft' issues will be more valued in most business communities (*Management services*, 2012, p.22) Additionally, as Carter, et. al. (2017) point out in their extensive study, coaching effectiveness is largely a function of willingness, clear successes measurements and aligned expectations.

Broad Insights has the ambition to work through self-awareness, conflict resolution and other soft concerns while at the same time delivering results that are meaningful and tangible.

Chapter III: Methodology

Questionnaire Design

The methodology chosen was an electronic, anonymous survey administered to all Broad Insights' former and current clients (the current client base has evolved slightly in the interim) to eliminate any sampling errors that might have occurred during probability sampling. Of course, the size of the sample is critical to drawing conclusions, so the survey was designed for a minimum of 40 respondents (out of a total population of 87 clients), a proportion that further suggests the validity of the results. Three methodological safeguards were designed into the study to ensure adequate response and minimize any potentially biased responses.

First, it is important to note that the survey was intentionally brief. It consisted of eight questions on one page. Eight of the respondents spent as little as two minutes in responding to the entire survey. This brevity was intentional to encourage the completion of all eight questions. In fact, all 52 respondents completed the entire survey.

Secondly, since the coaching relationship becomes very personal and close over time, the method of electronic sampling allowed for a non-threatening environment that enabled confidential candor, including potentially negative feedback. In a hypothetical personal interview, on the other hand, it is probable that the interviewee would have felt hesitancy in providing candid answers to the coaching organization and, therefore, could have introduced positive bias into the results.

Thirdly, the decision to include all clients was important to further reduce bias since those clients who remain with the firm are presumably convinced of the coaching value whereas

those clients who no longer are coached may have questioned its value. It was important, we believed, to eliminate any positive bias by including all of those who had experienced Broad Insights' coaching, even if they are no longer being coached. Some of those who are no longer clients may have left because they believed the process was ineffective or a poor investment, and, to the extent possible, their input was solicited to ensure non-biased results.

Finally, the concern of nonresponse error was considered since the total number of clients surveyed was 87 with a total of 52 respondents (60%). A reminder message was sent to the entire group of non-respondents after an interval of several days, but no third reminder was sent in order to not jeopardize the goodwill of the client base.

Population

We chose to survey 100% of Broad Insights' clients, both former and present, in order to eliminate as much bias as possible to avoid surveying only the current clients who are presumably more satisfied with Broad Insights. The total number of those surveyed was 87 and included clients and management team members that had had direct coaching contact with Broad Insights coaching members. Of the 87 surveys sent (via email), two "bounced" and another 12 surveys were never opened. Of the 73 properly addressed and opened, 52 completed the survey entirely (71%). No surveys were only partially completed.

The clients who experienced coaching represented various levels within their respective organizations. Many of Broad Insights' clients hold the title of President and/or CEO of their companies. However, other coaching clients included emerging leaders, members of middle management, and, in some cases, supervisors who were being developed for future roles.

It is also important to note that some of the coachees may have participated in remedial coaching (although that term was never used) and may be assumed to have been negatively biased against coaching since the process was imposed by a superior and could have been seen as punitive. This negative bias, if present, was not eliminated in the survey results.

Impact due to individual coach

In order to measure client satisfaction across the spectrum of Broad Insights' coaches, the survey included all clients irrespective of their individual coaches. The intention of the question regarding coaches was to ascertain whether the individual coach's approach made a statistically significant difference in the clients' experiences.

Of the 52 respondents, 34 (65%) identified Jim Wiginton as their coach. The remaining 18 responses (35%) were distributed among 8 other coaches. With such a small respondent-to-coach ratio among the 35%, there was not a large enough population associated with each coach to determine statistical significance between individual coaches. The relatively few number of responses per coach made any analysis of coaching impact impractical.

Length of coaching experience

The survey included a question about the length of coaching in order to determine whether or not the perceived results from coaching changed or evolved based upon the length of time the coachee has / had experienced coaching. The responses fell into four categories: fewer than six months (11 responses); between six months and one year (13 responses); between one and three years (21 responses); and more than three years (7 responses). Survey responses showed similar results for each category when respondents were asked whether they would

recommend Broad Insights' coaching to others. Since no category exceeded 21 responses, the results were interesting but not statistically significant.

Net promoter score question

We asked whether the client would recommend coaching. This score was based upon a scale of 1 to 10 and is a classic question that is benchmarked for Net Promoter Scores (Reichheld, 2003). Any response between 1 and 6 is classified as a detractor score, a 7 or 8 is considered passive, and any score of 9 or 10 is considered a promoter score. The Net Promoter Score (NPS) is calculated by taking the positive scores minus the detractor scores and eliminates the passive scores. The resulting NPS can then be benchmarked against similar services to gauge a particular company's effectiveness vis-à-vis other companies in the same industry. Of course, NPS is also an excellent tool to determine the evolution over time of any given company's customer satisfaction scores, allowing that company to measure its rate of progress against its past performance.

Questions regarding each client's view of his or her personal progress and progress in the areas of business acumen gave the clients an opportunity to relativize their perceived progress in two general areas: personal improvement and improvement as a business person. These questions were intended to allow the respondent to scale their perceived improvement without the necessity of defending their view or requiring specificity. Because of this lack of specificity, these results were not the focus of the analysis, but they did serve as a method for allowing the respondent to evaluate their experience from a broader perspective.

Return on Investment

The survey included a question to gauge the perceived value of coaching compared to the expense of the coaching service. (Some of the clients were managers within larger coaching client organizations and thus may not have been aware of the precise cost of the coaching service.) The question for measuring ROI was designed to allow for the clients to choose on a scale between a negative ROI to a positive ROI. This scale largely eliminated a hypothetical positive bias according to which some respondents might assume that coaching has an inherently positive ROI, in which case the question would have been simply how positive was the ROI.

The scale ranged from 1 to 100, with 50 representing the breakeven point. The structure of this question required a different statistical analysis (two-tailed t-value) to properly assess the results.

Open-ended question

The survey also included a question that allowed for the respondents to comment on the positive benefits of coaching. An analysis of the most frequently mentioned words appears in the appendix (see p.82). This was incorporated to discern if there were areas of benefit for the clients not included in the original expectations.

Benefits received from coaching

The final question in the survey was designed as a multiple-choice question around six areas of potential benefit. These six areas were found in the literature to be those most widely cited as reasons for the engagement of a coach. Three areas focused on the individual client's personal attributes: leadership effectiveness, strategic clarity, and short-term decision making.

The other three areas addressed business results observed from having been coached: financial results, employee engagement and customer satisfaction.

The survey covered each of the six areas with regards to the *direct* impact of coaching on individual and business results. Each respondent was given the options of *not applicable*, *no change*, or *deterioration* in addition to the three choices regarding potential intensity of change – minimal, significant, and radical. Any response that indicated minimal progress (or less) was considered to be less than satisfactory to Broad Insights, while significant to radical positive change was considered successful. The survey attempted to remove choices that were ambiguous regarding the success of coaching.

Response rate

Over a period of one week, there were 87 invitations sent with a reminder sent to 51 people. The total number of people who clicked through the survey was 59, with a total of 52 who responded to the survey. We chose to not send subsequent reminders to avoid irritating the current and former Broad Insights' client base. All responses remained anonymous.

Reliability and validity

The entire customer base for Broad Insights, from its inception in 2012, was queried. All clients, irrespective of their level of perceived satisfaction received a survey via Survey Monkey. Of the 87 sent, 73 were opened, leaving a remainder of 12 unopened and 2 which bounced due to an apparent erroneous or obsolete email address. No attempt was made to discern who had responded in order to eliminate biases due to perceptions of favorable or unfavorable responses.

