



SHRM

TALENT

CONFERENCE / AUG. 22-25
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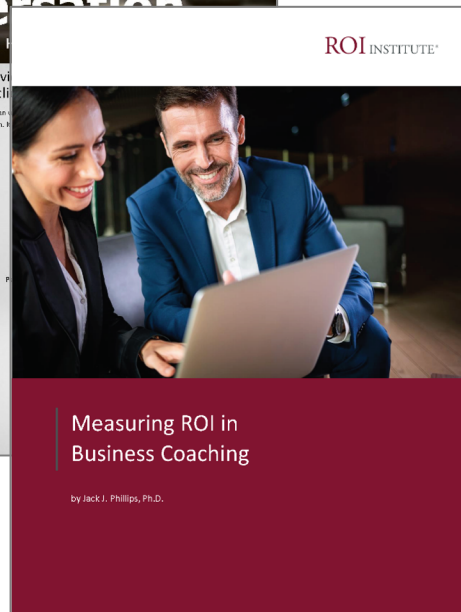
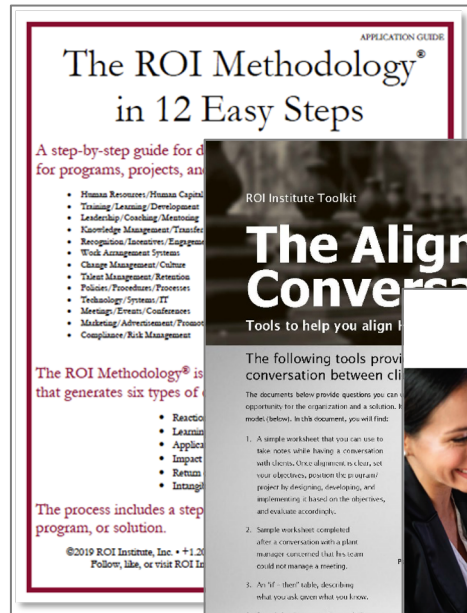
People, Performance & Power: Driving Behavior to Maximize Business Outcomes and ROI

Liz Pavese, Ph.D., Senior Behavioral Scientist, CoachHub

Patti P. Phillips, Ph.D., CEO, ROI Institute, Inc.

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Resources



Session Objectives

1. Define five levels of outcomes important to any talent solution.
2. Ask the right questions to align your talent development programs to the needs of the business.
3. Incorporate digital coaching to ensure results.



**How do you
define the
value of
coaching?**

The value of coaching



Individual



Team



Organizational



What does this value mean in terms of ROI?



“Even at the lowest estimate of 37% ROI, coaching would be well worth its investment”

Schermuly, 2019

37%

200%

570%

689%

Why is there so much variance?

1. Individuality of coaching processes
 1. Coaching ethics & confidentiality
 2. No one coaching is the same
2. Measurement challenges
 1. Bias of self-rating
 2. Timing of measurement
 3. Causal attribution
3. Metrics of success differ for organizations



“An overemphasis on financial returns can restrict coaches’ and organizations’ awareness of the full range of positive outcomes possible through coaching”

- Anthony Grant (2012)

Measures of Value

Levels of Evaluation	Measurement Focus	Typical Measures
0. Inputs & Indicators	The input into the project in terms of scope, volume, efficiencies, costs	Participants, Hours, Costs, Timing
1. Reaction & Planned Action	Measures participant satisfaction and captures planned actions, if appropriate	Relevance, Importance, Usefulness, Appropriateness, Intent to use, Motivation to take action
2. Learning & Confidence	Measures changes in knowledge, skills, and attitudes	Skills, Knowledge, Capacity, Competencies, Confidence, Contacts
3. Application & Implementation	Measures changes in behavior or actions	Extent of use, Task completion, Frequency of use, Actions completed, Success with use, Barriers to use, Enablers to use
4. Business Impact	Measures changes in business impact variables	Productivity, Revenue, Quality, Time, Efficiency, Customer Satisfaction, Employee Engagement
5. Return on Investment	Compares project benefits to the costs	Benefit-Cost Ratio (BCR), ROI%, Payback Period

