



Paper

Coaching in Virtual Spaces: video, audio and text-based

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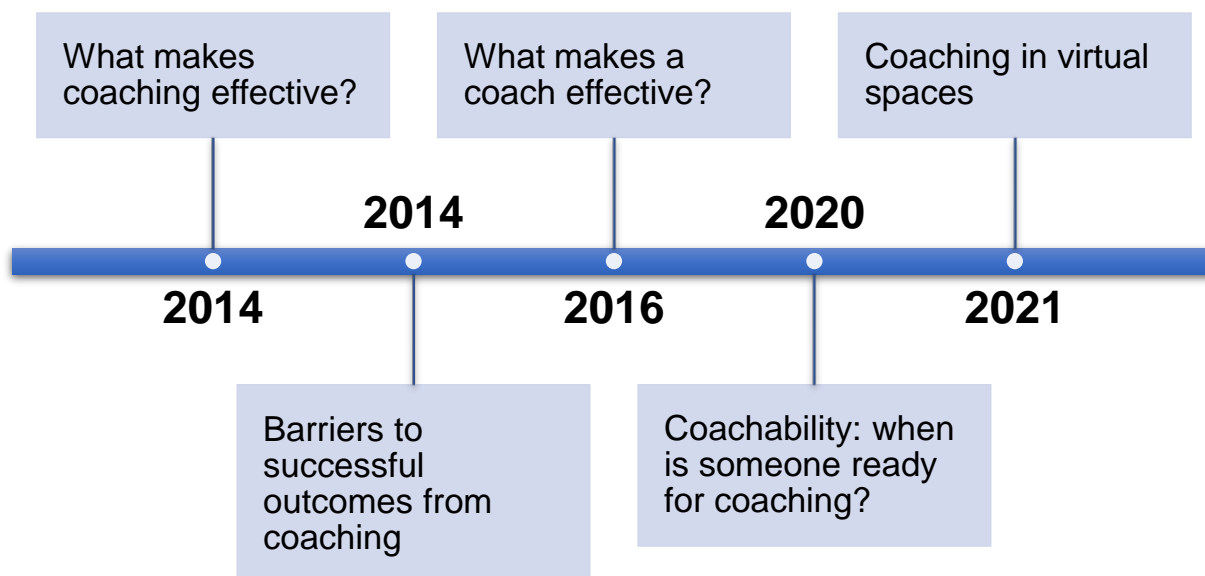
Introduction

Going virtual may have seemed like a daunting task only 17 months ago to the many coaches and line managers who provide coaching support at work to employees and leaders. But even coaches who previously advocated face-to-face as the ‘best practice’ method for delivering coaching quickly adapted. Needs must. But how effective is virtual coaching? Does it get in the way of establishing rapport? What about adding to Zoom fatigue? The list of questions goes on.

This paper brings together the latest research findings and insights from organisation practice since the pandemic began to explore what employers need to know about virtual coaching methods. The paper is written primarily for coaching programme providers and HR/OD professionals. In addition, it may be useful for coaches, academics and practitioner-researchers in pointing to potential areas of further research.

This paper is the fifth in the IES Coaching Effectiveness Series which uses evidence to explore different aspects of business coaching. Our previous papers in the series were produced in conjunction with IES’ research partners at James Cook University in Australia. Figure 1 summarises publication dates and topics covered in the series.

Figure 1: The coaching effectiveness series of IES publications



Source: IES, 2021

For this paper, we explored four questions:

- What are the outcomes evidenced from virtual coaching?
- How do coachees perceive virtual coaching methods compared with in-person?
- How big is the shift to virtual since the pandemic?
- Do the answers to these questions have implications for the way coaching is delivered within organisations?

We used three main information sources to produce this paper:

1. Rapid review of the literature to see if there is clear evidence about how effective virtual coaching is and whether outcomes are the same or different as physically-in-the-same-room coaching methods.
2. Analysis of coachees' responses in the 2nd International Survey of Coaching Effectiveness to compare coachee views of the effectiveness of in-person, video, audio and text-based coaching delivery methods.
3. Analysis of coaching programme data from one sector to compare coaching delivery methods used pre- and post-pandemic.

What does the literature have to say?

