



Guide to Evaluating Coaching Platforms



Executive Summary

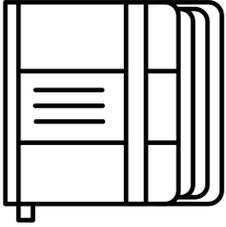
Disruption by digitalization, automation, and environmental influences have created a divide between the old world of work and the new. Each organization needs to evolve and adapt to survive. People need to learn and grow as well. Every global organization has responded to change in different ways, but the focus on people and supporting their growth through change is critical to the future success of any organization.

Research suggests that lasting change takes place only when individuals experience three phases that are essential for development: 1) Awareness - creating awareness of one's values, strengths, and opportunities for change, 2) Growth - experiential and applied learning that brings individuals into the 'stretch zone', 3) Reflection - the intentional practice of synthesizing the learning gained through application and experience. Coaching is generally accepted as the most effective way to facilitate this development process but until

now, has been too costly to scale. The rise of mobile-based coaching makes this possible for organizations; however, there is much to consider beyond a provider's ability to connect employees with coaches via a virtual or mobile technology.

You need a partner that is able to provide personal development and human transformation at scale, rooted in evidence-based practice, and proven by data. Today, BetterUp is disrupting the coaching market with our delivery of a solution that balances science, technology, and human components. BetterUp leverages evidence-based coaching practices to drive behavioral change that is tracked over time, available at your fingertips, and provides deep insights that inform global talent strategy. Our technology supercharges a human-based coaching experience to provide best-in-class, large scale, democratized coaching programs. BetterUp allows you to support your people's professional and personal growth to unlock their potential in a measurable way within the context of your strategy and your goals. BetterUp delivers the right support at the right time, for every employee across the organization.

Based on BetterUp's extensive research on the science behind lasting behavior transformation and our experience working with more than 600+ organizations, we recommend the following evaluation criteria when considering scalable coaching solutions for your organization:



- 1 Holistic Design : pg 4

- 2 Scientific Rigor & Efficacy: pg 5

- 3 Coaching Quality at Global Scale: pg 6

- 4 Enterprise Grade Security: pg 7

- 5 Integrations: pg 8

- 6 User Experience: pg 9

- 7 Analytics & Insights: pg 10

- 8 Financial Viability: pg 11

- 9 Operational Infrastructure: pg 12

- 10 Continuous Innovation: pg 13

Holistic Design

Why it Matters

A holistic design enables measurable organizational outcomes and goes beyond coaching sessions. Effective solutions offer a blended approach that: integrates assessments, personalizes coaching, reinforces learning, provides accountability, incorporates feedback from stakeholders, and measures outcomes.

BetterUp's Approach

BetterUp provides a robust suite of tools and capabilities to design an approach for transformation tailored to each organization:

- **Assessments:** Full suite of validated assessments including self-assessment, 360 feedback, pulse surveys
- **Coaching Modalities:** Our coach match rate is 97% spanning a variety of coaching types including unlimited, dedicated one-on-one coaching as well as on-demand coaching to address in the moment needs and speciality coaching for in the areas of communication, resilience, DEIB, sleep, and more
- **Coaching Topics:** Our global, diverse coaching network is equipped to coach on dozens of topics across career development, leadership, well-being, performance, influence. Sales Performance to Diversity, Equity, Inclusion & Belonging to Career Growth and Nutrition
- **Immersive Learning:** Strengths-based individualized development plan that includes curated readings, videos and interactive lessons; coach-guided activities and practice; evidence-based accountability tools.
- **Insights and Analytics:** Data to measure growth at the individual, team, and organizational level via insights dashboards, aggregated behavior analytics and progress reporting, popular coaching topics, employee engagement and satisfaction, and admin panel / program support
- **Measurable organizational outcomes:** Validated outcomes measurement mapped to organizational objectives and presented in both real-time and at quarterly organization reviews, ROI, and custom impact studies to evaluate efficacy and impact.

As you evaluate vendors, stop to consider . . . are you being offered a variety of developmental experiences to meet the evolving needs of your entire workforce?

Your organization will evolve, and so will your people. Your front-line leaders, high potentials, senior leaders, or sales managers will have different concerns, daily challenges, and developmental needs. It's important to match them with the right type of coaching experience. Companies promising organizational change through stand-alone virtual coaching capability lack the ingenuity that a comprehensive coaching platform delivers. Be wary of any company offering executive coaching for all. While tempting, this program

eliminates the tailored approach to help each individual grow the skills and competencies needed and lack the support for their day to day personal and professional challenges.

Scientific Rigor & Efficacy

Why it Matters

Scientific rigor and efficacy drive reliable and predictable results. In a data-driven world, you should expect nothing less from a prospective partner.  Coaching that is not evidence-based is analogous to making organization decisions with bad data. With organizations making significant investments in people development, it simply makes good organization sense to select solutions that are empirically proven to drive outcomes.

BetterUp's Approach

Everything we do is evidence-based, from our assessments to our coaching methodology to our product design. Developed by a powerhouse line-up of PhD's, MDs and industry luminaries, supported by ongoing BetterUp research studies, over 1.5M coaching sessions, and tested on hundreds of thousands, BetterUp's platform relies on a uniquely-rigorous and psychometrically-validated data model.

Our developmental methodology is comprehensive of both inner thriving behaviors and outward leadership behaviors captured from multiple sources and may be mapped to your competencies. We go beyond simply measuring usage and engagement, but also provide ongoing tracking of behavioral growth and outcomes measurement at the individual, team, and organizational level as well as industry benchmarking and additional analytics and ROI studies.

