

A Coaching Case Study

Transferring Learning To Habit

In The Canadian Financial Industry

Overview

Introduction The purpose of this case study is to provide evidence to suggest that coaching increases the likelihood of applying skills learned in a training program and positively impacts results.

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Author and Project Partners

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Libby McCready is the President of *Front and Center Communications Inc.* in Toronto Canada. She is a Certified Corporate Coach, Facilitator and Public Speaker.

Libby designed Transfer-to-habit™, the coaching program designed to have training ‘stick’ and be applied on-the-job.

Libby is obtaining her Masters Degree in Leadership and Training at Royal Roads University.

**SkillsPlus® and
Communicare**

SkillsPlus sales training is a skill-building seminar designed to provide sales people with insight into how customers see them and what to do about it.

Communicare is the exclusive distributor of SkillsPlus in Canada under license from the program’s developers, Psychological Associates, Inc. of St. Louis, Missouri, USA. Communicare is a Canadian consulting company serving Canadian business and government since 1978. Its focus is on providing effective interpersonal and written communications skills.

Client

The client is one of Canada’s largest Investment Banking firms. The participants are investment executives and spent 4 days in sales training (SkillsPlus) as part of their overall brokerage-licensing program. More than 100 participants were trained and coached over 9 months.

Abstract and Program Overview

Abstract This case study discusses the results of a post-training coaching initiative for participants of a sales training program. Specifically, this paper addresses the feedback from participants, pre and post coaching as to the results and value they attributed to coaching. Also addressed is a review of the strengths and limitations of the methodology and the next steps for this project.

Premise Research indicates that skills learned in a classroom environment are not used to their full capacity on-the-job. Baldwin & Ford (1988) and Broad & Newstrom (1992) have both conducted research in this area and have this to say:

"American industries annually spend more than \$100 billion on training...not more than 10% of the expenditures actually result in transfer to the job." (Baldwin & Ford)

"Most of the investment in organizational training...is wasted because most of the knowledge and skills gained...(well over 80 percent by some estimates) is not fully applied by those employees on the job. (Broad & Newstrom)

The premise for conducting this case study was to determine if coaching would impact the degree to which skills learned were then applied on-the-job.

Program Overview The logistical details of the training and coaching program were as follows.

1. One hundred participants in groups of 15 to 30 were trained in a four-day sales training program (*SkillsPlus*).
 2. Coaching began after 6-months of on-the-job application.
 3. The coaching program included two one-on-one sessions per month for three months.
 4. Coaching was conducted by telephone.
 5. Participants were assigned a coach and provided with materials to support them to determine what they wanted to achieve and how they would measure the effectiveness of coaching.
 6. Two group teleconference sessions occurred – one at the beginning of the program to answer any general questions and one at the end to obtain verbal feedback on the program.
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Research Methodology

Introduction This section describes the research conducted to determine the effectiveness of coaching.

Survey design:
Pre-coaching The pre-coaching survey was designed to establish the extent to which participants had been using the skills learned in training during the first six months on-the-job.

Specific questions were asked regarding the skills and models introduced in the classroom and participants answered the extent to which they did or did not use the skills.

Survey design:
Post coaching The post-coaching survey was designed to serve two purposes. It was to

1. benchmark the change in the extent of skills used from pre to post coaching, and
 2. gather feedback as to the measures of success and value of being coached.
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Distribution and tabulation On-line surveys were sent to all participants and tabulated based on the number of respondents.

Pre-coaching surveys were sent 2-weeks in advance of coaching.

Post-coaching surveys were sent 2-weeks after coaching was complete.

The response rate to both surveys was 49%.

Results

Introduction	This section describes the results of the research conducted.
Benchmark	<p>Pre-coaching research indicated 58.5% were using their skills either all or most of the time. This was surprisingly high relative to the premise set out in this study. Interestingly, the coaching process identified gaps between intended use of skills and actual use of skills (the extent to which they thought they were using their skills and actually using them).</p> <p>Post-coaching survey results provided evidence that coaching increased the use of skill by 11.5%.</p> <p>Post-coaching research indicated 70% were using their skills either all of the time or most of the time.</p>
Measures and value	<p>Measures of success were established individually between the participant and their coach. All coaching conversations were strictly confidential and thus reports were not generated to prove that success was achieved.</p> <p>Survey questions, however gathered anecdotal evidence to suggest specific measures were achieved. Individual examples of this evidence as well as the value participants claimed include</p> <ul style="list-style-type: none">• \$1.5 million in assets gathered• \$2.0 million in assets gathered• “I developed a greater perspective”• “I close my sales in half the time”• “I learned how to prioritize”• “I realized my own power in getting things done”• handling objections better, and• think through situations more.

Conclusions

Introduction This section makes assumptions based on the evidence gathered as to the value coaching provides as a follow up to training events. It also reviews the limitations of surveys as a methodology for determining measures of success.

Assumptions This study has provided an opportunity to measure the value of coaching as a follow up process to training events.

Evidence through survey data illustrates coaching can increase the application of skills learned to on-the-job application.

Anecdotal evidence suggests that individuals attribute successes to the experience of coaching. What is important to note here is that the measures of success were determined individually and not by the organization.

Limitations of surveys Coaching is a personal experience. Only the individual being coached can determine and articulate the value they received from coaching.

The quantitative aspects of the pre-coaching survey should not be taken at face value. Based on the coaching experience uncovering the gap between intended and actual use of skills it is likely that there is a flaw in the validity of the pre-coaching results.

Conclusions Coaching adds value to the organization in increasing the use of learned skills on-the-job. People coached claim to produce better results, be more focused and determined to perform to the best of their ability. Coaching supports the individual in a safe and trusting environment.

Organizations can benefit from adding coaching as a follow-up to training and should be flexible in supporting the individual to determine their own measures of success.

Organizations must be cautious of using surveys *only* to determine the effectiveness of training and must gather anecdotal evidence to determine the overall effectiveness of coaching as a support to training.