Chapter IV: Findings and Analysis

The purpose of this study was to determine whether business coaching measurably benefits the leader and his or her organization via feedback provided by the actual beneficiaries of coaching. The study sought to discern whether the progress attributed to coaching was more than would have occurred naturally through increased experience. Since business coaching is not a discipline that requires licensure, it is important that potential clients have some assurances of the real, measurable benefits of entering into a coaching engagement.

In this section, the results of the survey are disclosed and analyzed. Each of the six aforementioned results (leadership effectiveness, strategic clarity, short-term decision making, customer satisfaction, employee engagement and financial results) are analyzed and compared with the hypothesis that coaching makes no measurable difference in the behavior or results of a client. Additionally, the question of whether coaching is worth the investment in time and expense is also analyzed via the Return on Investment (ROI) question within the survey. Finally, the investigation includes a comparison of the Net Promoter Score (NPS) with other similar companies, along with the comparison within Broad Insights' client base of client satisfaction depending upon the length of time they have been coached.

Sample size

Because some of the clients believed that some of the possible impacts due to coaching bore no relation to their experience, the number of respondents to each question varied from 41 to 52. Each of the six categories of change included "not applicable"; when that choice was selected, the response was eliminated from statistical consideration.

Null hypothesis

In each of the six areas, the null hypothesis or the assumed non-effectiveness of coaching was included in the response “minimal improvement”. This conservative approach assumes that even without coaching, a leader should be expected to make minimal improvement over time simply due to increased experience. The results were, therefore, even more impressive for those elements that were statistically significant, because they were tested to ensure that the progress noted was verifiably progress *above* minimal improvement.

Significance level

The study also chose a significance level of .01 to further ensure a conservative approach to the study. If the results suggest statistical significance, the use of .01 as the level of significance suggests a higher confidence of the accuracy of those conclusions. The results are delineated below, in order of the probability that coaching significantly impacted the client’s growth and results.

Tool used

Depending on the question, the study employed one and two-tailed hypotheses, using the t-test calculations for a single sample from socscistatistics.com

Question by question detailed results

Leadership effectiveness

The area in which improvement correlated most strongly with coaching was leadership effectiveness. When taking the survey, 98% of the respondents indicated at least minimal progress from coaching, and the majority of clients strongly believed that they had made more than only minimal progress as effective leaders. Of the 52 total respondents, 47 believed they had experienced enough coaching in leadership that a response of “not applicable” in this area was not appropriate. The results in detail were as follows:

Table 1

Result	Number of responses
No change	1
Minimal improvement	8
Significant improvement	36
Radical improvement	2

The Number of respondents who marked a response other than “not applicable” was 47.

Results from socscistatistics.com:

t- test Calculator for a Single Sample

One-tailed hypothesis

Significance level: .01

The t-value is 10.853012. The p-value is < 0.00001. The result is significant at $p < 0.01$.

At the 99% confidence level, Broad Insights' coaching left clients who participated in leadership coaching with the sense that their leadership was more effective as a direct result of the coaching process. The null hypothesis, that Broad Insights' coaching does not make at least a significant impact on the clients' perception of their progress in leadership effectiveness, can be safely rejected.

Based on the data reported in Table A1, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is rejected at the 99% percent confidence level. More specifically, for a one-tailed test, for given sample size of 47 respondents the t-value is 10.853012 (p-value of < 0.00001), indicating rejection of the null hypothesis at any reasonable level of confidence.

Short-term decision-making

According to the survey responders, the second area in which business coaching corresponded with improved performance was short-term decision-making. A majority of respondents strongly believed that they had made more than minimal progress as decision makers. Forty-four of the 52 total respondents believed they had experienced enough coaching in this area that a response of "not applicable" was not appropriate. The precise results were as follows:

Table 2

Result	Number of responses
No change	2
Minimal improvement	12
Significant improvement	25
Radical improvement	5

The number of respondents who marked a response other than “not applicable” was 44.

Results from socscistatistics.com:

t- Test Calculator for a Single Sample

One-tailed hypothesis

Significance level: .01

The t-value is 6.916029. The p-Value is < 0.00001. The result is significant at $p < 0.01$.

At the 99% confidence level, Broad Insights coaching left clients, who participated in leadership coaching, with the sense that their short-term decision making was more effective as a direct result of the coaching process. The null hypothesis, that Broad Insights’ coaching does not make at least a significant impact on the clients’ perception of their progress in short-term decision making, can be safely rejected.

Based on the data reported in Table A2, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is rejected at the 99% percent confidence level. More specifically, for a one-tailed test, given the sample size of 44 respondents the t-value is 6.916029 (p-value of < 0.00001), indicating rejection of the null hypothesis at any reasonable level of confidence.

Strategic clarity

The third strongest correlation of impacted area was strategic clarity, according to the survey responders. A majority of clients strongly believed that they had made more than minimal progress in clarifying their strategies. Of the 52 total respondents, 48 believed they had experienced enough coaching in this area that a response of “not applicable” was not appropriate.

The precise results were as follows:

Table 3

Result	Number of responses
No change	3
Minimal improvement	13
Significant improvement	29
Radical improvement	3

The number of respondents who marked a response other than “not applicable” was 48.

Results from socscistatistics.com:

t- Test Calculator for a Single Sample

One-tailed hypothesis

Significance level: .01

The T-value is 6.650962. The P-Value is < 0.00001. The result is significant at $p < 0.01$.

At the 99% confidence level, Broad Insights coaching left clients who participated in leadership coaching with the sense that their ability to have clarity about their strategy was more effective as a direct result of the coaching process. The null hypothesis, that Broad Insights' coaching does not make at least a significant impact on the clients' perception of their progress in strategic clarity, can be rejected.

Based on the data reported in Table A3, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is rejected at the 99% percent confidence level. More specifically, for a one-tailed test, the given sample size of 48 respondents the t-value is 6.650962 (p-value of < 0.00001), indicating rejection of the null hypothesis at any reasonable level of confidence.

Employee engagement

The fourth strongest correlation between impacted area and business coaching was employee engagement. The survey responders strongly believed that they had made more than only minimal progress with regards to clarifying their strategies. Of the 52 total respondents, 46

believed they had experienced sufficient coaching in this area that a response of “not applicable” was not appropriate. The precise results were as follows:

Table 4

Result	Number of responses
Deterioration	1
No change	4
Minimal improvement	8
Significant improvement	29
Radical improvement	4

The number of respondents who marked a response other than “not applicable” was 46.

Results from socscistatistics.com:

t- Test Calculator for a Single Sample

One-tailed hypothesis

Significance level: .01

The T-value is 5.411002. The P-Value is < 0.00001. The result is significant at $p < 0.01$.

At the 99% confidence level, Broad Insights coaching left clients who participated in leadership

coaching with the sense that employee engagement was more effective as a direct result of the coaching process. The null hypothesis, that Broad Insights' coaching does not make at least a significant impact on the clients' perception of their progress in employee engagement, is rejected.

Based on the data reported in Table A4, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is rejected at the 99% percent confidence level. More specifically, for a one-tailed test, the given sample size of 46 respondents the t-value is 5.411002 (p-value of < 0.00001), indicating rejection of the null hypothesis at any reasonable level of confidence.

Customer satisfaction

The next strongest correlation of an impacted area with business coaching was customer satisfaction. According to the survey responders, 50% of the clients strongly believed that they had made more than minimal progress with regarding to satisfying their customers. Of the 52 total respondents, 44 believed they had experienced enough coaching in this area that a response of “not applicable” was not appropriate. The precise results were as follows:

Table 5

Result	Number of responses
No change	8
Minimal improvement	14
Significant improvement	17
Radical improvement	5

The number of respondents who marked a response other than “not applicable” was 44.