What is ROI?

$$\text{BCR} = \frac{\text{Program Benefits}}{\text{Program Costs}}$$

$$\text{ROI} = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100$$

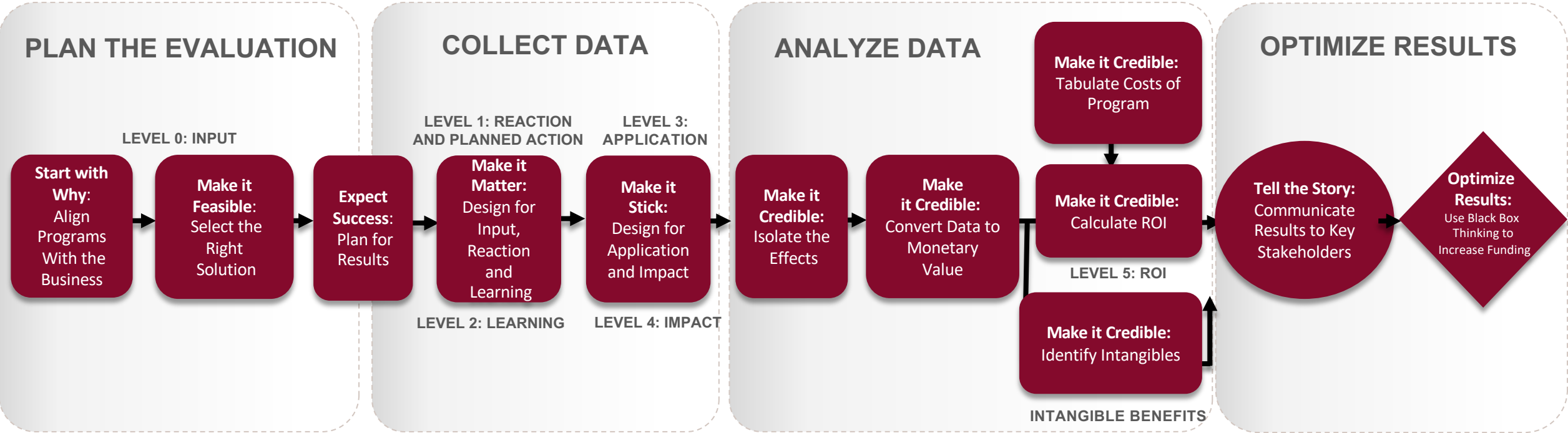
What is ROI?

