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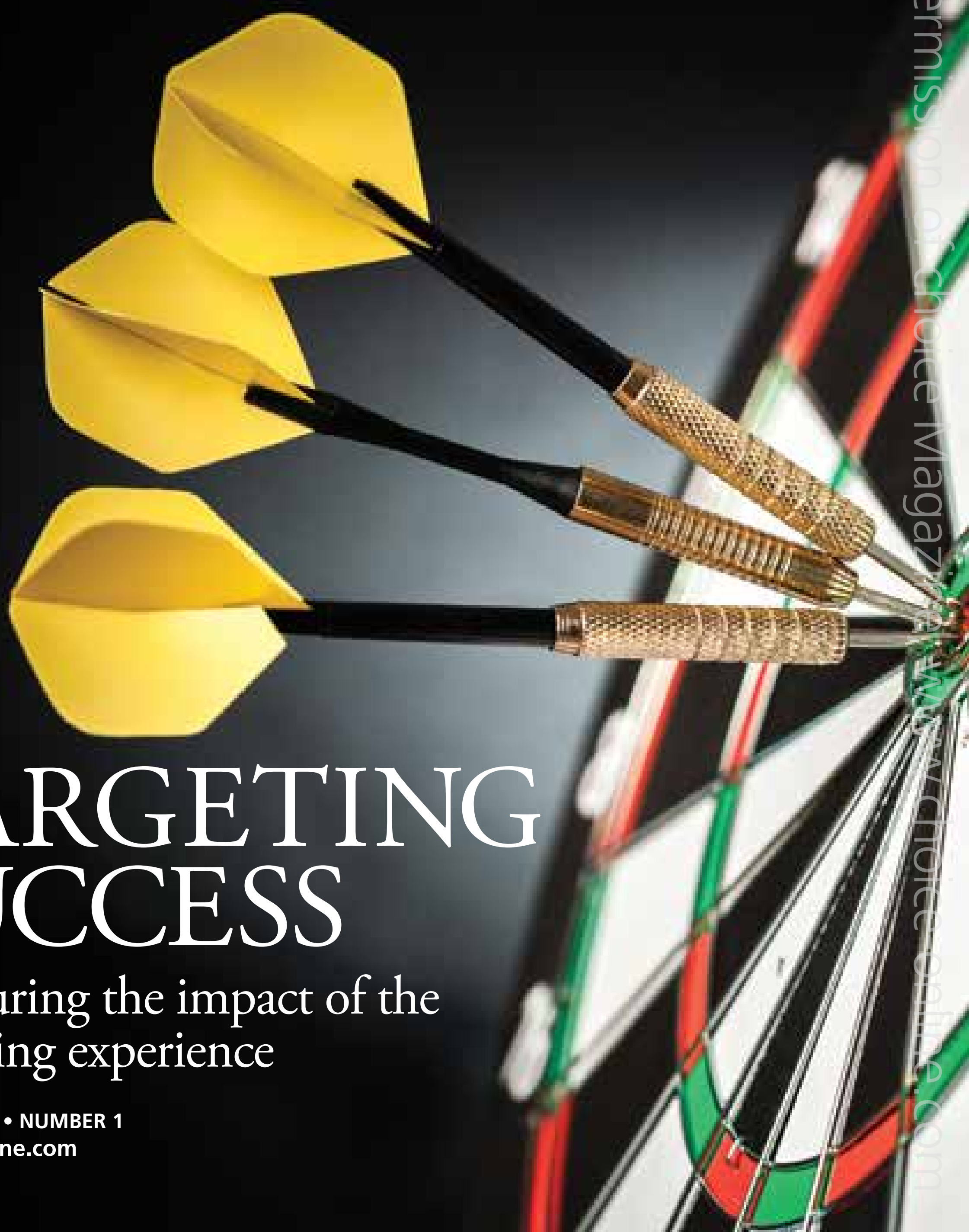
WHY DO WE COACH?
And how do we know if it's working?

