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Transforming LIVES

How measuring impacts coaching

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Transforming LIVES

How measuring impacts coaching

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 either the client or the coach's progress and determine the gaps that can be further developed and the successes to be celebrated. 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? When do you use these measurement instruments? Join us for this exciting exploration.

ROI: The Big Question

Demonstrating the true value and impact of team coaching

By Michelle Chambers, MEd, CTPC, CHRL, CTDP & Evelina Rog, PhD, ACC

"How will we measure the impact of the team coaching?" That's the inevitable question leaders, sponsors, and/or HR almost always ask us. This is the moment the intricate dance begins of educating leaders on the tangible and intangible impacts of team coaching and negotiating the investment in effective assessment and evaluation.

Clarity and alignment are critical around the outcomes that are required, needed or desired by – or for – the client, so if the question is not asked, we initiate it during the discovery and contracting phases. Team coaching is still considered a newer and evolving field, and how best to evaluate and demonstrate its impact continues to evolve.

We see the purpose of measurement in team coaching as not only to demonstrate impact, but also to focus the coaching on developing awareness and capacity in relation to meaningful goals that are aligned with or directly support business priorities.

INCREASING SELF-AWARENESS & CAPACITY

In team coaching, we refer to the system or the team itself as "the client." With awareness comes choice, and when the client makes wiser choices, change starts to take shape. Thus, increasing the team's awareness and capacity is a primary goal, and we categorize the methods available according to the phases of team coaching: Beginning, Middle, End, and Follow-Up.

Beginning

Team effectiveness should address both opportunities within the team to improve and the stakeholders that are impacted by the work of the team. Prior to or at the start of the engagement, assessments (team diagnostics) can be used to help the team understand its current and required state, for example: team dynamics, whether the team has a sound structure, the quality of relationships between the team and its stakeholders, what stakeholders expect of the team, etc.

Interviews might be conducted with individual team members, and in some cases, the team's key stakeholders, to gather information about the team's processes, strengths, challenges, how the team is perceived, etc. Gathering information about the team's business priorities and checking to see if there is alignment is also key.

Middle

Throughout the team coaching engagement, team coaches use a number of tools to foster awareness and development, to identify gaps, and to celebrate success along the way. We regularly share our observations and "reflect back" to the team what we see to help them gain insight into their behaviours and patterns.

We pause to attend to the team's "process" to build their capacity for self-reflection. Structures such as team norms are often introduced and regularly revisited to help the team align, commit, and hold itself accountable to behaviors that they have agreed will support their effective functioning and development. As well, Lands Work, organizational mirroring and systemic constellations can also be used to help a team understand more about members' perspectives around their current state and what they need in order to move towards a desired state.

In addition to any assessments conducted pre and post team coaching engagement, sometimes we use a psychometric instrument during the team coaching engagement to develop collective skills and a shared language that supports a specific team development goal. For example, we have used tools like the Birkman, the Thomas Kilman conflict mode, or the EQi 2.0 to build the team's emotional, relational and conflict skills so that they can break down siloes and engage in collaborative problem solving.

Team-level debriefs involve generative dialogue that helps the team see its patterns in action and apply this learning in their day-to-day interactions. Other tools like storytelling, appreciative inquiries, "weather" metaphors, polls and ratings scales related to particular team performance indicators also help a team gain greater clarity and assess their progress.

To further embed learning into their day-to-day, we foster rich learning environments. To gauge ongoing progress and help the team to engage in dialogue, we build in process checks and after-action reviews. Key questions are asked, such as: "What is your key learning? What are you going to do differently to support the team? What are you noticing about this team? What do you want to address in the next team coaching session? What have we done well collectively?

At the end of each team coaching session, we may ask the team to identify what they will put into practice before the next session and ask each individual to share their commitment. They are then encouraged to meet in learning pairs or triads to share their learning and hold each other accountable.

End

We've come to believe that no high-performing or value-creating team exists that does not continually focus on its own process and growth. At the end of a team coaching engagement, having the team engage in a retrospective reflection on the team coaching journey and what has been accomplished as a result is not a destination.

It is a powerful opportunity for the team to harness its collective awareness about what is different about how the team is thinking, doing, and being, and to cement their commitment to continuing their journey. Thus, a planned retrospective session is scheduled, which may include conducting a formal post-assessment utilizing the same assessment and/or interviews used as the pre-assessment.

Follow-Up

Progressive teams may also elect to do a "team health check" one year post coaching to evaluate their own sustainable behaviours and team practices over time.

MEASURING EFFECTIVENESS

Before we can determine how we will measure the impact of team coaching, we need to identify what needs to change or be achieved. Preliminary conversations with the sponsor or team leader, a needs assessment, existing data, or one of the first team coaching sessions should uncover the broader business priorities, any changes in internal or external stakeholder expectations, systemic challenges in the system, or a shifting external landscape that requires the team to function differently. The output of this discovery phase may translate into a goal like service delivery transformation or the execution of a digital strategy for which measures of results can be identified.

Isolating the factors that will best contribute to the achievement of business goals can be challenging. Return on investment (ROI) is the ideal valuation of team coaching as it goes beyond the traditional levels of evaluation as suggested by Kirkpatrick (i.e., reaction, learning, action and business impact). According to Jack Phillips, ROI objectives set the acceptable level of monetary benefits versus costs of the program and may be expressed as an ROI percentage, a benefit-to-cost ratio, or a timeline for payback. For example: achieve at least a 20 percent return on investment within the first year, realize a payback within six months etc.

"Return on Expectations" is another way to measure the effectiveness of team coaching. This may involve the team setting its own team goals and assessing how well they did in achieving them. For example, a newly integrated team that needs to collaborate across pre-existing siloes to enable service delivery transformation will define in behavioral terms what the ROE will be if they operate as "one team" as a strategic partner to the business.

Pre and post team coaching assessments using the same team diagnostic tool are frequently used to assess a team's current reality and to measure the impact of team coaching. There are many valid and reliable assessments such as the Team Connect 360 (AOEC/Renewal Associates); The Team Diagnostic Survey (The 6 Team Conditions) and the Team Diagnostic Assessment (Team Coaching International). All of these assessments measure a team's progress and journey towards being a more effective team and provide both qualitative and quantitative data.

Creating team awareness and collecting feedback to measure and assess the team before and after team coaching engagement reinforces the value and impact that team coaching contributes both to the effectiveness of the team and to the organization in achieving its business priorities. •