$$\text{BCR} = \frac{\$750,000}{\$425,000}$$

$$\text{ROI} = \frac{\$750,000 - \$425,000}{\$425,000} \times 100$$

The ROI Methodology Process Model

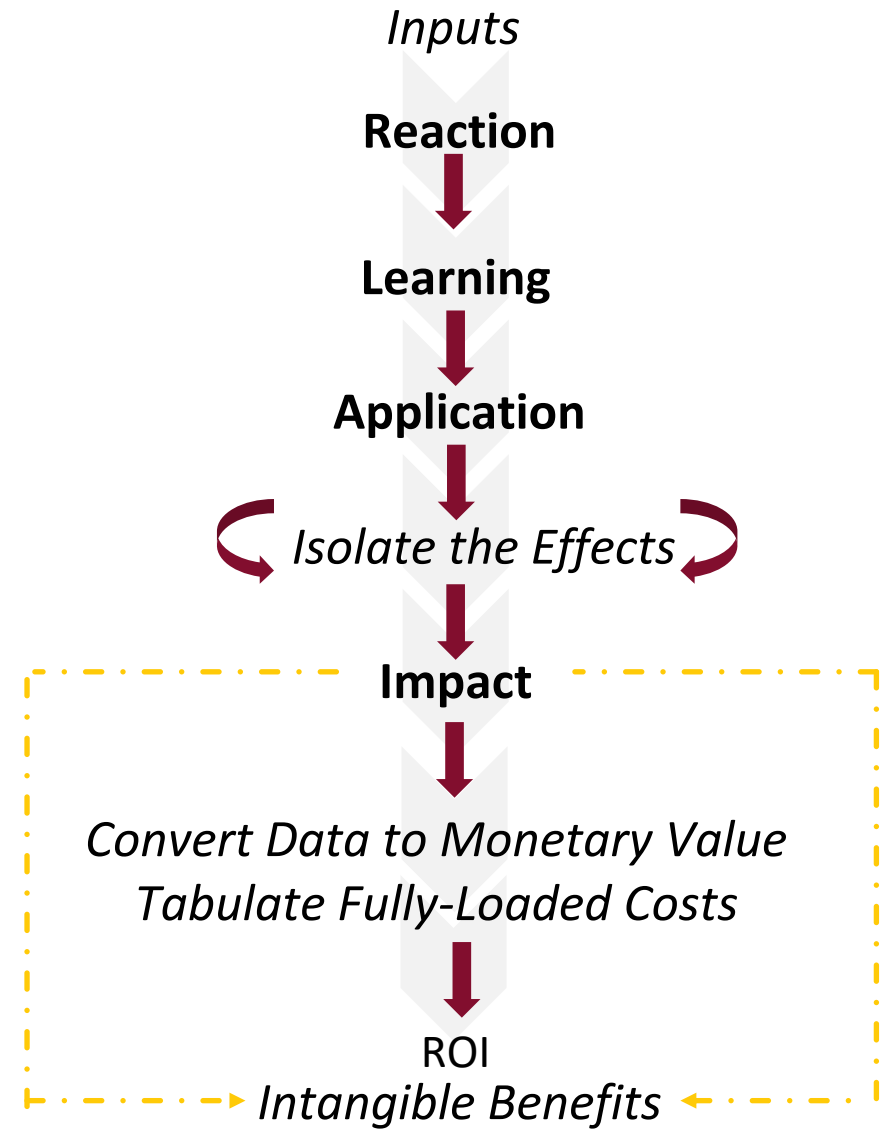
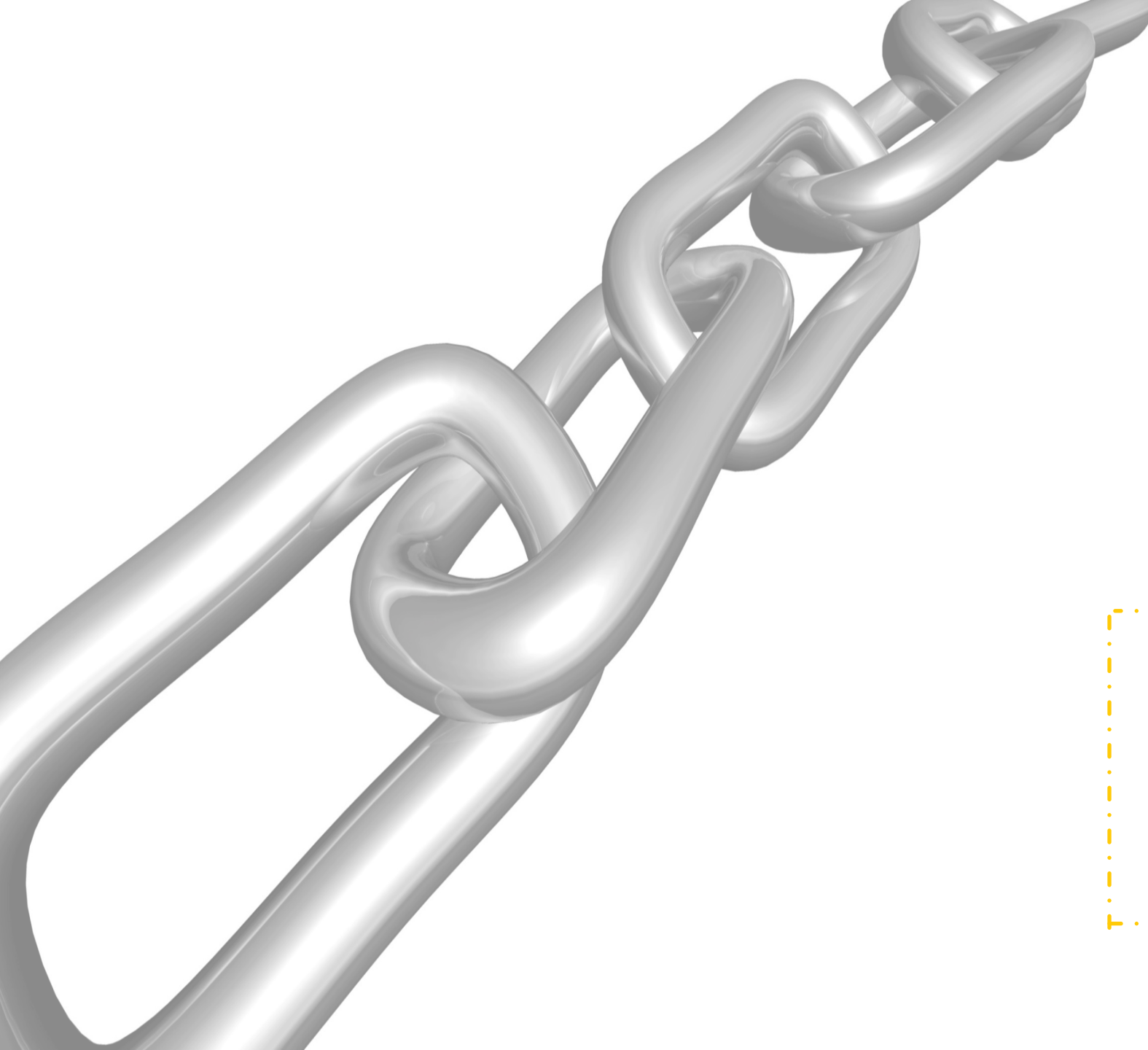
Designing for the Delivery of Business Results



