



# Coaching Pilot Outcomes

Katy J Health and Wellness





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01.

# How we measure success





# Coaching Pilot Goals

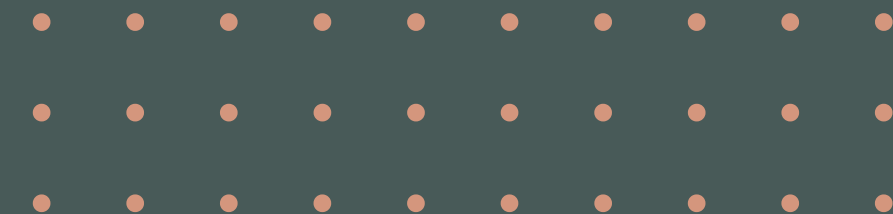
## Short Term:

- ✓ ○ Pilot participants complete 5 targeted coaching sessions over 8 weeks
- ✓ ○ Participants will experience improved well-being as indicated by:
  - Minimum 1-point improvement (on a 10 point scale) in one or more area of the health and wellness survey

## Long Term:

Program outcomes will support improvement in at least 2 of the following areas:

- ? ○ Health insurance costs, **absenteeism** and **presenteeism**, error rates, burnout and turnover, recruitment and retention, morale, engagement, employee NPS, individual and team performance and productivity, quality of work and customer service
- This must be measured by individual companies going forward



# 15 measurements of well-being

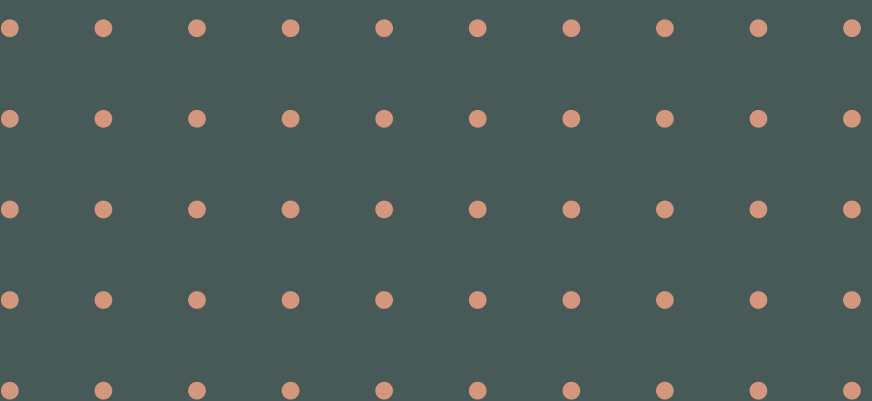
1. Self-confidence
2. Motivation
3. Energy
4. Productivity
5. Organization & time management
6. Engagement at work
7. Physical activity
8. Nutrition and healthy eating
9. Sleep
10. Stress
11. Emotional well-being
12. Recreation & play
13. Social connection
14. Meaning & purpose
15. Overall well-being



# Survey measurements

- Participants completed a survey prior to and upon completion of the pilot
- Participants rated each aspect of well-being in terms of:
  - general perception of current state
  - satisfaction with current state
- Ratings were given on a scale from 0-10, with 0 representing the lowest level of well-being or satisfaction, and 10 representing the highest.
- Qualitative feedback was requested on the overall coaching experience

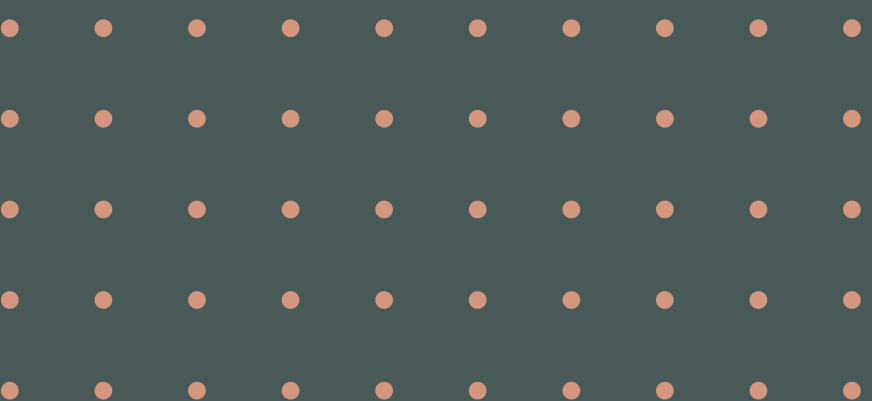
\* See Appendix A for sample survey





# Why measure satisfaction?

- When life throws us a curveball, it can be difficult to maintain a sense of well-being.
- We may not have control over the circumstances, but we can still work on improving our attitude and experience of them
- This may not lead to an overall change in the state of our well-being, but it can help us **feel better** about it
- Satisfaction ratings are a good way to measure this **shift in mindset** and **perception**
- These mindset shifts impact **resilience** and **general well-being**



02.