Results from socscistatistics.com:

t- Test Calculator for a Single Sample

One-tailed hypothesis

Significance level: .01

The T-value is 3.096452. The P-Value is 0.001721. The result is significant at $p < 0.01$.

At the 99% confidence level, Broad Insights’ coaching left clients, who participated in leadership coaching, with the sense that their ability to satisfy their customers was more effective as a direct result of the coaching process. The null hypothesis, that Broad Insights’ coaching does not make at least a significant impact on the clients’ perception of their progress in client satisfaction, is rejected.

Based on the data reported in Table A5, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is rejected at the 99% percent confidence level. More specifically, for a one-tailed test, given the sample size of 44 respondents the t-value is 3.096452 (p-value of < 0.00001), indicating rejection of the null hypothesis at any reasonable level of confidence.

Financial results

According to the survey responders, the area displaying the lowest correlation between business coaching and measurable results was financial results. In fact, at significance levels of .01, .05, and .1, the respondents reported no statistically significant correlations perceived between coaching and financial results. Of the 52 total respondents, 41 believed they had experienced sufficient coaching in this area that a response of “not applicable” was not appropriate. The precise results were as follows:

Table 6

Result	Number of responses
No change	9
Minimal improvement	18
Significant improvement	13
Radical improvement	1

The number of respondents who marked a response other than “not applicable” was 41.

Results from socscistatistics.com:

t- Test Calculator for a Single Sample

One-tailed hypothesis

Significance levels: .01, .05, .10

The T-value is 1.182395. The P-Value is 0.122015. The result is not significant at $p < 0.01$.

The T-value is 1.182395. The P-Value is 0.122015. The result is not significant at $p < 0.05$.

The T-value is 1.182395. The P-Value is 0.122015. The result is not significant at $p < 0.10$.

Even at the 90% confidence level, Broad Insights’ coaching left clients who participated in leadership coaching with no statistically significant correlation between the coaching process and their financial results. The null hypothesis, that Broad Insights’ coaching does not make at least a significant impact on the clients’ perception of their progress in financial results, is not rejected.

Based on the data reported in Table A6, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is accepted at the 90%

percent confidence level. More specifically, for a one-tailed test, given sample size of 41 respondents the t-value is 1.182395 (p-value of 0.122015) indicating acceptance of the null hypothesis at any reasonable level of confidence.

ROI: Return on Investment

One of the most important questions on the survey asks whether the investment in coaching is worth the money. Of the 52 total respondents, 50 believed they had experienced enough coaching in this area that a response of “not applicable” was not appropriate. Interestingly, this question allowed for the possibility of widely varying results, ranging from the potential of an extremely negative ROI (0 on a scale from 0 to 100) to an extremely positive ROI (100 on a scale from 1 to 100). The precise results were as follows:

Table 7

Result	Respondents
Extremely negative (0 to 19)	0
Negative (20 to 44)	2
Breakeven (45 to 54)	7
Positive (55 to 79)	16
Extremely positive (80 and above)	25

The number of respondents who marked a response other than “not applicable” was 50.

Results from socscistatistics.com:

t- Test Calculator for a Single Sample

Two-tailed hypothesis

Significance level: .01

The T-value is 10.373943. The P-Value is < 0.00001. The result is significant at $p < 0.01$.

At the 99% confidence level, most Broad Insights coaching clients believe that the investment in coaching returned more than the investment.

Based on the data reported in Table A7, the null hypothesis that Broad Insights' coaching does not impact or make a difference on clients' perception of progress is rejected at the 99% percent confidence level. More specifically, for a one-tailed test, given the sample size of 50 respondents the t-value is 10.373943 (p-value of < 0.00001), indicating rejection of the null hypothesis at any reasonable level of confidence.

Likelihood of recommending coaching to others

This question correlates to the Net Promoter Score, which takes the number of respondents considered promoters (9, 10 on a scale of 1 to 10), ignores the passives (7,8 on a scale of 1 to 10), and subtracts the detractors (1 to 6). The scores can range from a -100 to a 100.

Depending on the industry (see the results on page 94), a score above 0 may be considered acceptable. The detailed results from the Broad Insights’ survey (52 responses) appear below.

Table A8

Results	Respondents
Detractors (1 to 6)	5
Passives (7 or 8)	12
Promoters (9 or 10)	35

Broad Insights’ Net Promoter Score:

$$Promoters - Detractors = 35 (67.3\% \text{ of total}) - 5 (9.6\% \text{ of total}) = 57.7\%$$

Score = 57.7

This score compares very favorably with benchmarks for consulting and other B2B organizations. (see Appendix, page 94) One must be careful not to make comparisons across divergent industries, as such comparisons are often invalid. However, the following list of NPS “stars” (top performers) was identified by Fred Reichheld in his 2006 *Harvard Business Review* article. This list suggests that Broad Insights’ score rates very highly as compared to these top performers. By way of comparison, consider the following scores: USAA 82%; HomeBanc* 81%; Harley-Davidson 81%; Costco 79%; Amazon 73%; Chick-fil-A* 72%; eBay 71%; Vanguard 70%; SAS 66%; Apple 66%; Intuit (TurboTax)* 60%; Cisco 57%; Federal Express 56%; Southwest Airlines 51%; American Express 50%; Commerce Bank 50%; Dell 50%; Adobe 48%; and Electronic Arts 48% (Reichheld, 2006)

CHAPTER V: Conclusions and Recommendations

Reflection on Findings

For Broad Insights, the findings discussed in the preceding chapter constitute a significant and positive result. Unquestionably, Broad Insights' business coaching matters! Of the six targeted areas, five showed a very positive correlation between the coaching experience and the results for its clients. At a 99% confidence level, Broad Insights' clients clearly believe that, on average, the coaching process has provided results above the investment required and has led to progress for them and their organizations across a spectrum of areas. The null hypothesis, that Broad Insights' coaching does not make at least a significant impact on the clients' perception of their progress, was rejected in five of the six tests.

Additionally, the clients are generally very positive about their experiences and are willing to recommend coaching to those with whom they interact. The NPS for Broad Insights is extremely high compared to most benchmarks.

Clearly, according to the survey results, soft skills (leadership effectiveness, strategic clarity, and decision-making skills) are most positively impacted by business coaching. Similarly, two other areas that have been the focus of Broad Insights' coaches and have more readily measured results (customer satisfaction and employee engagement) also showed statistically significant results.

The area that showed no perceived correlation between coaching and outcome, financial results, is a topic of extreme importance. The Broad Insights' clients have either not seen progress or it has not been explicitly connected by the coaches to the coaching process.

Next Steps

Based on the above data, Broad Insights must either do a better job of focusing on the financial results or of explaining how the actions taken by the client due to coaching will directly or indirectly affect the financial results. Business leaders are constantly evaluating each of their expenditures and must justify these expenses based upon a real or perceived ROI. Although the ROI for coaching is unquestionably positive for most of its clients, a more tangible and measurable monetary return may be necessary in order make the client decision to continue coaching more readily justifiable.

Additionally, Broad Insights should use the results of this study to market aggressively to those who are considering the coaching investment. It is unlikely that many of Broad Insights' competitors have these strong, quantifiably defended results, so this study should serve as an excellent tool in promoting and differentiating Broad Insights from those coaching organizations that have not studied the effects of coaching on their clients' progress.

A further area of improvement for Broad Insights and for business coaching organizations at large should be a refined capacity for capturing quantifiable, direct impacts due to coaching. Such data collection is of course difficult, because business leaders will typically see their progress as a compilation of many factors. Among the many ingredients of progress, business coaching plays a complex role as both component and catalyst.