There are a variety of terms in the academic literature, such as 'virtual coaching', 'remote coaching' or 'e-coaching' which are used when describing coaching using telephone, video and/or text-based communication. Academics refer to these forms as the modality or 'mode' of delivery. A helpful definition is:

“coaching mediated through modern media...characterized by replacing face-to-face communication with modern media”
(Geissler et al., 2014).

Overall, the literature suggests that modes of remote coaching are well received by both coaches and clients (Berry, 2005; Frazee, 2008; Ghods, 2009), with both parties feeling positive about their experiences (McLaughlin, 2013). However, the majority of the academic research studies have been on coaching for skills acquisition or knowledge transfer purposes rather than coaching for leadership or wellbeing purposes.

Evidence base on telephone-based coaching

Telephone-based coaching is considered to be the most established, researched and frequently used form of delivering remote coaching (Berry, 2005; Grant & Zackon, 2004; Poepsel, 2011). This form of remote coaching facilitates cost-effective access to expertise as a result of reductions in travel and time expenses (Hakim, 2000; Rossett and Marino, 2005), for individuals across diverse geographical

locations (Frazee, 2008). It also enables increased accessibility and frequency of communication for coaches and clients (Frazee, 2008).

Studies have indicated largely positive outcomes achieved through telephone coaching from the perspective of coaches. Berry (2005), for example, suggested that telephone-based coaching may be of equivalent quality to face-to-face coaching. Berry's (2005) study compared face-to-face coaching with telephone coaching among a sample of 102 coaching practitioners. Coaches reported balanced opinions for both face-to-face and telephone coaching, indicating equal footing between the two modalities. Other researchers, such as McLaughlin (2013), have suggested the quality of telephone coaching to be greater than that of face-to-face coaching, as telephone coaching encourages increased focus and pace due to a 'less is more' approach – telephone communication removes visual distractions or cues present in face-to-face coaching. Further, some of McLaughlin's participants considered telephone coaching to enhance rapport development as anonymity is granted for both coach and client, offering an interaction largely free from social indicators. On the other hand, other coaches marked this lack of visuality as a challenge to building rapport as coaches felt their confidence affected during the interaction. A study conducted by Frazee (2008) produced some similar findings, with issues concerning the ability to build rapport via telephone arising.

Ghods (2009) offers another lens to the literature, examining the experience of telephone coaching from the perspectives of the coach, director and peers of the clients. The outcomes of this study concluded satisfaction among clients with regard to the coaching they received, and subsequently, correlations between client satisfaction, coach-client relationship and positive coaching outcomes emerged. These outcomes were sustained six-months after coaching ceased. In line with some of McLaughlin's (2013) findings, clients felt able to build a strong rapport with coaches via telephone.

Whilst some studies have demonstrated the success of telephone-based coaching and its effectiveness when compared with face-to-face coaching, other scholars have questioned the extent to which strong relationships can be built via telephone communication, an integral aspect to producing outcomes. Charbonneau's (2002) research study found telephone coaching to be unsuitable for sensitive behaviour-related coaching purposes and suggested that face-to-face coaching would be more appropriate.

Evidence base on video-based coaching

Similar to telephone-based coaching, video-based coaching offers an efficient alternative to clients engaging in coaching from remote locations (Hu et al., 2012). Furthermore, video coaching holds advantages in its reduction in time and costs (Hu et al., 2012). This modality of virtual coaching emerged as an increasingly popular choice pre-pandemic within the field of medicine, yielding notable performance outcomes (Greenberg, Dombrowski and Dimick, 2016; Hu et al., 2017).

As with some studies examining telephone coaching, video coaching has shown its comparability to other forms of coaching. In the medical training arena, Singh et al (2015) conducted a randomised control trial to evaluate the effectiveness of video-based coaching on laparoscopic surgical skills performance. Findings showed that whilst both treatment and control groups were exposed equally to practical laparoscopic skills training, those who received video-based coaching demonstrated a higher quality of surgical performance. Singh et al. concluded that video-based coaching supported the transfer of skills and strengthened retention for those in the treatment group, and subsequently offered a method of maximising performance. Another empirical study in a medical context found similar results. Soucisse et al. (2017) conducted a randomised control trial aiming to examine the use of video coaching in heightening performance and technical skills among surgical residents compared to their standard learning curve. Their study concluded that one 30-minute video coaching session was an effective means of improving surgical skills and resident self-efficacy.