EVIDENCE-BASED COACHING PRACTICES
Assessment tools based on firm evidence



TARGETING SUCCESS

Measuring the impact of the coaching experience

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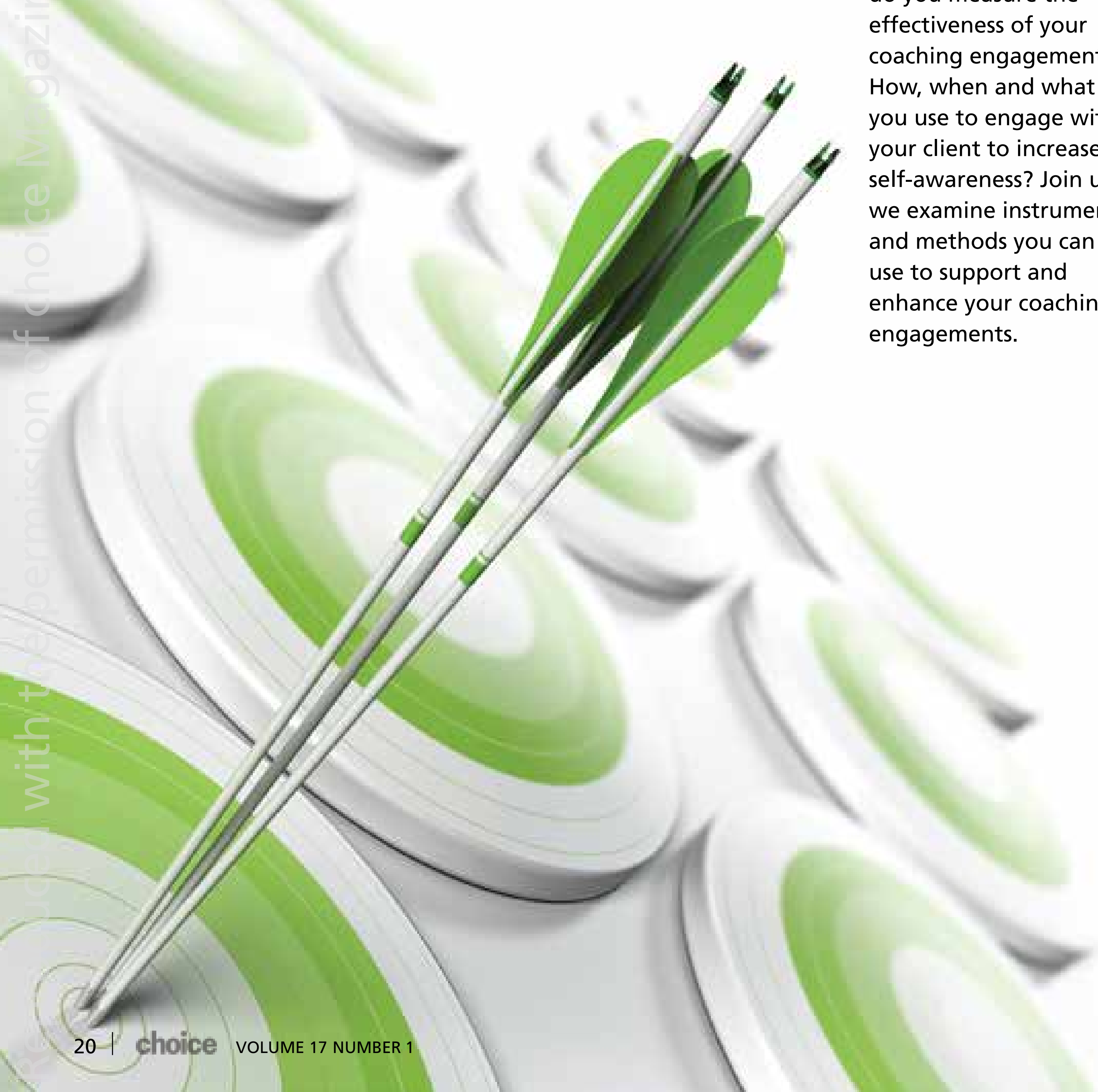
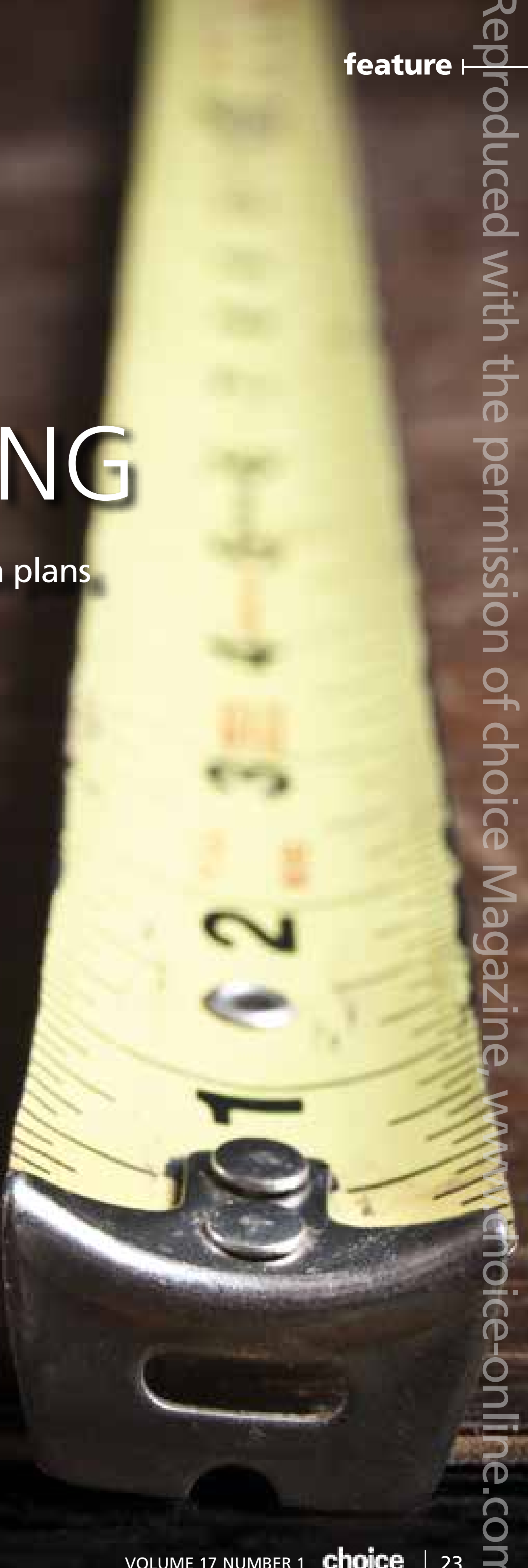
TARGETING **SUCCESS**