Nevertheless, a word of caution must be directed to business coaches interested in increasing metric results: we exist to make a difference in the leaders' lives and their organizations' results, not primarily to market our own effectiveness.

Future studies should attempt to further quantify an extended array of results. The list that follows suggests examples of studies that would be both relevant and measurable. The difficulty with any of these studies, of course, is their ability to accurately isolate the effects of coaching from the effects of all other inputs that may lead to similar results. Nonetheless, the following topics would be of immense interest to potential business coaching clients, as well as to the practice at large.

Topic	Measurement	Methodology	Importance
Client customer satisfaction	Net promoter score or similar tool	Capture the current result prior to commencement of coaching	Determine impact of coaching intervention
Employee engagement scores	Employee engagement survey	Capture the current result prior to commencement of coaching	Determine impact of coaching intervention
Financial metrics (ROA, net profitability, sales, etc.)	Standard, but consistent financial measurement tools	Capture the current result prior to commencement of coaching	Determine impact of coaching intervention
Leadership effectiveness	360-degree analysis or similar tools	Capture the current result prior to commencement of coaching	Determine impact of coaching intervention

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APPENDICES

Client Testimonials

Scott G.

“We’ve worked with Broad Insights for over 3 years and have seen tremendous overall improvement in our employees and processes. Very pleased to have worked through a number of challenging issues and grown our people. Jim has done a great job helping us uncover opportunities by helping each of us to get better at what we do.”

Elias B.

“I am thankful every day for the help that Joseph is to our company and to me personally. I was a software developer looking to transition into the role of CEO for a growing company in Greenville. Joseph has helped me to understand how incredibly different my new role is and patiently walked me through what needed to change in my own life and perspective in order to successfully navigate the transition. The step to hire a business coach was difficult to make because I did not see the value. Since that time, I have thought more than once during a coaching session, “He just paid for himself for this month with that advice. I appreciate Joseph’s candor and good spirit. His coaching is helping us be more successful.”

Micah B.

"Since working with Joseph/Broad Insights we've increased revenue by 50%, profits by 200%, and client satisfaction by over 100%. The Value that we've received from our coaching with Broad Insights has been phenomenal and enabled us to take the next step in developing our organization."

Jarrold B.

"The progress my company has made in the past year, due to the guidance of Joseph at Broad Insights, has been tremendous. He has assisted us in implementing systems to enhance efficiency; helped us redirect our focus on important areas such as customer experience; and challenged me with questions that have taken my business to the next level. Joseph's shared knowledge and coaching has been very beneficial to both me and my company. I am very grateful for his guidance!"

David S.

"A special challenge can be encountered when coaching a long-standing family business. Jim Wiginton and Broad Insights immediately stabilized the business through better financial records, cost controls and production metrics thus giving us more time to work through the relational issues of the business."

Lyle S.

"Working with Jim and his team at Broad Insights this past year has proved to be very beneficial for our company. At times, it has been very uncomfortable and a challenging journey with Broad Insights coaching us. However, it has helped us to improve and grow both personally and as an organization. The team at Broad Insights has helped improve communication amongst the managing members, which has provided clarity to our vision and unity to our goals."

Don S.

"As part of a family-owned operation, I have observed Jim guide our team through some very challenging topics and debates where opinions differ.... discussions we would not be able to navigate our way through without him. It's reassuring to partner with someone who searches for how to proceed by first bathing the issue in prayer."

Karlan T.

"Jim Wiginton through Broad Insights provided my firm with valuable help in clarifying our thinking. Jim is gifted at getting to the bottom line quickly which facilitates helping us make good decisions quickly. Your company is largely the sum total of leaderships thinking so Jim proved invaluable in this area. For example, don't believe everything you think! Perhaps how you arrived at what you believe needs to be revisited. Since you can't manage what you can't measure Jim facilitated in the creation of new reports that aided tremendously in our forecasting and making better more profitable decisions. As CEO, I found Jim to provide value on par and often exceeding a typical boardroom."

Andres D.

"Having Joseph as a business coach is having someone who can stand apart from my day to day work environment and see the bigger picture. This means I can plan each step with the end result in mind rather than simply react to whatever is directly in front of me."

Joel B.

“I appreciate the type of relationship that Broad Insights has formed with me and my team. While compassionate to the fact that change is never easy, Jim brings a determination to help me see the need for change and how to change. His genuineness as a friend does not get in the way of the truth!”

Zach S.

"Words can hardly express how grateful I am for having been introduced to Broad Insights. From the very first meeting, Joseph Bartosch has been dialed in to what we need most in our business in terms of strategy and performance. Our one-on-one sessions have proven to be a huge part of my own personal development as a leader both personally and professionally alike. Working with this group has been one of the best decisions we've made for our company, and I highly recommend them to any business owner or corporate group looking to experience tangible results in the same way that we have."

Ed S.

“I’ve really enjoyed working with Jim. He came in with cost saving ideas that have more than paid for his services. He carries a wealth of experience and knowledge. Our business has been blessed by him being on our team.”

Micah B.

"Joseph has enabled me to make a greater impact in driving both the top and bottom lines of my organization! I've found his broad array of expertise spanning from client acquisition all of the

way through operations and into long term client relationships to be very valuable. What is particularly impressive to me are three things about Joseph: He has a sharp focus on what will make the greatest impact.

He has an excellent way of coaching me through thinking about issues rather than just dispensing his own opinions. I believe that Joseph cares deeply about the success of our business. I do not sense that I am just another client to him."

Mark W.

"I engaged Joseph Bartosch for two major issues serving one major goal: I wanted to "buy back" family time in my busy life. First, I engaged him to consult with me regarding my small business. In our very first meeting he perceived the flaws in my business model and helped me fix them, giving me confidence to offload some tasks to a freelancer, raise my prices, and actually make my clients more happy, not less. I subsequently engaged him for consultation work as I entered salary negotiations for a new full-time position in another state. He and I carefully went over all the numbers in multiple meetings, and his advice helped me to leave my current job smoothly. He also singlehandedly enabled me to get 40% more pay than the baseline I was initially offered. Money, however, is not the only thing Joseph cares about. He is something of a life consultant, too, and his advice has always proven valuable to me, even outside business. Simply put, he is wise. I don't know a better praise to offer, or a better sales pitch for a business consultant."

Andres D.

"Joseph has come along side me as I have moved into a new role and provided invaluable direction. Much of what I have needed is someone to act as a mirror and let me see myself from a different perspective and he has provided that exact thing. Joseph also has insight into what it means to focus on your core competency. I couldn't spend a better hour then working with Joseph on my objectives and future planning."

Survey Questions

Broad Insights coaching effectiveness survey



* 1. Who was / is your coach?

- Joseph Bartosch
- David George
- Tim Joiner
- Erik Knutson
- Tim Morgan
- Kevin Oberlin
- Jim Wiginton
- Randy Wilkins
- Other (please specify)

* 2. How long have you been being coached?