Video-based coaching has also been utilised by sports coaches to provide performance feedback (Murtough & Williams, 1999; Groom & Cushion, 2004). Groom and Cushion (2004) conducted a case study to explore the perceptions of football players who had received regular video coaching as part of their development programme. This approach offered a range of positive outcomes – 90% of players considered the coaching to have changed the way they thought about their performances after the matches. Groom and Cushion (2004) concluded that video coaching provided an opportunity for players to: improve understanding and decision making; recognise individual and team strengths; improve individual and team weaknesses; and develop analytical skills.

The effectiveness of virtual coaching in both telephone and video modalities is evidenced when it comes to both work-based training and performance settings. Outcomes include reductions in travel and time expenses, increased accessibility to information and frequency of communication, increased focus, enhanced rapport between coach and client, client satisfaction, improved performance, retention of skills, improved self-efficacy, improved teamwork, dedication and commitment. However, virtual coaching is not without limitations. Several studies noted concerns with the approach, namely, issues with rapport building and the appropriateness of virtual coaching in sensitive contexts.

Virtual coaching for wellbeing purposes in workplaces

In the context of wellbeing, coaching has been defined as “a new intervention that applies behavioural science to help clients improve their well-being and performance. It assists clients in reaching desired goals by focusing on growth, values, meaning, self-awareness, and self-actualization” (Lungu et al., 2020). We know that coaching can help individuals deal with stressful situations (Gyllensten & Palmer, 2006) and that health coaching holds a strong basis in client self-

management and self-care by enabling people to better manage their lives, including any symptoms (NHS England, 2020).

COVID-19 has, among other things, increased focus on the resilience and wellbeing of the critical workers and how to enhance both. Factors that contribute to resilience include appropriate coping strategies, self-confidence, optimism and having a strong sense of purpose (Wilson, 2014). Exercising good judgement about when to seek support from managers and colleagues (and when not to) is also important. Different factors may come into play depending on the person or the situation.

From a review of empirical studies, we know that coaching does have the potential to enhance resilience and wellbeing (Lawton-Smith, 2017). Studies have found coaching helps reclaim self-belief and feeling capable of operating effectively in their environment. A landmark IES research report found statistically significant increases in perceived wellbeing from a range of coaching programmes, mainly across the public sector (Hicks et al., 2012).

A wide range of studies are showing that many different types and formats of coaching can show positive outcomes. Although researchers don't yet know for sure what makes this happen, it seems likely that it may be the coaching process itself which supports wellbeing, ie time and thinking space for a private conversation with a supportive, non-judgemental, independent coach acting as a sounding board (Lawton-Smith, 2017).

In the context of workplace wellbeing, studies examining the effectiveness of coaching via video or telephone means have been sparse until recently. Lungu et al. (2020) evaluated the efficacy of a video and telephone-based cognitive behavioural coaching programme (CBC) for 289 people who had requested wellbeing support in their workplace. The study set out to measure the extent to which subject stress and wellbeing changed over the course of the programme. Coaches and employees engaged in up to six 45-minute coaching sessions via video or telephone, accompanied by optional booster sessions, worksheets, blogs and additional videos. Employees also had access to an online messaging app which enabled them to contact coaches regarding homework. Over three-quarters of employees who received coaching for stress saw significant improvement in stress reduction

More recently IES evaluated the early impact from a virtual coaching programme for front line healthcare workers during April–December 2020. The coaching was a coachee-led flexible offer, with staff choosing the number of sessions and their preferred method of audio or video delivery (eg Zoom, Skype, Teams, Facetime) Analysis of pre- and post-coaching survey responses from a matched sample of over 400 staff showed statistically significant increases in staff perceptions of both wellbeing and resilience following virtual coaching (Mason & Carter, 2021). This was in a context where average wellbeing and resilience was declining among staff in similar frontline roles who had not been coached.