Twelve Guiding Principles of ROI



1. When conducting a higher-level evaluation, collect data at lower levels.
2. When planning a higher-level evaluation, the previous level of evaluation is not required to be comprehensive.
3. When collecting and analyzing data, use only the most credible sources.
4. When analyzing data, select the most conservative alternative for calculations.
5. Use at least one method to isolate the effects of a project.
6. If no improvement data are available for a population or from a specific source, assume that little or no improvement has occurred.
7. Adjust estimates of improvement for potential errors of estimation.
8. Avoid use of extreme data items and unsupported claims when calculating ROI.
9. Use only the first year of annual benefits in ROI analysis of short-term solutions.
10. Fully load all costs of a solution, project, or program when analyzing ROI.
11. Intangible measures are defined as measures that are purposely not converted to monetary values.
12. Communicate the results of ROI Methodology to all key stakeholders.



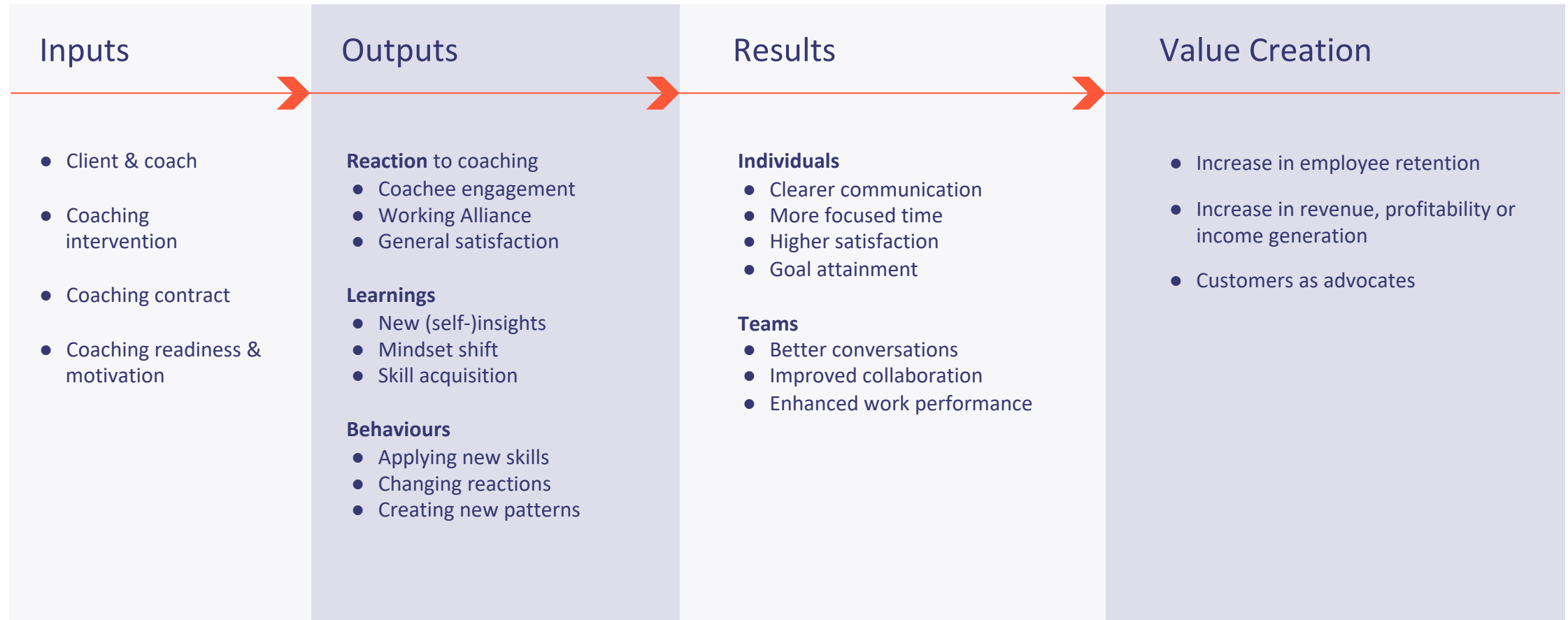


Our Mission

By democratizing coaching, we unleash the full potential of your people to drive the transformation of your business.

Reimagine People Development

What is part of the Coaching Value Chain?