# Pilot Outcomes







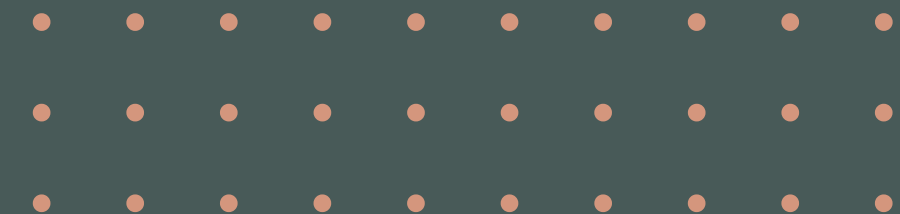
# Overall Well-Being

**+1.4 points**

Average improvement in overall well-being

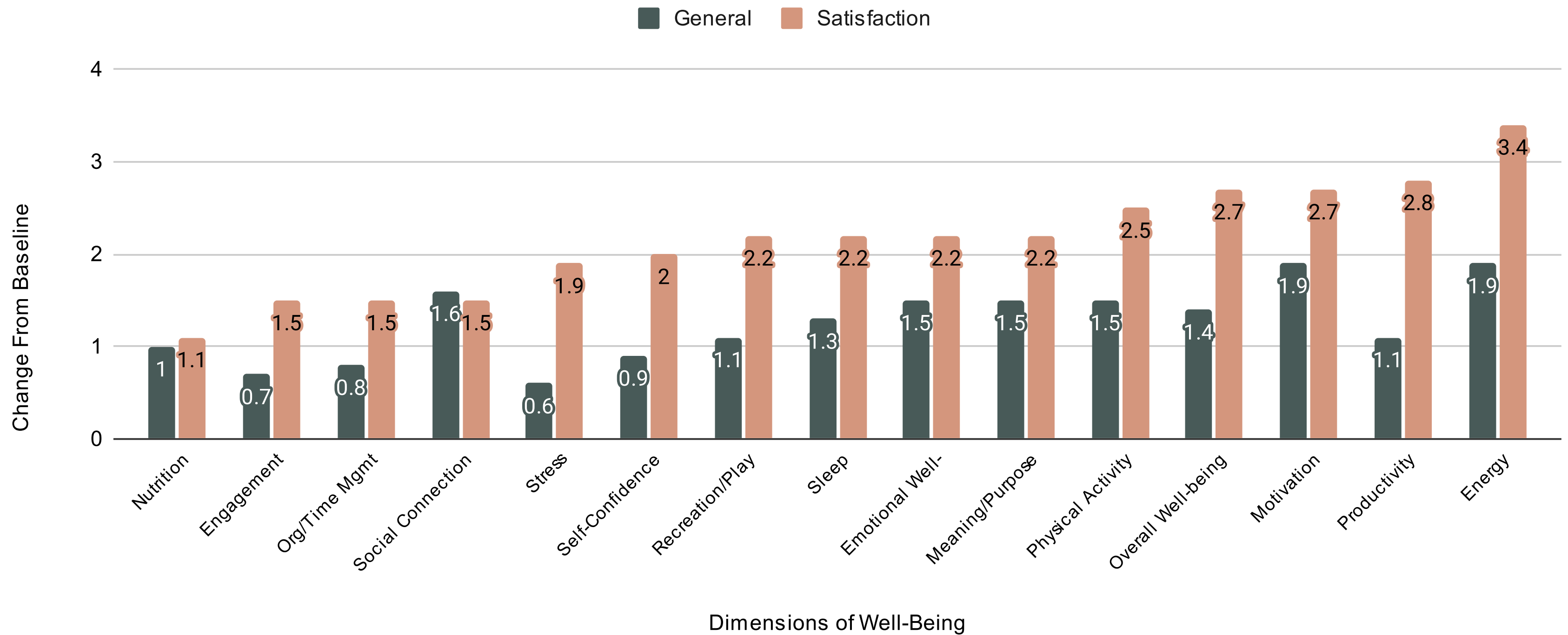
**+2.7 points**

Average improvement in satisfaction with overall well-being



# Outcomes

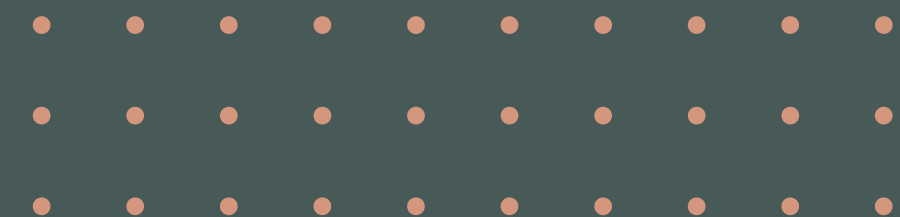
Change in well-being (all pilot companies)





Average change  
across 15 dimensions  
of well-being

+ 1.25 points

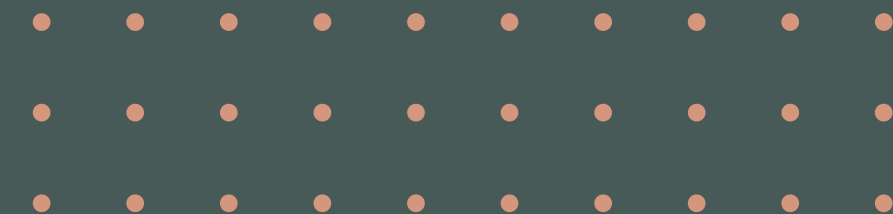




Average change in top  
3-4 categories related  
to coaching goal

+ 1.87 points

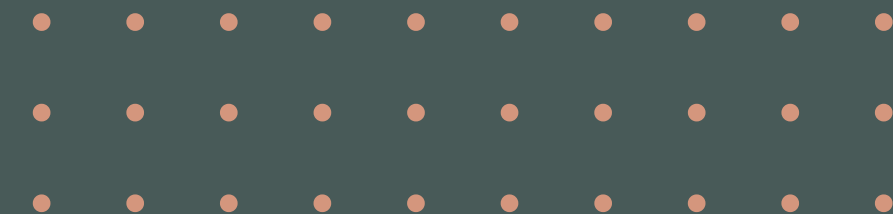
See Appendix B for sample of individual goals and related categories





Average change in  
satisfaction across 15  
dimensions

+ 2.16 points



03.

# Participant Feedback





## Question:

Do you feel you made real progress on the goal you set with your coach by the end of this pilot?

Definitely: 80%

Mostly: 20%