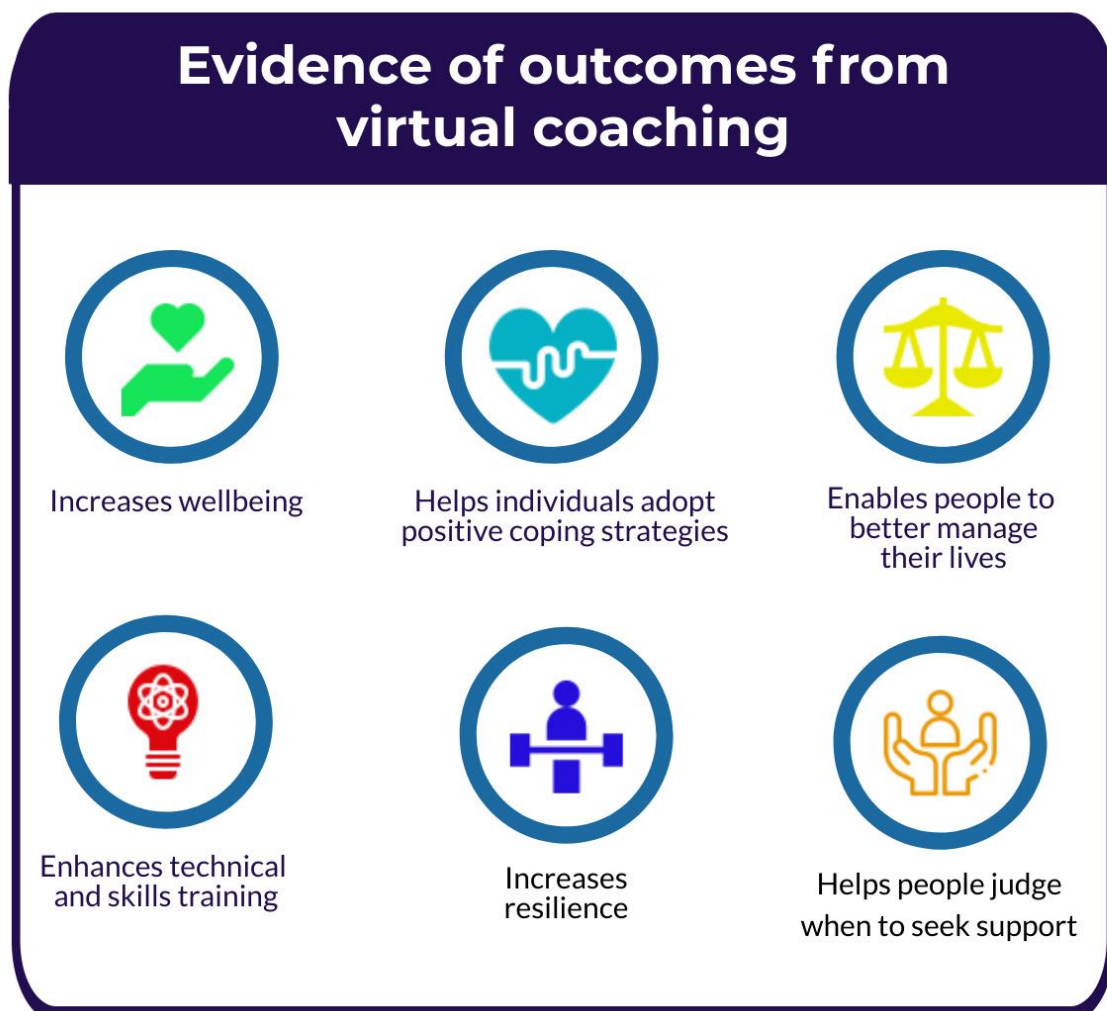
The IES study confirms the Lungu study results in terms of wellbeing outcomes from video and audio-based coaching. However, neither of these studies directly

compares face-to-face coaching with virtual coaching or investigates other variables, eg time, cost, effects and outcomes.

Reflecting on the evidence from research

There is insufficient published research as yet to conclude that using virtual coaching methods result in better or worse outcomes than face-to-face coaching. However, there is a growing body of studies that point to positive outcomes from virtual coaching. A summary of outcomes is presented in Figure 2. Whilst these outcomes are not necessarily different from outcomes which might result from face-to-face coaching, they provide reassurance to employers that such outcomes can be achieved from other methods than face-to-face coaching.