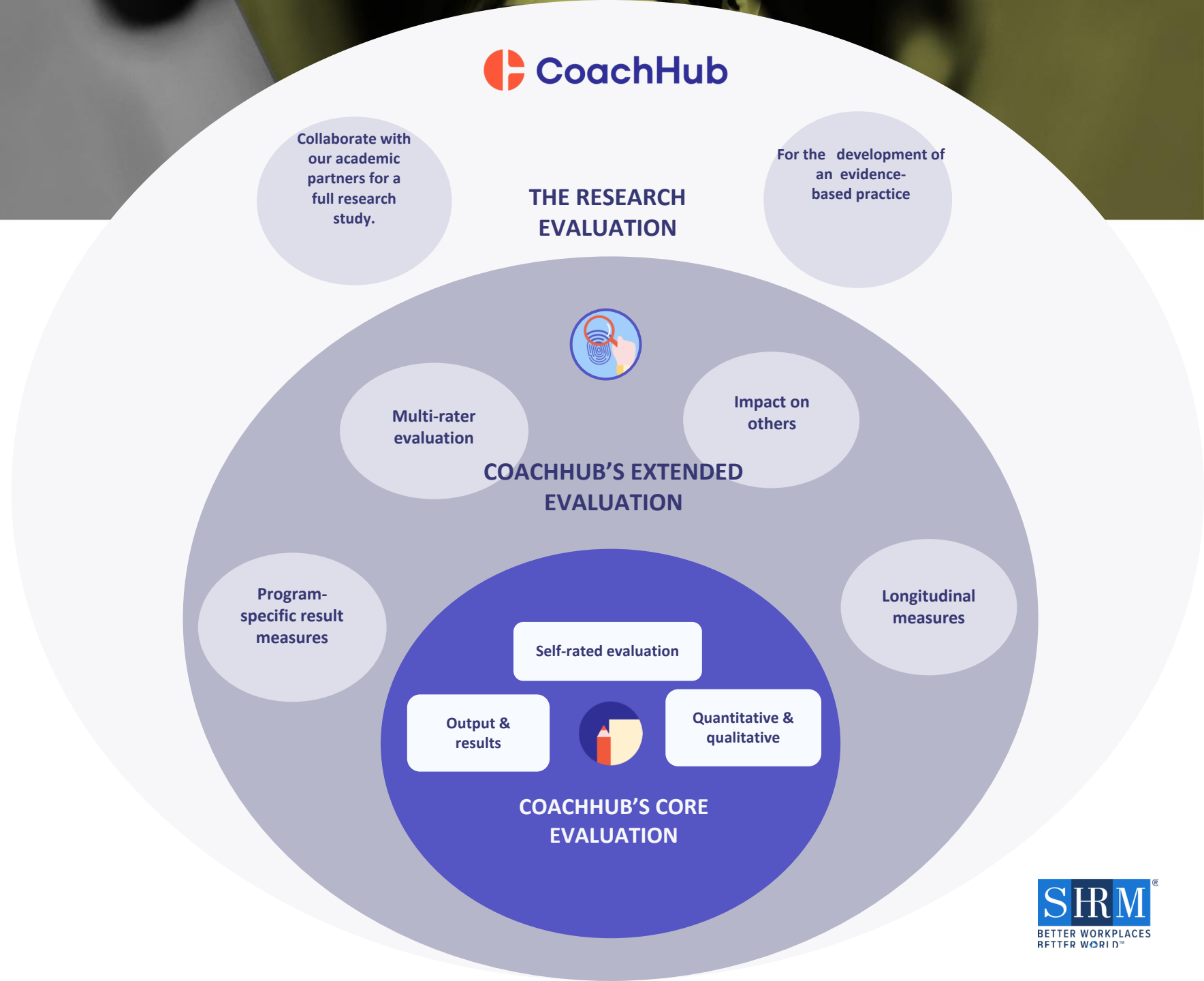




*In addition to a numerical outcome, or effect evaluation, it is important to look at a process evaluation - **what are the “influence of context and intervention processes on the outcomes”?***

(Nielsen & Miraglia, 2017)

CoachHub's 3-Tiered Evaluation Across the Value Chain



Depending on the use case we need different metrics and depths of analysis

Organization Change

Enhances
Current
Capability

- M&A and restructuring
- Roll out of new company values
- Organizational resilience during change
- Compensation and benefits
- DE&I

- New manager, first time leader transition
- 360 debriefs
- Performance management
- Trainees

- Digital / Agile transformation
- Coaching culture
- New work and learning culture
- Sales transformation
- Innovation and creativity

- High potentials
- Leadership development
- Role transition
- Career development



Builds Future
Capability

Employee Effectiveness

Beginning the Journey with Core Evaluation



x



CoachHub

Industry: Tobacco

Audience: Global program expanded over 1 year, reaching global leaders across 23 countries

Use Cases Leadership Development, Resilience & Wellbeing, Career transitions, etc.

Challenges: Psychological Safety, Sustainably support people development during the pandemic

89%

reported that the coaching has helped them achieve their goals

85%

have identified new steps to take in their professional development

83%

said they have tested new behaviors through coaching

82%

said that coaching has had a positive impact on their work environment

91%

reported that the flexibility in time and location provided an added value to them