Measuring the impact of the coaching experience

You can't know how far you or your client has come, or needs to go, unless you measure along the way. Instruments today can assess the client and the coach. What are the different types of tools available and what are they used for? How do you measure the effectiveness of your coaching engagement? How, when and what do you use to engage with your client to increase self-awareness? Join us as we examine instruments and methods you can use to support and enhance your coaching engagements.



CREATING **CUSTOM MEASURES** FOR COACHING



How to track clients' progress on action plans

By Terry H. Hildebrandt, PhD, MCC, MCEC

New coaching clients often ask me how we will track or measure progress during their coaching program. I always let them know that we will create the measures together.

Since coaching is such a personal and customized process, the system of tracking progress against the client's goals also needs to be customized and specific to the client's context, objectives, and actions.

Below I show a step-by-step approach to creating customized measures and targets for any set of goals, and the actions required to achieve those goals.

DEFINE THE GOALS

Goal setting is the first step. Goals are also known as objectives, development areas, or areas of focus. The coach needs to work with the client to understand what changes they are seeking in their life or work.

Writing down the goals helps clients get clear on what they want to achieve in the coaching program. Goals are often unclear when the coaching engagement begins. Questionnaires, reflection, and visioning can help to support the client in defining the goals.

For example, a leader might want to have more influence in their organization. After conducting several stakeholder interviews, the coach reports back to the client that political savvy is needed. The client decides to develop political savvy with their coach. The client also wants to improve their overall health, which becomes a second goal for the coaching program.

CREATE ACTIONS TO ACHIEVE THE GOALS

Once the goals have been decided, the next step is to create specific actions to achieve each of the goals. Actions are created by the client, and the coach can often help brainstorm possibilities.

If the coach is not an expert in the topic of the goal, the client may wish to search out additional resources, such as a book, internet blogs, professional experts, colleagues, or mentors to come up with specific actions.

In some cases, the coach might want to refer the client to another coach that specializes in the area of interest. In this case, a wellness coach or leadership coach might be helpful. Alternatively, the coach might reach out to their own network for best practices.

Ultimately, the process of defining actions is owned by the client.