## Question:

Did Kate's coaching style meet your needs and help you work towards your goal?

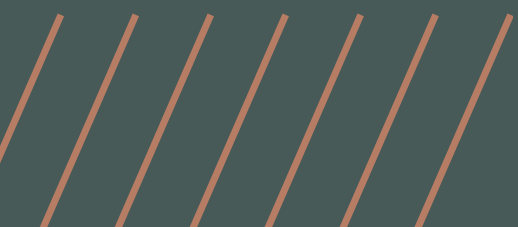
Definitely: 90%  
Mostly: 10%



# General Feedback:



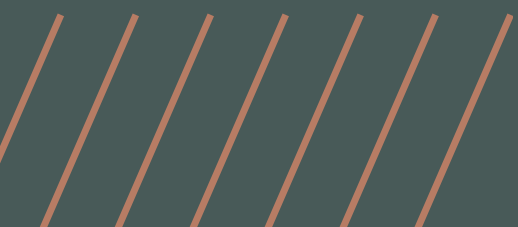
<p>Helped me to re-focus on personal and professional priorities</p>	<p>Making such progress on work goals has fed into improvements in personal well-being (sleep, nutrition, exercise)</p>
<p>I now have tools for handling work stress and challenges in a way that lead to healthier responses and progress</p>	<p>Would have helped to have time to learn the process of goal planning and tracking so I could continue after coaching</p>
<p>Helped build a habit of breaking big goals down into small, manageable pieces so I can see progress and have clarity on how I will reach the finish lines</p>	<p>I feel less overwhelmed by work challenges and deadlines which makes me less anxious, more engaged, and more satisfied with work.</p>



