COACHING METRICS: How to Quantify the Un-Quantifiable

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Coaching Metrics:
How to Quantify the Un-quantifiable

I wrote this e-book for the many coaches who are changing the world, one life at a time, and wondering how they could be better at making a living doing this. This book is for you if you want to have more confidence in your coaching, and you want your clients to recognize what they have accomplished in a very profound way. It will also help you articulate what you already know intuitively to people that you can help, so that they can easily become coaching clients.

As they say, “You don’t know what you don’t know.” How do you communicate the value of coaching to your prospective clients when ‘they don’t know what they don’t know?’ I have found a very simple way to do this that works easily and I want to share it with you.

Before I get to that, you may want to know a bit more about me and see the many ways that coaching metrics can help you and your business.

Why should you listen to me?

Just before I quit my job in Estate Planning, I was working 60 hours/week. Now there’s a metric that defies one of the major tenets of coaching: self-care! But I was successful. I dressed in business attire every day. I made the Million Dollar Round Table in my second year. I was making good money. I knew how to have success by working hard. And I was also exhausted.

At that time, I was very interested in my own self-development. I would hang out with a medicine woman on the weekends, and we would do healing ceremonies. This was back in the early 90’s, when Young Living Essential oils still came in cardboard boxes.

I read every self-improvement book I could get my hands on. I listened to Scott Peck, Carolyn Myss, and Wayne Dyer on cassette tapes as I was driving around in my car. I took meditation classes at Canyon Ranch.

My day job and my weekend interests were very separate in my mind. Although, I must admit, there were lots of times that my co-workers asked for my advice on life matters. And my friends sought my opinion on business matters routinely. But in my mind, there was a very clear separation between my self-development and my job.
I wanted that to change. I wished I could go to work each day and be who I really was. I wanted to wake up without an alarm, and wear comfy clothes to work, and really help people from my heart and soul.

I was burnt out. I was exhausted. I wanted success. But I wanted it with ease and joy, not with hard work and serious effort. I was not sure that I could have both. In fact, I was afraid that I could not.

I took the leap to become a coach in 2002, and I have never looked back. It worked! And I am able to tell you beyond the shadow of a doubt, it does work. I am living proof that you can have success with ease and joy.

Today, I am a six-figure coach. I live in one of the most prestigious areas in Tucson, Arizona. I belong to the country club. I wake up without an alarm each day and wear comfy clothes to work. I laugh a lot all day long. I help lots of people achieve their dreams. My life is integrated. I get to be myself in both my personal and professional lives. This is the beauty of being a coach.

To get to this level of success, I realized that traditional marketing and selling practices would not work for me. I had to find a way to translate the value of coaching to people who did not know much about coaching. This is where the metrics came in to my coaching practice.

I came from a background of estate and financial planning. When I began in the field, it was in a very typical way. All of the reps would sit in a conference room on Monday morning with a bunch of phones on the conference table. We were told we had to set 20 appointments each week. Statistically, if we set 20, then 15 of those people would keep their appointment. Of those 15, we would make 5 sales.

Well, in order to set 20 appointments a week, we had to cold-call at least 100 people. YUCK! And we could not leave the conference room until we had 20 appointments set. I remember one guy even slept overnight in the conference room because he could not set his 20 appointments in one day!

Now, there is something to be said about tracking numbers, but this process was so, well, COLD! I mentioned that when I came into coaching, that traditional marketing and sales techniques did not work for me. But I found out that numbers did work. I found out that tracking numbers in my coaching practice would help me in many ways.
Benefits of Tracking Numbers in Coaching

Much of the time, coaching involves a very intimate and even sacred conversation between a coach and a client. Even in business coaching, this depth is the hallmark of good coaching. The trick is: How do you measure the value of a transformation? How do you calculate the value of what did not happen as a result of staying healthy or creating a profitable business?

And how do we really measure the progress of our clients? Is it even necessary or important to do so?

I believe it is important to measure progress for a number of reasons:

First of all, the client is paying for a service, and even though we intuitively know that there is a huge return on their investment, it is good for them to know it, too. Numbers can help them to easily see their progress in a very tangible way.

Being able to quantify progress allows our clients to understand the value of their return on investment. It eases their mind, and encourages them to speak about their coaching experience in concrete terms. It helps them bring referrals to their coach.

For example, which statement do you think draws people in more?

1. I had a better relationship with my body, learned to listen to my inner voice, and became more fit and healthy.
2. I lost 25 pounds.

Both statements are probably true if the client lost all that weight. The numbers draw people in, though.

The second reason measuring is important is for you, the coach, to know that you have really helped someone. We know that mindset makes a big difference in creating concrete results, and we work on the inner game with our clients. Yet it is the solid changes that occur in the lives and businesses of our clients that they are seeking in coaching.

Being able to quantify these changes gives us more confidence as coaches, and allows us to overcome any gremlins or hesitations we have. And, yes, those gremlins come up for experienced coaches, too. Getting into the habit of measuring the return on investment of your coaching is a help to both coach and client.
The third reason it is a good idea to measure the progress in your coaching is that you can obtain very compelling testimonials. Here is another place where numbers will really help your practice.

For example, which statement sounds more compelling?

1. Our team was more cooperative, productivity increased, and turnover decreased.
2. We had a 15% increase in productivity and our turnover was reduced by 25%.