Figure 2: Summary of outcomes from virtual coaching



Sources: IES Rapid Review of Literature, 2020

What do coachees have to say about coaching methods?

We used data collected from the 2nd International Coaching Effectiveness Survey¹ that explored coachee perspectives during 2019. The survey was completed by over 300 industry professionals from a variety of industries and residing in a variety of different countries. All had recently been, or were currently being, coached.

Questions sought to understand, from the coachee perspective, how important, useful and effective coachees thought the delivery format and the activities used in their coaching experience was. The full survey results are not yet published, but IES conducted some early analysis on coachee perceptions of the effectiveness of face-to-face, video and audio-based coaching, specifically for this paper. It is important to note that our focus here is on how effective the coaching delivery method is, and not what the outcomes of the coaching were.

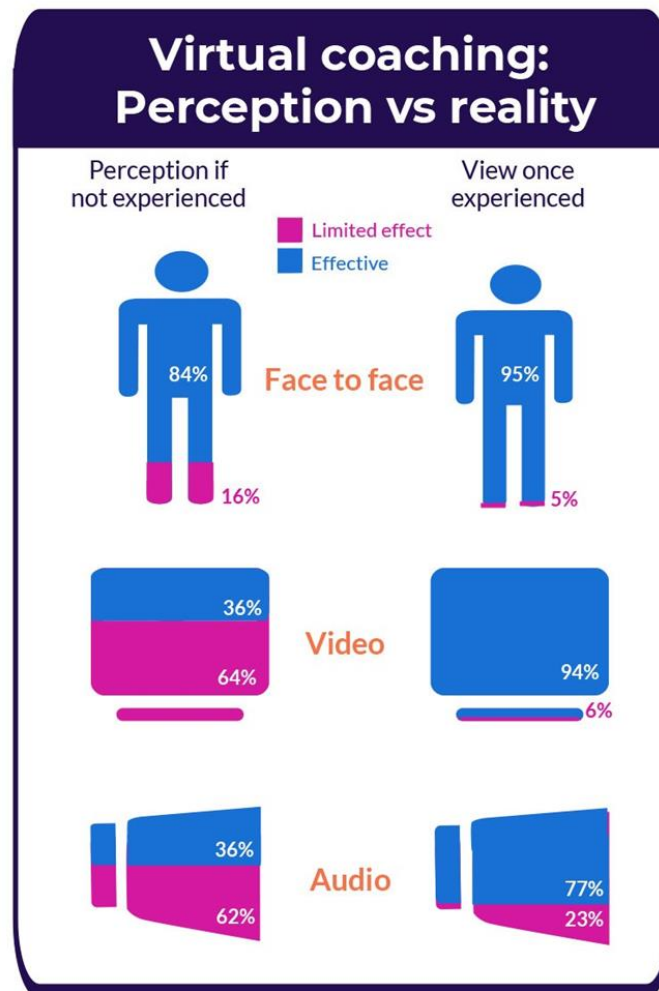
Respondents reported on the coaching delivery methods they had experienced, which were face-to-face physically in the same room (36%), followed by video conferencing platform (30%) and by telephone (24%). Some respondents received coaching by email (6%), texting (3%) and social media (1%).

We asked all respondents, whichever delivery method(s) they had experienced, how effective they perceived all methods. Across our sample, 91 per cent of individuals rated face-to-face coaching positively in terms of its effectiveness. Video and audio delivery were also seen to be effective, although less so at 66.4 per cent and 53.5 per cent, respectively.

However, we found a perception-reality gap when it comes to virtual coaching methods. Those who have experienced only face-to-face coaching are more likely to view video or telephone coaching as a less effective means of delivery than those who have actually experienced these alternative methods. Respondents who had experienced video coaching consider it to be a more effective mode of delivery than those who have not, with 94 per cent of those who have experienced video coaching rating it as effective. That is similar to in person face-to-face coaching. It may be that video has the same benefits as in person, from the coachee's perspective, perhaps as both are perceived as 'face-to-face'. And the same perception-reality gap was true for audio coaching, with those who have experienced audio coaching considering it to be more effective than the perceptions of those who have not, with 77 per cent of those who experienced audio coaching rating it as effective. That is not as high as for in person or via video, but still high.