# General Feedback:



<p>It has improved and given me the strength and focus to keep on moving through my problems.</p>	<p>We came up with tools to help me better communicate and organize my day at work and home. Now I feel better prepared to face my day and obstacles.</p>
<p>Helped me: look at everything more holistically to see how the different pieces of my life fit together; feel more at ease and see how progress on one aspect is progress overall.</p>	<p>This outside accountability helped me to make progress towards goals that I have been wanting to work on for awhile, gave me the push I needed to start and provided me with realistic tools to keep making progress</p>
<p>The entire coaching experience has had a direct, positive influence on the goals I was hoping to achieve. This process has helped both my personal, and my professional development.</p>	<p>I feel more confident about my ability to handle big changes within our organization and in my personal life. Even if the changes are hard, I'm ready to take on whatever comes my way.</p>

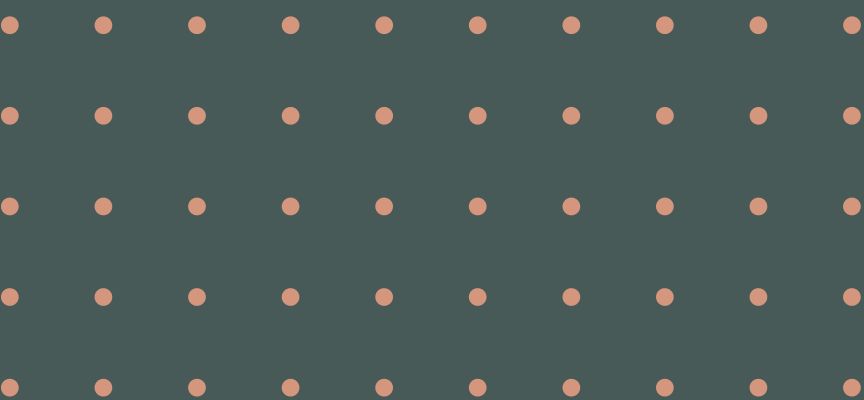




## Question:

Would you want your company to continue to offer coaching as an employee benefit?

Yes: 100%





## Question:

If your company offered coaching as an ongoing free benefit, would you sign up to participate again?

Yes: 100%



# Feedback: Should Coaching Continue?

I think this can help others at the company learn to approach work challenges more effectively

This was definitely a great value for my career and personal development. I'd continue and recommend to colleagues.

We can all benefit from improving, management, planning, and communication skills at work

Yes! Can we have the option to move to 1-2x per month once we get momentum started?

# Feedback: Should Coaching Continue?

I think this would be a very beneficial employee benefit since Kate is able to help with a wide range of topics. During stressful times for the organization I think a lot of people would find this useful in helping manage some of that stress in whatever way works best for them.

Yes, absolutely. Our company currently offers no other 'coaching' or 'development' of any kind. Kate is able to offer both personal and professional coaching, that I believe will ultimately benefit not just our employees, but also the entire organization.

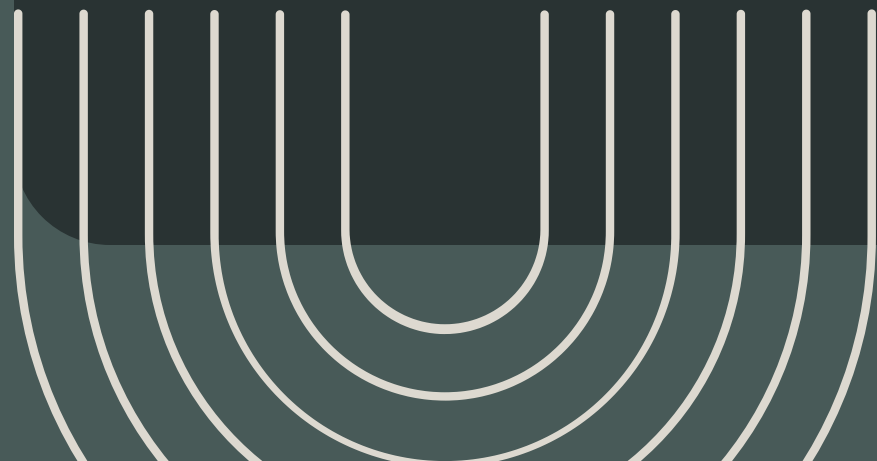
This would be a great wellness benefit for our employees, especially for companies undergoing a lot of changes.

I think it could be really helpful to other coworkers.



04.