So now that I have made the case for quantifying results in coaching, you may be asking “how do we do that?” In business coaching, it is easier, as business can be more easily quantified. And yet there are still softer areas of life that are really important to measure, too. The process that I will take you through will work just as well for both.

The Keys to Coaching Metrics: Outcomes and competencies

This process begins with determining outcomes and competencies. A competency is an observable action that will lead to a certain outcome. Remember the metrics we used in financial planning? If we made 100+ calls per week, we would create 5 sales. Making the calls is a competency. Making the sales is an outcome. You have no control over an outcome, but you do over a competency.

When you determine the competencies (the observable actions that the client can take to get certain outcomes), and use a scaling approach, you can easily quantify the unquantifiable. The beauty of this approach is that the outcomes and competencies are determined by the client and the numbers are determined by the client, too. You are still using very pure coaching methodology.

Here’s how it works:

In your initial session with the client, ask them to identify the most important outcomes that they want to achieve through coaching. Tell them you want them to go forward 90 days, and look back. What would the results be that would tell them they received a fantastic return on their investment?

One thing I have found about clients – they will usually underestimate what is possible. So do not be afraid to ask them for a result that they would be elated with. Chances are very much in your favor that the coaching process will bring them the result they need and even more if they take the steps that they will outline for themselves.
Have them speak about 1-3 results that they want to achieve. For instance, let’s take the example above. The client determines that the desired outcomes are:

1. More team cooperation
2. Increased productivity
3. Decreased turnover

These are the outcomes they are looking for. Once they have determined these, next have them rate their current level in each of these desired outcomes, on a scale of 0-10, 10 being the highest. This is so that you have a baseline of comparison for their coaching progress.

Each of the outcomes will be agreed on and measured at the beginning of the coaching engagement. Once they have been determined, file the results away, and just focus on the next metric: the competencies.

The next step in our process is to have the client identify 5-6 competencies that they can take on a consistent basis that will help them reach each of the outcomes. This will provide a nice list of observable actions that can be measured on a weekly basis to make sure the client is on track.

For example, competencies for more team cooperation might be:

- Acknowledge team members who are cooperating by sending a note of thanks
- Publicly recognize team members who go out of their way to support others on the team
- Make the office a ‘no-criticism’ zone for the next 90 days
- Determine a reward system for those team members who are key to team harmony
- Implement one action each day that will support the team leader to step up to a new level of leadership

Competencies are measured on a weekly (or coaching session) basis. Outcomes are measured in a longer time frame. The time to measure an outcome is when the client has a successful result. Measure that outcome again by asking for a new current rating. Chances are good that they will rate it higher, and they will be able to see their progress in a very clear way.

At the completion of the coaching engagement, ask the client to do the rating on the outcome once more. You can then see that if the client went from a 5 to a 10 on any particular aspect, you can conclude that the client showed a 50% improvement or increase. It’s that easy.
This is also very beneficial if you want to work longer with the client. A client who can see a very concrete result from coaching is more prone to sign up again and again.

**Benefits of Coaching Metrics for Marketing Purposes**

Remember when I mentioned that I had to find a way of determining the value of coaching so that it could be used in a new way of marketing and selling? Well, having the numbers for your coaching engagements will allow you to have numbers in your testimonials.

For example, the leader whose team has gone from a “3” in cooperation to an “8” can say that in 90 days time, your coaching enabled him to increase the cooperation in his team by 50%. That is a number that would catch the attention of every team leader out there.

And there you have it. Quantifying the Un-quantifiable! It’s easy. It still has the client determining the outcomes and the competencies, so you are still clearly in the role of coach.

As a bonus, you will find ‘done for you’ forms at the end of this e-book to help you put this into practice with your own clients. Be sure to scroll down past my signature, and you will find them there.

I hope you have enjoyed learning about this process of quantifying the unquantifiable, and I know it will support you in your business in many ways. If you have any questions, send them to info@karencappello.com and we would be happy to answer them.

Love and Great Joy,
Coaching Metrics - Outcomes

Client Name: ______________________________________________________

Date: ____________________________________________________________

Outcomes

In the next 90 days, what are 3 outcomes you could achieve that would make this coaching engagement a very valuable return on investment?

1. _____  _______________________________________________________

2. _____  _______________________________________________________

3. _____  _______________________________________________________

Rate each outcome for a current baseline on a scale of 0-10 (10 being the highest).
Coaching Metrics-Competencies

Client Name: _________________________________________________

Date: _________________________________

Competencies

For each of these outcomes, what are 5 competencies (observable actions), when done consistently, that will make it highly likely that they are achieved?

1. ______________________________________________________________________

1) ____ ____________________________________________________________________

2) ____ ____________________________________________________________________

3) ____ ____________________________________________________________________

4) ____ ____________________________________________________________________

5) ____ ____________________________________________________________________

2. ______________________________________________________________________

1) ____ ____________________________________________________________________

2) ____ ____________________________________________________________________
Rate each competency for a current baseline on a scale of 0-10 (10 being the highest).

3) ___ ________________________________

4) ___ ________________________________

5) ___ ________________________________

3. ________________________________

1) ___ ________________________________

2) ___ ________________________________

3) ___ ________________________________

4) ___ ________________________________

5) ___ ________________________________