- Fewer than 6 months
- Between 6 and 12 months
- Between 1 and 3 years
- More than 3 years

* 3. How likely would you be to recommend coaching to others? (1-10)

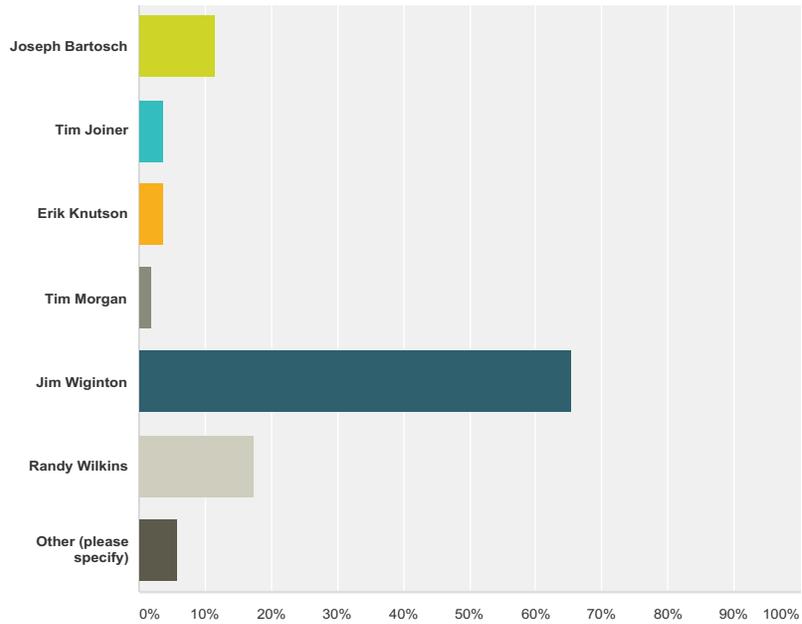
Not likely Very likely

Survey Responses

Broad Insights coaching effectiveness survey

Q1 Who was / is your coach?

Answered: 52 Skipped: 0



Answer Choices	Responses
Joseph Bartosch (1)	11.54% 6
Tim Joiner (3)	3.85% 2
Erik Knutson (4)	3.85% 2
Tim Morgan (5)	1.92% 1
Jim Wiginton (7)	65.38% 34
Randy Wilkins (8)	17.31% 9
Other (please specify) (9)	5.77% 3
Total Respondents: 52	

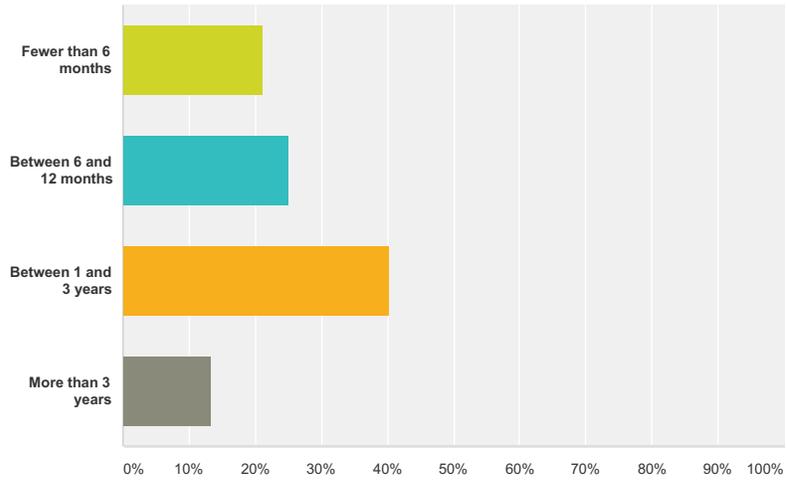
Basic Statistics				
Minimum 1.00	Maximum 9.00	Median 7.00	Mean 6.35	Standard Deviation 2.16

#	Other (please specify)	Date
1	Gustavo Nieves	5/16/2017 10:16 AM
2	I'm in a unique situation because I was coached by two coaches. One with BI, the other independent.	5/12/2017 10:11 AM

Broad Insights coaching effectiveness survey

Q2 How long have you been being coached?

Answered: 52 Skipped: 0



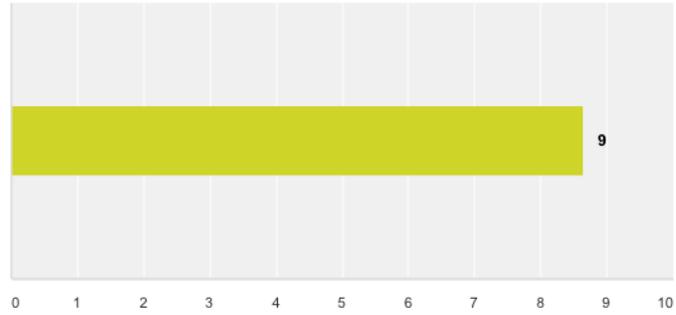
Answer Choices	Responses
Fewer than 6 months (1)	21.15% 11
Between 6 and 12 months (2)	25.00% 13
Between 1 and 3 years (3)	40.38% 21
More than 3 years (4)	13.46% 7
Total	52

Basic Statistics				
Minimum 1.00	Maximum 4.00	Median 3.00	Mean 2.46	Standard Deviation 0.97

Broad Insights coaching effectiveness survey

Q3 How likely would you be to recommend coaching to others? (1-10)

Answered: 52 Skipped: 0



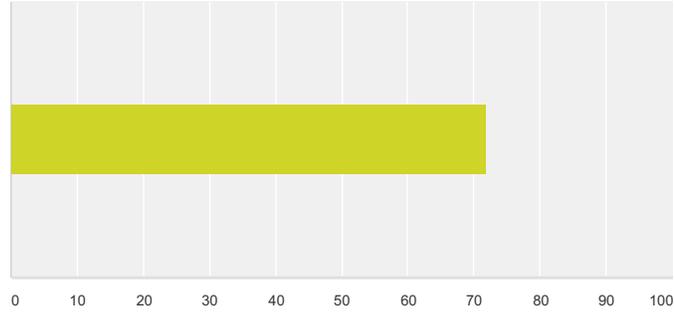
Answer Choices	Average Number	Total Number	Responses
	9	449	52
Total Respondents: 52			

Basic Statistics					
	Minimum	Maximum	Median	Mean	Standard Deviation
	0.00	10.00	9.00	8.63	1.86

Broad Insights coaching effectiveness survey

Q4 Do you believe you have made personal improvement (communication, conflict resolution, leadership, etc.) as a direct result of coaching? (1-100)

Answered: 52 Skipped: 0

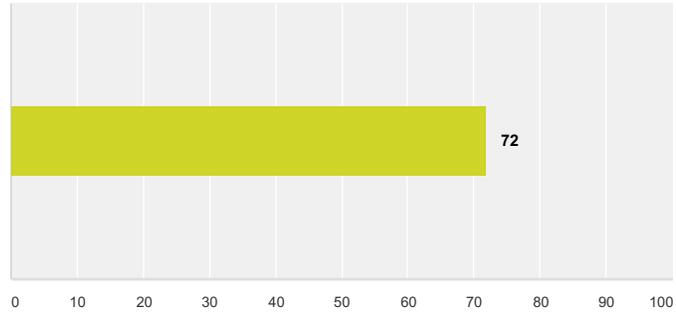


Answer Choices	Average Number	Total Number	Responses		
	72	3,738	52		
Total Respondents: 52					
Basic Statistics					
	Minimum	Maximum	Median	Mean	Standard Deviation
	0.00	100.00	75.00	71.88	21.97

Broad Insights coaching effectiveness survey

Q5 Do you believe you have made progress as a business person (decision maker, better planner, more effective and knowledgeable) as a direct result of coaching? (1 - 100)

Answered: 52 Skipped: 0

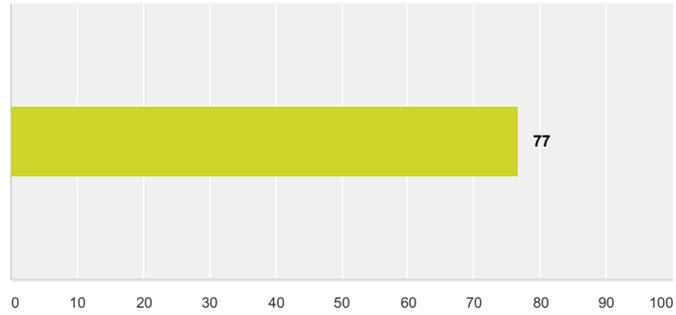


Answer Choices	Average Number	Total Number	Responses		
	72	3,734	52		
Total Respondents: 52					
Basic Statistics					
	Minimum	Maximum	Median	Mean	Standard Deviation
	0.00	100.00	75.00	71.81	23.10

Broad Insights coaching effectiveness survey

Q6 Compared to the time and expense of coaching, how would you evaluate your return on investment (ROI)?

