

The Book Shelf:
Patricia Pulliam Phillips, Jack Phillips and Lisa Ann Edwards
Measuring the Success of Coaching: A Step-by-Step Guide for
Measuring Impact and Calculating ROI

Book Reviewed by Bill Carrier

This issue of The Future of Coaching covers a wide variety of perspectives on the return and outcomes of coaching, venturing from the ontological to the academic. The book we offer in this quarter's Bookshelf is the strongest and most comprehensive take on ROI in coaching we've seen, from the application to the theory. We'd highly recommend [Measuring the Success of Coaching: A Step-by-Step Guide for Measuring Impact and Calculating ROI](#).

Of course, it is written by the Phillips (Patricia Pulliam and Jack) in collaboration with Lisa Ann Edwards. In this book, the authors apply their process for the evaluation of ROI directly to coaching programs. Though written with slightly more focus on the evaluation of programs, there is much to offer coaches who do single coaching engagements and for smaller organizations. The recommended rigor scales well, because the philosophy and process don't change.

The bottom line is simple: ROI "stands for Return on Investment and is the ultimate measure of accountability....For every dollar invested in coaching, how many dollars were returned, above and beyond the investment?" The authors suggest an evaluation framework (conceptual model), a rigorous process, an integrated set of guidelines to support successful and uniform application of the process, and case studies.

Two themes strike me as useful to point out among the many valuable ideas in the book. The first is the importance of making careful and conservative claims for ROI. ROI is a financial measure, and though it often contains components open to interpretation, it also frequently contains many easily fact-checked or referenced details. Sloppy, incorrect, or deceitful business cases (whether you are a coach or a program manager) can be disastrous—and are, at the very least, poor support for good work.

As a leadership coach, I see another critical concern in the careful and conservative creation of ROI: Our work is built on the deep trust we earn with our clients. In our reporting of outcomes and ROI, we can add to that trust with precise, constructively reported ROI. We can also weaken or damage that trust by making exaggerated or unsubstantiated claims. Not only does the care of our ROI and outcomes reporting show the measure of our character and professionalism; our clients are also likely to feel (quite rightly) that their own reputations are accounted for and protected.

The second theme I'd like to highlight is importance of early planning in evaluation. When I was in the Army, an oft-repeated phrase was "proper planning prevents poor performance." In Measuring the Success of Coaching, there is a strong drumbeat of early preparation for more effective and more consistently useful outcomes. The authors suggest, for example, deciding not only on goals at the outset of a coaching engagement, but also on the measures that you will apply to the goals, the methodology you will use to collect and interpret the measures, and even the way you will report on the outcomes. More, the authors' suggestion to not just plan but also communicate and gain agreement on the measures, methods, and reporting, serve as a great reminder about buy-in from the client and the client's organization.

So what's the bottom line? Measuring the Success of Coaching is a solid work specifically geared for our profession. Consider including it among the foundational texts every organizational coach and every coaching program manager ought to have in their library.