# Next Steps



## Flexible Path

Book packages on demand, for eligible employees.  
Availability not guaranteed.

Determine who is eligible for coaching and how many total sessions they are eligible for. We recommend offering at least 12 coaching sessions per employee per year to be able to complete a full coaching arc.

Employees sign up for the coaching wait-list. As availability allows, employees will be approved on a first-come, first-served basis for a 4-pack of coaching sessions (\$400). You will only be invoiced for approved packages, up to a maximum number of employees set by the company. Employees can request an additional package, up to the maximum number of sessions allowed by the company.

Coaching availability is not guaranteed on this path.

**From \$500**

Approve 4-session package per employee upon request

## Priority Path

Reserve coaching sessions for a select number of employees each month, guaranteed availability.

Determine who is eligible for coaching and how many total sessions they are eligible for. We recommend offering at least 12 coaching sessions per employee per year to be able to complete a full coaching arc.

Each month, the company will reserve weekly or bi-weekly coaching sessions for a predetermined number of employees (\$200–400/employee). Eligible employees sign up on a first come, first-served basis up to the maximum number of company reservations. Once all reserved slots are filled, additional employees join the wait-list. The company may increase or decrease total reservations for the following month as availability allows.

**From \$250/month**

Reserve 2–4 coaching sessions/month per employee in advance

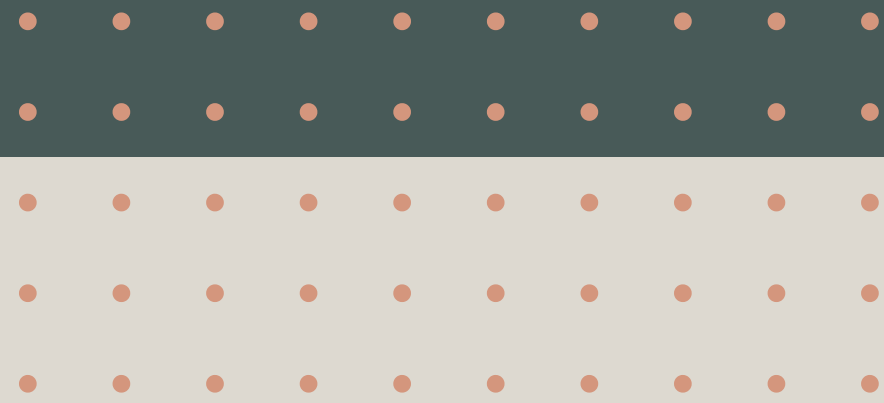
# Which path is right for you?

## Flexible

- You have tight budgetary constraints
- Your employees want general support with personal or professional goals that aren't time constrained or have a longer time horizon.
- For employees:
  - Wanting to learn about new tools or practices to improve in one area, without ongoing experimentation or implementation support
  - Completed management or other training and needs support implementing new skills
  - Working on improving general skills or habits that don't require consistent experimentation and review
- Your employees have flexibility for scheduling and prefer to take advantage of coaching as a supplemental resource on a less frequent basis.

## Priority

- You have more budgetary flexibility
- Your employees need targeted support with more intensive goals on a shorter time horizon (1–3 months).
- For employees:
  - On a performance improvement plan (PIP), needs added support rising to expectations
  - Returning from parental or family leave needs support transitioning back to work, balancing new work/life responsibilities
  - Adjusting to promotion or role change (increase or change in responsibilities & performance expectations, new skills, etc.)
  - Experiencing other big life changes/challenges, needs extra support that HR or manager aren't equipped to provide
- Your employees benefit from consistent coaching availability without risking losing momentum when availability is limited.