90%

said they would recommend CoachHub to a colleague

Insights across the Coaching Value Chain



96%

Coaching
Relationship



90%

Coaching helped to achieve
goals



89%

Gained new perspectives



86%

Identified strengths and weaknesses



81%

Learned new competencies



79%

Integrated successful behaviors

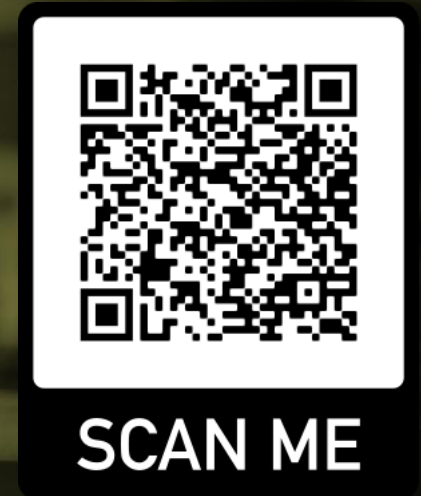
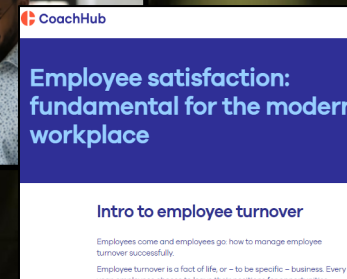
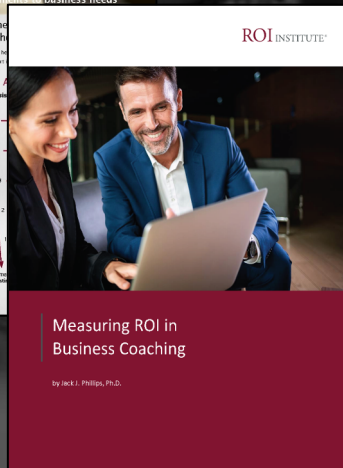
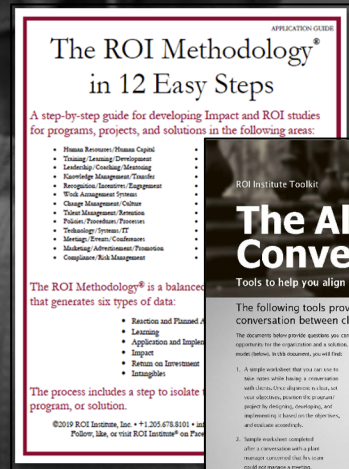


Key Points

- There are many measures to consider when determining value
- Impact and ROI are most meaningful measures to those investing in coaching, and only occurs when behaviors change
- Begin with the end in mind by setting your strategy to align your value measures
- Evidence of value is built over time and not about one number
- Organizational context is key

Click the link below or scan the QR code to access resources from today's session.

<https://roiinstitute.net/shrm-talent-conference-people-performance-and-power/>



ROI CERTIFICATION®

SCHEDULED EVENTS

August 23-27, 2021 — Salt Lake City, Utah

September 13-24, 2021 — Live Virtual

September 27-October 1, 2021 — New Orleans, LA

November 8-12, 2021 — Milwaukee, WI

January 10-14, 2021 — Focused on Healthcare

February 28-March 4, 2022 — Orlando, FL

WHAT IS ROI CERTIFICATION?

ROI Certification is a globally renowned process focused on measuring the true value of tough-to-measure initiatives using the ROI Methodology®. Participating in ROI Certification is the most comprehensive way to gain the skills needed to evaluate major programs and to report the most credible results that drive organizational improvement.

Email: info@roiinstitute.net

Enroll: <http://bit.ly/ROICertification>

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- Sr. Behavioral Scientist, CoachHub
- Organizational Psychologist & Certified Professional Coach
- Member, Society for Industrial Organizational Psychology & International Coaching Federation
- Committee Member, SIOP Career & Professional Development for Practitioners
- Member and Mentor, Portland Women in Tech
- Conference keynote, session speaker, and webinar features at Human Capital Institute, Society for Industrial Organizational Psychology, HRD Connect, Achieve Engagement, HR Exchange Network, The Conference Board, Workforce Analytics & HR Data, SAP Sapphire, Limeade Engage, Qualtrics X4

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Visit www.coachhub.com to request
a demo

Patti P. Phillips, Ph.D.

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- Board Chair, Center for Talent Reporting
- Board of Trustees Member, UN Institute for Training and Research
- Board Member, International Federation of Training and Development
- Advisory Council Member, The Conference Board Human Capital Practice
- Fellow, ATD Certified Professional in Talent Development
- Author of 50+ books including *Measuring the Success of Coaching* (ATD Press), *Measuring Leadership Development* (McGraw-Hill), and *Making Human Capital Analytics Work* (McGraw-Hill)
- Educator, Consultant, Coach

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