¹ Conducted jointly by James Cook University (Australia), IES (UK) and McColl Business School, Queen's University in Charlotte (US).

Figure 3: Virtual coaching: perception vs reality



Source: JCU, IES & QSC, 2020

How big is the shift to coaching virtually?

IES Network members of large employers have been asking whether all coaching is now virtual. In some cases member organisations have reported to IES that their coaching offers is virtual because all staff were working from home. In other cases, coaching was reported as virtual even for critical workers in roles requiring delivery of services in person direct to the public (coaches were working from home but staff being coached were not). In both contexts, there was an underlying assumption that pre-pandemic the majority of coaching was delivered in person. But is that assumption correct?

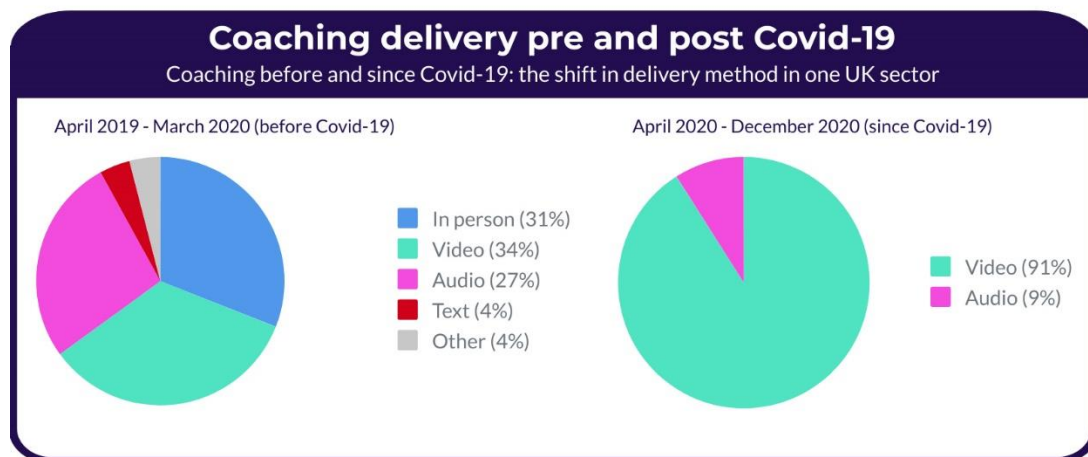
One organisation's experience

To explore this further, we approached some large employers to ask them what they thought. One organisation with long-term experience of running coaching programmes kindly agreed to IES analysing their in-company data and sharing their story of re-purposing their coaching. This allowed us to compare coaching delivery methods (as reported by their coachees) during the first 12 months of the pandemic and compare it to 12 months pre-pandemic.

Firstly, we analysed pre-pandemic survey data from coachee participants on two of the organisation's longest running targeted programmes which had delivered coaching to over 3,000 managers and professional offering 3–4 coaching sessions of up to two hours duration each. Although the external coaching provider had recommended that face-to-face physically in-the-same-room coaching should be regarded as the gold standard, in practice the leaders and professionals being coached were empowered to negotiate the method that best suited themselves. An analysis of the coaching method showed that many had been opting for virtual coaching pre-pandemic, with less than one-third (31%) reporting the primary method they experienced as face-to-face coaching. The most common method was coaching over a video conferencing platform (34%). Audio only, most often using telephone, accounted for over a quarter of coaching (27%). It is possible that in other work settings or in other occupations not requiring a laptop or desktop at work, these figures may have been different. Nevertheless, the degree to which their personnel had already switched over to virtual methods before the pandemic was a surprise to the organisation. So, in this one context, it would be incorrect to assume that the majority of coaching pre-pandemic was delivered in person.