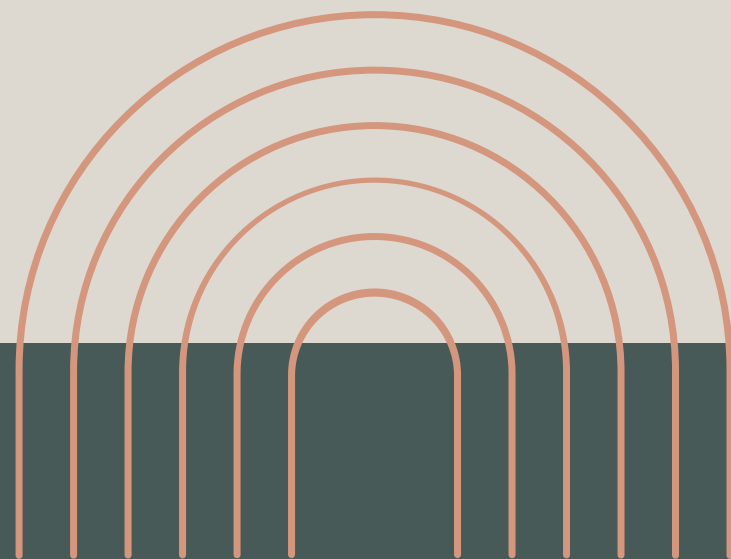


# Thank you

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# Appendix A

## Coaching Pilot Survey Sample



### Coaching Pilot Completion Survey

Thank you for your participation in the coaching pilot program! Please fill out this form so we can get a picture of how your overall health and well-being have changed after the program

**Note on Privacy & Confidentiality:**  
 All survey responses will be aggregated and anonymized in a final report that will be share with your company leaders. The purpose of this report is to review high level pilot outcomes and determine next steps, if any, for this program. Any responses with personally identifiable information will not be included or shared.

**Please rate your current level of self-confidence on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = no self-confidence, 10 = total self-confidence*

**Please rate your current SATISFACTION with your level of self-confidence on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of motivation on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = no motivation, 10 = totally motivated*

**Please rate your current SATISFACTION with your level of motivation on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of energy on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = no energy, 10 = totally energized*

**Please rate your current SATISFACTION with your level of energy on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of productivity on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = get nothing done, 10 = complete everything on my list*

**Please rate your current SATISFACTION with your level of productivity on most days**

0 1 2 3 4 5 6 7 8 9 10

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of organization and time management on most days**

012345678910

*0 = I am totally unorganized and can't manage my time, 10 = Organization & time management are my middle name*

**Please rate your current SATISFACTION with your level of organization and time management on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of engagement at work on most days**

012345678910

*0 = I am totally disengaged, 10 = I am fully engaged*

**Please rate your current SATISFACTION with your level of engagement at work on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of physical activity on most days**

Baselines recommendations are to get 150 minutes of moderate intensity exercise per week

012345678910

*0 = no movement, 10 = I get well above recommended activity levels*

**Please rate your current SATISFACTION with your level of physical activity on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of nutrition and healthy eating on most days**

012345678910

*0 = my diet is abismal, 10 = I am a of model healthy eating and nutrition*



# Appendix A

## Coaching Pilot Survey Sample

Coaching Pilot Completion Survey - Katy J Health and Wellness

**Please rate your current SATISFACTION with your level of nutrition and healthy eating on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of quality sleep on most days**

012345678910

*0 = my sleep quality is terrible, 10 = my sleep quality is perfect*

**Please rate your current SATISFACTION with your level of sleep quality on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of stress on most days**

012345678910

*0 = I am so stressed out I almost can't function, 10 = I am stress-free*

**Please rate your current SATISFACTION with your level of stress on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of emotional well-being on most days**

012345678910

*0 = I am emotionally drained, 10 = I am balanced and emotionally healthy*

**Please rate your current SATISFACTION with your level of emotional well-being on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of recreation & play on most days**

012345678910

*0 = I only have time for work and responsibilities, 10 = Work & recreation/play are perfectly balanced*

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Coaching Pilot Completion Survey - Katy J Health and Wellness

**Please rate your current SATISFACTION with your level of recreation & play on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of social connection and community on most days**

012345678910

*0 = I feel totally disconnected and alone, 10 = Social life & connection are full, vibrant, deep*

**Please rate your current SATISFACTION with your level of social connection and community on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of connection to deeper meaning and purpose on most days**

012345678910

*0 = I experience no meaning or purpose day-to-day, 10 = My life is full of meaning and purpose*

**Please rate your current SATISFACTION with your level of connection to deeper meaning and purpose on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

**Please rate your current level of overall health and well-being on most days**

012345678910

*0 = I am totally unwell, 10 = I am the picture of health and well-being*

**Please rate your current SATISFACTION with your level of connection to deeper meaning and purpose on most days**

012345678910

*0 = totally unsatisfied, 10 = totally satisfied*

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Coaching Pilot Completion Survey - Katy J Health and Wellness

**Do you feel you made real progress on the goal you set with your coach by the end of this pilot?**

Definitely  
Mostly  
Unsure  
Not Really  
Definitely Not

**Please write a short reflection on how you feel your health, well-being, and/or development have been impacted by the coaching experience, if at all:**