Answered: 50 Skipped: 2



Answer Choices	Average Number	Total Number	Responses
	77	3,830	50
Total Respondents: 50			

Basic Statistics					
	Minimum	Maximum	Median	Mean	Standard Deviation
	27.00	100.00	79.50	76.60	17.95

Q7 What are the most positive impacts of coaching you have experienced? (Please be specific)

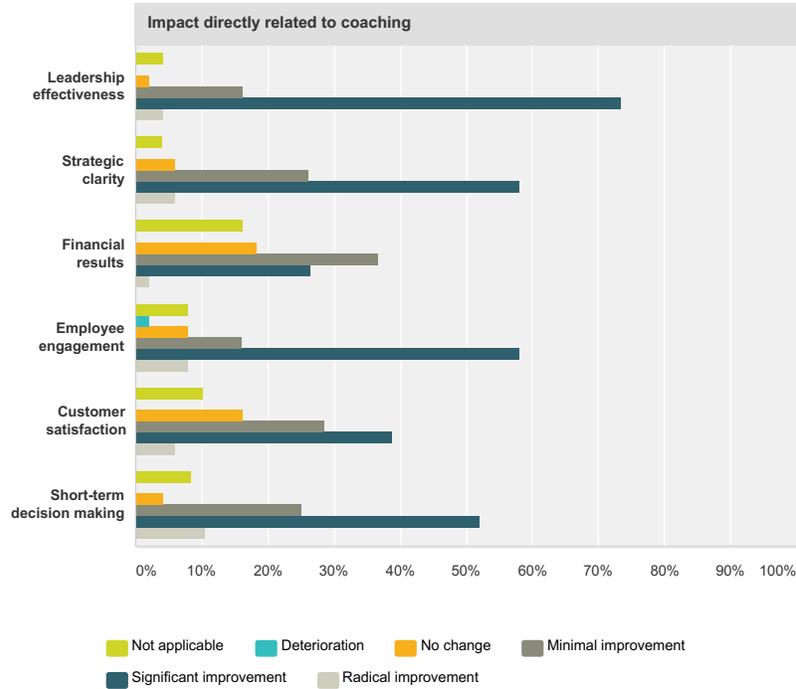
Answered: 43 Skipped: 9

Communication Focus Organization Budget
Business Conflict Resolution Decisions
Experience Dealing Coaching Learning
Better Leader Issues Important Future Listen Team

Broad Insights coaching effectiveness survey

Q8 Please evaluate the benefits you and your organization have received from coaching.

Answered: 50 Skipped: 2



Impact directly related to coaching							
	Not applicable (1)	Deterioration (2)	No change (3)	Minimal improvement (4)	Significant improvement (5)	Radical improvement (6)	Total
Leadership effectiveness	4.08% 2	0.00% 0	2.04% 1	16.33% 8	73.47% 36	4.08% 2	49
Strategic clarity	4.00% 2	0.00% 0	6.00% 3	26.00% 13	58.00% 29	6.00% 3	50
Financial results	16.33% 8	0.00% 0	18.37% 9	36.73% 18	26.53% 13	2.04% 1	49
Employee engagement	8.00% 4	2.00% 1	8.00% 4	16.00% 8	58.00% 29	8.00% 4	50
Customer satisfaction	10.20% 5	0.00% 0	16.33% 8	28.57% 14	38.78% 19	6.12% 3	49
Short-term decision making	8.33% 4	0.00% 0	4.17% 2	25.00% 12	52.08% 25	10.42% 5	48
Basic Statistics		Minimum	Maximum	Median	Mean	Standard Deviation	

What are the most positive impacts of coaching you have experienced? (Please be specific)

Affirmation that I have a good team in place!

That asking the right questions begin to produce the desired effects.

Don't wait to get it like you want it, get the 5% today or this week...it's cumulative.

Learning to be a leader from various levels

Coming at the from a person who was not a natural businessman, and has no innate ability in business. The lessons I have received, are timely, well thought out, and always spot on. Weather leaning client facing things from Tim, how to present, deal with, and work with our clients, how to project manage and how to work with the books from Gustavo, learning what accounting terms means, learning the nomenclature of business, what happened to money and how's it allocated and those initial sessions with Jim have been incredible. To say that this continues to be life changing would be a major understatement, and growth for me is a continual process. I'm blessed beyond measure. Thanks to all the guys.

I understand better how to prioritize the responsibilities I'm uniquely capable of doing

in the organization, as well as how to partner with other team members that are more capable in areas where I am not.

Thinking more strategically. Thinking with less emotion and more focus on profit and direction.

DEALING WITH EMPLOYEE ISSUES

Learning to listen and slow down in making decisions.

Better financial reports exist, better bookkeeping services exist, increased financial institution confidence, increased transparency of bookkeeping, more involvement of all partners (not all positive), better cost controls somewhat, much groundwork prepared for the future but not realized to this point

Attempting to view opinions of other partners in the organization through their eyes is beneficial. But that also leads to trying to determine their motivation and level of transparency. Additionally, focus on getting checks and balances in place is healthy for the organization. We have made some strides in these areas. Business decisions must be justified by the numbers both financial and operational...it is important that we stress that decisions be based on results not emotions. Sometimes hard decisions need to be made for the health of the organization.... such as what capital improvements are justified, what variable costs are justified, etc. These decisions are made through analysis of metrics - not based on wants or perceived needs. Results are imperative. Positives are great but negatives are worthy of sharing as well. It is

important to realize that our coach is trying to help us correct problems that have been developed over several decades. So, the solutions are not simple. The most negative experience thus far is that we tend to bring up topics to discuss and we fail to close the topic with a final decision.... then it does not get handled in the next month's meeting for one reason or another which then allows things to fester for months causing hard feelings or bitterness. This gets very distracting in the everyday operation of the business. Additionally, there have been directives handed out to individuals. While several have followed through with the assignments, others have chosen to disregard or not follow through at all. No follow up by the coach as to why leads ultimately to diminished respect for what we are trying to accomplish in the group.

Engagement

Communication within the company.

Awareness of getting to the root of issues. Decisiveness. Creativity in problem solving.

Dealing with important pressing issues on a timely basis.

As I mentioned in the first answer. I was coached at the time by two coaches.

Currently, I am being coached by an independent coach (you all would know who it is). But I'm a firm believer in how coaching impacts change. The biggest lesson I've learned is that "you can't change others, you can only change yourself and how you act around them." Coaching from BI and my other coach has given me clarity and empowerment to act on change. My coaching from BI has been about 1yr. The independent has been coaching me for about 3 years. As far as the most positive impacts, I'd say confidence, effective communication skills, leading from a 360 degrees perspective, decision making and knowing what to own and what not to own. I'm a young entrepreneur with no previous executive experience. The leadership and executive decision-making skills and confidence I have gained from coaching are invaluable. I'm much more intentional and strategic than I was before, and I'm spending my time on entirely different (better!) things.