Secondly, we looked at programme data from during the pandemic. We expected that all the delivery to be virtual, as the organisation told us they had repurposed their coaching programmes to support individual front-line employees at any/every level with their psychological health and wellbeing. The coaching became coachee-led, with employees able to sign-up online for one to four sessions of 30–45 minutes duration each. Crucially, all coaching was offered virtually to enable both frontline staff and those working from home to choose the virtual method they wanted. Over 6,000 sessions were delivered during the year. The analysis showed that over three-quarters of sessions were conducted over the video conferencing platform Zoom (77%), whereas telephone (9%), WhatsApp (7%), and Facetime sessions (5%) were used to a lesser extent. Adding the video-based options together, shows that 91 per cent of staff chose video-based coaching and just 9 per cent audio. So, in this one context, the coaching method switched to all virtual, but interestingly both the target audience and the outcomes expected also changed. Coaching was previously offered to selected senior personnel for organisational future transformation purposes. During the pandemic this switched to an offer to any/all employees for their own wellbeing purposes and to support the here and now of keeping people able to continue delivering the organisation's services.

Figure 4: The extent of the shift to virtual in one sector



Source: IES analysis of in-company data, 2021

Reflecting on the practice of employers

We ran a virtual workshop for fourteen IES Research Network member organisations in October 2020 and asked them to what extent do the experience of our one case study organisation resonate with your experience in your organisation?

The employers were unanimous in confirming that existing coaching provision, if it continued, had all switched to virtual and that coachees typically had no problem with virtual methods of coaching: it was a 'non-issue'. By contrast in-house coaches and line managers were often anxious about virtual coaching. The view seemed to be that the initial training and on-going practice in coaching skills assumed a face-to-face format and that often techniques recommended and honed over time needed adaption (or replacing) to work in a remote context. Some internal coaches were up for this; others perhaps might have been willing to transition, but in parallel with the huge demands of the pandemic in keeping the show on the road meant they preferred to pause all or many of their coaching commitments.

There was a wider spread of experience when it came to the delivery of coaching during the pandemic. Many of the employers had paused or stopped their formal programmes at the outset of the pandemic and were planning for resumption 6-12 months later. This was particularly the case where coaching was used in combination with other methods as part of 'set-piece' leadership development programmes or performance improvement initiatives. For the remainder of employers, coaching carried on but with a variety of changes noted, which included: less leadership and teams coaching; reduced availability of coaches and staff within the business who may have been furloughed and/or stressed; more personal and resilience coaching taking place; and refocussing of coaching resources to support business critical functions/key workers.

What might this mean for employers and their coaches?

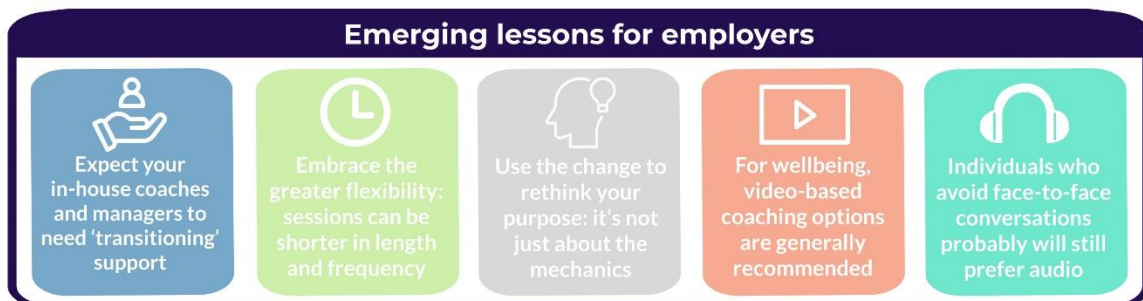
Telephone coaching seemed to have a good track record, especially for training, leadership development and knowledge transfer purposes, and it offers a greater feeling of anonymity than face to face modes which may encourage some coachees to be more open. However, there are two question marks about the appropriateness of telephone coaching, specifically:

- Whether it provides an effective process for delivering coaching (when the development of rapport is essential)
- and whether it is suitable choice for achieving certain kinds of required outcomes (eg for sensitive behaviour related purposes) which may include discussion of own well-being and development of coping strategies.

Video coaching also seems to be positively received, especially when adopted for technical skills training and/or performance improvement. As there are less question marks about its appropriateness for wellbeing purposes, it is suggested that employers recommend video-based coaching options over telephone-based.

It may be that video has the same benefits as in person, from the coachee's perspective, perhaps as both are perceived as 'face-to-face'.

Figure 5: What are the lessons for employers?



Source: IES, 2021

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