### Kate's Coaching Approach

**Did Kate's coaching style meet your needs and help you work towards your goal?**

Definitely  
Mostly  
Unsure  
Not Really  
Definitely Not

**What, if any, part of Kate's coaching approach was most helpful for you?**

**What, if any, part of Kate's coaching approach was not optimal for you, and how could she improve?**

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# Appendix A

## Coaching Pilot Survey Sample

Coaching Pilot Completion Survey - Katy J Health and Wellness

Any other feedback on Kate's coaching approach:

### Feedback for your company

Would you want your company to continue to offer coaching as an employee benefit?  Yes  No

Why or why not?

If your company offered coaching as an ongoing free benefit, would you sign up to participate again?  Yes  No

Why or why not?

What would you like your company to know about your experience with this coaching pilot?

Please note, this response will be shared as a direct quote - but will not be attributed to you unless you specifically indicate you want your name associated with it.

Can we attribute this feedback to you?  Yes  No

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Coaching Pilot Completion Survey - Katy J Health and Wellness

### Client Testimonial

If you're comfortable, please share a short testimonial of your coaching experience for future clients to read. If you choose to share something, you can decide how you would like the quote to be attributed to you next.

This is optional but much appreciated!

If you shared a testimonial, how would you like it attributed to you

- Anonymous
- Initials only
- First name only
- First name, last initial
- Full name

Thank you for your participation in the pilot and responses to this survey! Please feel free to reach out with any other questions or to stay in touch at [kate@katyjwellness.com](mailto:kate@katyjwellness.com)

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# Appendix B

## Individual Goal & Correlated Categories

### Goal 1:

Improve emotional well-being, stress, energy, motivation

### Correlated Category Change:

Emotional Well-Being: +3

Stress: +2

Energy: +4

Motivation: +4

# Appendix B

## Individual Goal & Correlated Categories

### Goal 2:

To improve stress related to procrastination, and improve communication—especially how both show up in professional and personal relationship strain.

### Correlated Category Change:

Stress: +3

Productivity: +4

Emotional Well-Being: +2

# Appendix B

## Individual Goal & Correlated Categories

### Goal 3:

Improve self-confidence, emotional well-being and sense of purpose and belonging

### Correlated Category Change:

Self-confidence: +1

Emotional well-being: +4

Meaning & purpose: +3

# Appendix B

## Individual Goal & Correlated Categories

### Goal 4:

Explore different practices and tools to manage stress and anxiety

### Correlated Category Change:

Stress: +0

Stress (Satisfaction): +1

Emotional Well-Being: +1

Self-Confidence: +1

# Appendix B

## Individual Goal & Correlated Categories

### Goal 5:

Effectively communicating what I'm feeling and why I'm feeling it in challenging or stressful times

### Correlated Category Change:

Stress: +3

Emotional Well-Being: +1

Social Connection: +4

# Appendix B

## Individual Goal & Correlated Categories

### Goal 6:

How do I effectively lead my company? What is my role currently, what should it be, and how can I start to bridge the gap?

### Correlated Category Change:

Meaning & Purpose: +0

Motivation: +1

Productivity: +0

# Appendix B

## Individual Goal & Correlated Categories

### Goal 7:

Supporting mental health and well-being through work challenges while creating clearer boundaries for myself so that I have more energy and balance outside of work.

### Correlated Category Change:

Energy: +0

Energy (Satisfaction): +1

Emotional Well-Being: +1

Recreation & Play: +2



# Appendix B

## Individual Goal & Correlated Categories

### Goal 8:

Upleveling role as a manager and leader of the team; starting to standardize processes that will help the team mature in 2023.

### Correlated Category Change:

Motivation: +2

Productivity: +1

Organization & Time Mgmt: +1

# Appendix B

## Individual Goal & Correlated Categories

### Goal 9:

Work on improving organization & time management, stress, social connection, purpose & meaning

### Correlated Category Change:

Stress: +0

Meaning & Purpose: +2

Organization & Time Mgmt: +2

Social Connection: +2

# Appendix B

## Individual Goal & Correlated Categories

### Goal 10:

Stress management and resilience; connecting to deeper purpose and meaning in personal and professional life. Wanting to feel more focused and motivated at work, less overwhelmed by daily life stressors.

### Correlated Category Change:

Stress: +2

Meaning & Purpose: +2

Motivation: +2

Emotional Well-being: +3