> [Once the goals have been decided, the next step is to create specific actions to achieve each of the goals.]

CREATE MEASURES OF SUCCESS FOR EACH ACTION

For each action, the coach and client work together to determine what measures would be most helpful for the client. Measures are not always numeric in nature. They may be "completion criteria" such as when the action will be completed; they may also be in the form of "proof points," which are specific outcomes or deliverables that can be verified.

Using self-assessment of progress (such as a 1-5 scale) or asking others for feedback can be very helpful for some actions, especially if the actions are subjective and qualitative. Defining measures is as much an art as a science in most cases.

There are powerful questions that a coach can ask when designing measures for actions.

- How will you know when you have made progress on this specific action?

ACTION PLAN WITH MEASURES AND TARGETS

GOAL	ACTIONS	MEASURE (PROOF POINTS)	TARGET	TRACKING PROGRESS
Develop Political Savvy	• Understand interests of key players • Build allies through developing relationships • Create a political strategy	• Create a map listing all the key players and their core interests • Self-assess the quality of the relationship on a monthly basis (use Red, Yellow, Green assessment) • Create a plan to address how to have more influence • Reviewed with mentor • Self-assess progress on a 1– 5 scale	• Map completed by Jan 15 and reviewed with Mary • 95% of key relationships are moved to Green in 6 months • 4 or 5 rating for every key plan	• 50% complete • Met with 10 key players • 50% Green • 4.5 average
Improve Overall health	• Change diet • Exercise 3 days a week • Get annual check-up • Work with a Wellness Coach	• Weight Loss • Caloric Intake • Steps Counted • Exercise Log • Doctor visited • Meds adjusted • Value of Coaching Sessions. • Self-assess on 1-10 scale. • Log of Goals achieved.	• Lose 20 lbs. by May • Maintain 1,800-calorie diet 90% of the time • 8,000 steps a day • 10 sessions a month • Physical completed annually • Medications adjusted at least annually • See coach once per month or 12 times per year • Score 9.0 average for rated sessions	• Lost 10 lbs. in first 2 months • 7,500 steps over last month • 8 sessions over last month • Doctor visit complete and meds adjusted • Sessions going well – 9.3 so far over 3 months and 3 sessions

- What proof points will be evident as you work on this action step?
- What outcomes would you like to see as a result of the action step?
- What would success look like or feel like if you finished this action step?

CREATE TARGETS FOR EACH MEASURE

Once the measures are created, the next step is to define targets for each measure. The targets are specific milestones that occur at a specific time, frequency, or quality level.

For example, in our case study, the executive who wants to exercise regularly has set a target of 8,000 steps a day and 10 sessions at the gym per month.

Regarding the political savvy goal, the client wants 95 percent of their key stakeholder relationships to be evaluated as Green in six months. The client is tracking those relationships in a table offline while working to build these relationships. (See sidebar at left for other key goals, actions, measures, and targets).

REGULARLY CHECK-IN ON PROGRESS

Measures are useful only if the coach and client check-in regularly to document and reflect on progress. I highly recommend at least a monthly check-in for the Action Plan.

The last column in the plan is a place for the client to document progress and capture key insights, learnings, issues, and successes throughout the coaching engagement.

The client and coach can make real-time adjustments to the Action Plan as the client develops greater self-awareness of what works and does not work for them. New action steps can be added if needed and measures refined.

The coach may also want to add additional columns to the Action Plan to capture Support Needed or Barriers to Overcome. Using an Action Plan also has the benefit of the client celebrating their achievements over time and keeping a record of the effectiveness of the coaching engagement.

I also recommend that the client continues to use the Action Plan tool after the coaching program ends to maintain accountability for sustained results and performance.

SUMMARY

Measures can be created for any client goal. The collaborative process of creating an Action Plan that includes goals, actions, measures, and targets can support a client in creating a roadmap for success.

Using a well-designed Action Plan builds clarity, confidence, and accountability into the coaching engagement. Clients and coaches can use the reflection process of tracking progress to make course corrections and refine Action Plans to improve the likelihood of success in meeting the client's goals.

At the end of the coaching engagement, the client has a record of accomplishments to celebrate success and to document progress to other stakeholders if needed. •

> [Writing down the goals helps clients get clear on what they want to achieve in the coaching program.]