How to listen to an employee about their problems and work with them to be a better person.

Developing a budget for the bank after a down year. Proposal development.

Coaching has taught me better organizational skills. Coaching has taught me to delegate work and trust those to whom the authority to make decisions has been delegated

Better communication for our team.

Sounding-board. Access to another's experience

Infractions have been admitted to and forgiveness has been given. Opening our eyes to using benchmarking and metrics to analyze the business have been valuable.

As far as being developed as a leader, I've learned that there is not one set way to lead.

There are various approaches that need to be considered based on the personality of the business owner therefore the coaching has been tailored to help me understand how to lead based on the strengths of my own specific personality. But then also pinpointing weaknesses that need to be improved upon while surrounding myself with people who are strong in these areas.

Opening up. Discussing issues that 'turn' on the inside.

Provided a goal for us to work towards even though we are not together on a lot of things.

Getting a big picture on what needs to be done and what is possible when we act. Also picked up some great negotiating tactics and have learned to be more aware of interpersonal dynamics and framing key conversations and decisions.

Organization, clarity of thoughts and planning.

LEARNING TO BE A GOOD LISTENER FIRST AND THEN SLOW TO SPEAK

Not just business benefits, but personal benefits in addressing my weak areas.

Going into our budget and finding areas to save money and make us more profitable

BEING A BETTER LEADER

Very little coaching was done directly to me. But improvements to others, Scott, was duly noted. Personally, the coaching given to me was appreciated and I put into practice. I did see some matters from a different view. Thanks to Jim.

Having someone who has led a business take time to understand the issues and give constructive feedback. I expect my answers/feedback will improve in time. At this point I have only been coached for several weeks.

Measurement tools. Global vision for future course of transition.

To look at things with the future in mind. To be mindful of complacency.

Helped me to become a better leader by giving me a better understanding of my strengths and weaknesses. It has caused me to add several new tools to my management tool chest (DISC, BEE, Strategic Planning, etc.)

Day to day dealing with employees.

Broad perspective of how decisions (good or bad) effect the whole company.

Internal conflict resolution

Discussion of things that you already know and learning how to rethink the impacts of growing them to make positive interactions with others.

Accountability to decisions and planning; viable sounding board on major decisions; role-playing people interactions scenarios (contract negotiation, interviews, conflict resolution, etc.); personal development (language skills, tackling areas I have blinders on, etc.)

I have realized some areas in my style and approach regarding certain situations that needed to be changed. I feel that coaching has helped me become more effective over the past few years.

Case Studies

NATIONAL MARKETING ORGANIZATION, 10 MILLION IN SALES

OPPORTUNITY/PROBLEM

This company hired a new CEO from a background of Fortune 500 size companies. He initiated a very comprehensive and expensive marketing campaign that led to huge debts for the company. He also created a well-meaning agenda to convert the company to his own vision.

ENGAGEMENT

Broad Insights conducted an analysis of the operational and financial situation, which revealed that their path was not affordable or sustainable. We helped the founder and owner return to CEO and restructure the organization.

RESULTS

With assistance from Broad Insights, the business turned around from a loss of \$600,000 the year prior to coaching to a positive profit of \$600,000 in the first year, \$1.2 million in the second year, and over \$2 million in the third. Key elements to achieving these results were financial analysis, clarifying the vision of the owner and founder, and recognizing that he needed to maintain steering control of the business.

\$50 MILLION DISTRIBUTOR IN SE USA, PROFITABLE AND GROWING

OPPORTUNITY/PROBLEM

The new CEO of this company inherited ownership from the previous generation, but with his technical background, needed help growing into the leadership role. As he adjusted to his new position, the employees felt uninformed and tension grew between the sales force and support teams.

ENGAGEMENT

With consistent coaching, the CEO became better at delegating, solidified the support and sales teams, and made personnel changes to improve quality of management. He began to measure employee engagement and saw significant improvement in employee morale, sense of understanding the company, and unity between internal and external teams.

RESULTS

The company enjoyed double digit growth during our Broad Insights coaching while improving employee engagement and management effectiveness.

\$8 MILLION MANUFACTURING ORGANIZATION

OPPORTUNITY/PROBLEM

This company offered great quality products and good customer service, but lacked energy, retained marginally effective employees, and had been stagnant for years.

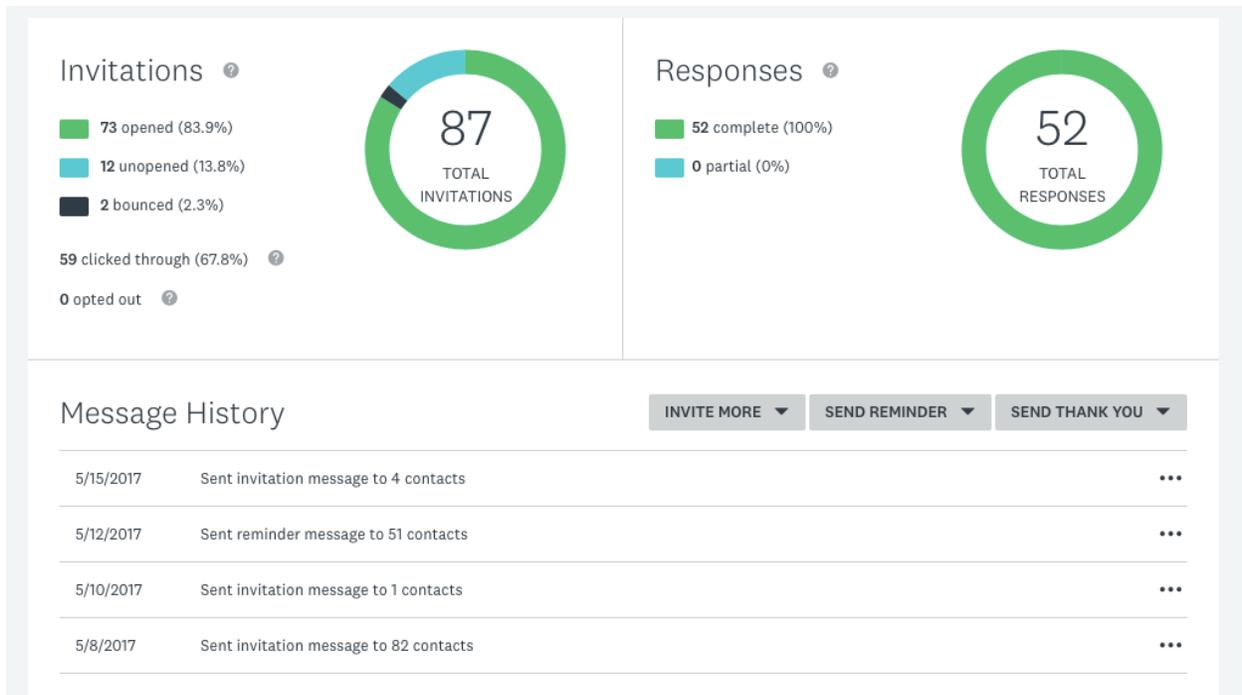
ENGAGEMENT

Broad Insights coached the president and chief shareholder, later adding a fractional chief sales officer.

RESULTS

With coaching the company began to see improvements in internal accountability, directional clarity, and management effectiveness. The fractional chief sales officer helped the team start prospecting and enhanced customer service, which led to double digit growth in sales and profitability in 2017. Through aggressive personnel management and efficient internal operations, the company has seen 10X growth over last year's profitability.

Statistics regarding response rates



NPS (net promoter score) benchmarks

Current NPS[®] Benchmarks for B2B Firms

The Inavero satisfaction benchmarks for all B2B industries were set using a study conducted in-house utilizing respondents from an independent third party panel sample provider. To qualify for the study the respondents had to play a part in the relationship with the B2B service provider so they could accurately portray their satisfaction.

	Net Promoter Score	Average Score	% Promoters	% Passives	% Detractors
Accounting	18%	7.67	43%	32%	25%
Architecture	32%	8.08	48%	37%	16%
Building Services	1%	7.35	33%	35%	32%
Business Consulting	30%	8	48%	35%	17%
Commercial Banking	19%	7.78	42%	34%	23%
Commercial Construction & Remodeling	18%	7.72	36%	47%	18%
Commercial Real Estate Broker	31%	7.95	49%	34%	17%
Credit Union	38%	8.31	51%	36%	13%
Employee Relations & Management	18%	7.61	41%	36%	23%
Engineering (not technology related)	24%	7.89	43%	38%	19%
Insurance	18%	7.71	41%	36%	23%
Legal	17%	7.68	40%	37%	23%
Manufacturing	27%	7.9	42%	44%	14%
Marketing/Creative Agency	15%	7.64	41%	33%	26%
Staffing	4%	7.4	29%	45%	25%
Technology Consulting Services	17%	7.63	38%	42%	21%
Technology Services Provider	14%	7.62	36%	41%	23%

Net Promoter Score[®] offers a single metric to measure satisfaction and compare your firm's service quality against competitors' and even across industries. [Learn more about NPS](#)—“the one number you need to grow.”



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List of respondents

Email ¹	Sent	Responded
Client 1	Yes	No
Client 2	Yes	Complete
Client 3	Yes	No
Client 4	Yes	Complete
Client 5	Yes	Complete
Client 6	Yes	No
Client 7	Yes	Complete
Client 8	Yes	No
Client 9	Yes	Complete
Client 10	Yes	Complete
Client 11	Yes	No
Client 12	Yes	No
Client 13	Yes	No
Client 14	Yes	Complete
Client 15	Yes	No
Client 16	Yes	Complete
Client 17	Yes	No
Client 18	Yes	Complete
Client 19	Yes	Complete
Client 20	Yes	Complete
Client 21	Yes	Complete
Client 22	Yes	No
Client 23	Yes	Complete
Client 24	Yes	Complete
Client 25	Yes	Complete
Client 26	Yes	Complete
Client 27	Yes	Complete
Client 28	Yes	Complete
Client 29	Yes	Complete

¹ Email addresses redacted to preserve client confidentiality.

Email ²	Sent	Responded
Client 30	Yes	Complete
Client 31	Yes	No
Client 32	Yes	No
Client 33	Yes	No
Client 34	Yes	No
Client 35	Yes	No
Client 36	Yes	Complete
Client 37	Yes	No
Client 38	Yes	Complete
Client 39	Yes	No
Client 40	Yes	No
Client 41	Yes	Complete
Client 42	Yes	No
Client 43	Yes	Complete
Client 44	Yes	Complete
Client 45	Yes	Complete
Client 46	Yes	Complete
Client 47	Yes	No
Client 48	Yes	Complete
Client 49	Yes	No
Client 50	Yes	No
Client 51	Yes	No
Client 52	Yes	Complete
Client 53	Yes	No
Client 54	Yes	Complete
Client 55	Yes	Complete
Client 56	Yes	Complete
Client 57	Yes	Complete

² Email addresses redacted to preserve client confidentiality.

Email ³	Sent	Responded
Client 58	Yes	No
Client 59	Yes	No
Client 60	Yes	Complete
Client 61	Yes	No
Client 62	Yes	No
Client 63	Yes	No
Client 64	Yes	Complete
Client 65	Yes	Complete
Client 66	Yes	Complete
Client 67	Yes	Complete
Client 68	Yes	Complete
Client 69	Yes	No
Client 70	Yes	No
Client 71	Yes	No
Client 72	Yes	Complete
Client 73	Yes	Complete
Client 74	Yes	Complete
Client 75	Yes	No
Client 76	Yes	Complete
Client 77	Yes	Complete
Client 78	Yes	Complete
Client 79	Yes	No
Client 80	Yes	Complete
Client 81	Yes	No
Client 82	Yes	Complete
Client 83	Yes	Complete
Client 84	Yes	Complete
Client 85	Yes	Complete
Client 86	Yes	Complete
Client 87	Yes	Complete

³ Email addresses redacted to preserve client confidentiality.

Responses to questions about magnitude of changes for six major areas

Customer satisfaction

Customer satisfaction changes directly attributed to coaching (values given = -1 deterioration; 0 = no change; 1 = minimal improvement; 2 = significant improvement; 3 = radical improvement)

Minimal improvement	1
Significant improvement	2
Radical improvement	3
Minimal improvement	1
Minimal improvement	1
No change	0
Minimal improvement	1
No change	0
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	3
Significant improvement	3
No change	0
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Significant improvement	2
No change	0
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Radical improvement	3
No change	0
Minimal improvement	1
Minimal improvement	1

Significant improvement	2
Significant improvement	2
Significant improvement	2
No change	0
Radical improvement	3
No change	0
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Significant improvement	2
No change	0
Significant improvement	2
Average	1.432

Employee engagement

Employee engagement changes directly attributed to coaching (values given = -1 deterioration; 0 = no change; 1 = minimal improvement; 2 = significant improvement; 3 = radical improvement)

Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
No change	0
Deterioration	-1
Significant improvement	2

No change	0
Significant improvement	2
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Radical improvement	3
Significant improvement	2
Minimal improvement	1
Radical improvement	3
Significant improvement	2
Significant improvement	2
Significant improvement	2
Radical improvement	3
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
No change	0
Radical improvement	3
Significant improvement	2
Significant improvement	2
No change	0
Significant improvement	2
Average	1.674

Financial results

Financial results changes directly attributed to coaching (values given = -1 deterioration; 0 = no change; 1 = minimal improvement; 2 = significant improvement; 3 = radical improvement)

Significant improvement	2
Minimal improvement	1
Radical improvement	3
Minimal improvement	1
Significant improvement	2
No change	0
No change	0
Minimal improvement	1
Minimal improvement	1
Not applicable	
Significant improvement	2
No change	0
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
No change	0
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
No change	0
No change	0
Minimal improvement	1
Significant improvement	2

Significant improvement	2
No change	0
Minimal improvement	1
No change	0
No change	0
Average	1.146

Short-term decision-making

Short-term decision-making changes directly attributed to coaching (values given = -1 deterioration; 0 = no change; 1 = minimal improvement; 2 = significant improvement; 3 = radical improvement)

Significant improvement	2
Minimal improvement	1
Radical improvement	3
Radical improvement	3
Radical improvement	3
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Significant improvement	2
Minimal improvement	1

Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Significant improvement	2
No change	0
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
No change	0
Minimal improvement	1
Radical improvement	3
Significant improvement	2
Significant improvement	2
Significant improvement	2

Average **1.75**

Strategic clarity

Strategic clarity changes directly attributed to coaching (values given = -1 deterioration; 0 = no change; 1 = minimal improvement; 2 = significant improvement; 3 = radical improvement)

Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
No change	0
Significant improvement	2

Significant improvement	2
Significant improvement	2
Radical improvement	3
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Radical improvement	3
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Significant improvement	2
No change	0
No change	0
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Minimal improvement	1
Significant improvement	2
Minimal improvement	1
Minimal improvement	1
Minimal improvement	1
Significant improvement	2
Significant improvement	2
Significant improvement	2
Radical improvement	3
Significant improvement	2
Minimal improvement	1
Average	1.67

Minimal improvement	1
Significant improvement	2
Average	1.83