We do this through our team of 50+ Ph.Ds on staff that offer their expertise to our BetterUp Labs and People Insights teams daily, specializing in areas across behavioral sciences such as counseling/clinical psychology, positive psychology, and industrial-organizational psychology. These experts may be leveraged for strategic planning conversations with our customers to map your competencies to our framework and make evidence-based suggestions based on your unique challenges.

As you evaluate vendors, stop to consider . . . whether prospective vendors have a scientifically validated approach towards assessments and measurements? Is there scientific evidence to support their outcomes? Are vendors backed by a robust science team that has the qualifications to provide trusting advice and expert guidance specific to your organization?

Organizations promising customers the ability to fully tailor assessments or recraft and reword questions create grand departures from scientifically tested methods. In the same way, data and analytics that are

limited to usage and engagement and assessments that have not been validated against organization outcomes lack the notable and critical component of demonstrable, efficacy-based research and testing.

Coach Quality at Global Scale

Why It Matters

Coaching credentials, capabilities, and ethical standards vary significantly across the coaching industry. When deploying coaching at scale, organizations need assurance of coach quality and the ability to deliver a consistent experience across languages, time zones, and cultural contexts.

BetterUp's Approach

BetterUp is the only personal development and human transformation platform that can scale to support people across the globe. We have the largest network of highly qualified coaches with 3,000+ passionate, ICF-certified, and trained experts, who provide coaching in 70+ countries, 65+ languages, and every inhabited time zone. In addition to scale, BetterUp guarantees quality. BetterUp accepts only 9% of coach applicants through our rigorous 5 step vetting process and all coaches must maintain a 4.5 out of 5 rating. We continually invest in the development of coaches through leading edge training on the latest evidence-based practices. Furthermore, the BetterUp app is localized in 8 languages with more in development: Simplified Chinese, Russian, Spanish, Portuguese, French, German, Japanese, and English.

BetterUp hires highly qualified coaches, but also strives to continually improve their coaching skills by offering:

- 10+ hours of evidence-based training plus frequent refresher training for skill reinforcement and exclusive opportunities for ongoing learning (i.e., Conscious organization Coaching certification)
- Ethics training for technology-driven coaching
- Introduction to the BetterUp model of coaching; ongoing support and resources to drive mastery
- Best practices, tools, and research via our coach community platform and weekly newsletters
- Coaching metrics to provide insights into their impact on members

As you evaluate vendors, stop to consider . . . will my global workforce be supported regardless of language, culture, and location? How does this organization vet coaches beyond ICF-certification?

Uni-national or unilingual platforms lack the ability to support an increasingly global workforce. Boutique coaching vendors often have limited coach pools, but claim global scalability. Organizations that make little to no development investment in the ongoing education of their coaches, or provide them access to new, evidence-based ways to continue to learn and develop as effective coaches cannot provide your people with the innovation and growth they need.

Enterprise Grade Security

Why it Matters

Coaching platforms must have the same rigorous security measures as other enterprise software to mitigate the risks of costly incidents, privacy leaks, reputation risks, and regulatory penalties.

BetterUp's Approach

Security

Protecting your company and employee data is our top priority. We earn [your trust](#) every day, complying with international privacy, security, and confidentiality protocols, regulations, and requirements.

1. BetterUp is EU-US Privacy Shield Framework, GDPR requirements, SOC2 Type II, and CCPA compliant as well as ISO 27001 certified
2. Single sign-on (SSO) available and Multi-factor authentication (MFA) compatible
3. Confidentiality of information is maintained through secure AWS data centers and AES-256 bit encryption
4. Members authenticate via the mobile app using OAuth2 on an SSL connection to application servers; coaches and administrators access data via a secured web portal

As you evaluate vendors, stop to consider . . . will my company be supported by a fully staffed team that meets our Privacy, Risk and Compliance standards?

Organizations without certificates of compliance and insufficient resources to manage compliance regulations and IT security protocols put you at risk. As you evaluate vendors, you should notice if they have the most up to date Information Security standards and qualified personnel to invest in ensuring data and privacy regulations are upheld on a 24/7/365 basis.

Integrations

Why it Matters

Platforms should have the ability to integrate into existing systems to deliver consistency across environments, contexts, initiatives, etc.

BetterUp's Approach

BetterUp fits seamlessly into the way that your organization operates. We integrate with all major HCM systems, including but not limited to Workday, Oracle, UKG, SuccessFactors, to take real-time insights from your systems of record and identify and precisely deliver BetterUp coaching and interventions. Our HCM integrations support rich insights by connecting data across systems to help you better understand impact and effectiveness. BetterUp is in the final stages of becoming a Workday Certified Badged Solution, representing rigorous vetting of security and customer value.

In addition, our flow-of-work integrations with Slack and Microsoft Teams put BetterUp in the places where your employees spend their time. Upcoming integrations with systems like Qualtrics, Salesforce, and LMS systems like Degreed help to position BetterUp as an action layer to help you drive engagement, performance and well-being.

As you evaluate vendors, stop to consider . . . do prospective vendors have an integration strategy in place to maximize insights and leverage HCM, instead of leveraging siloed systems running in parallel?

Your personal development and coaching technology will deliver increased value and truly deliver precision development at scale if it integrates with the systems that you are already paying for. Lack of integration can ultimately end up costing you more.

User Experience

Why It Matters

Technology can be complex; when investing in a tech-enabled coaching partner, organizations need to feel confident that their employees will be given a phenomenal user experience, making them more likely to engage in the offering. Any blockers to this could result in employees disengaging and diminish your return on investment.

BetterUp's Approach

We know behavior change takes effort. That's why at BetterUp, behavioral science is at the core of our member experience design and platform. We create a beautifully designed and easy to navigate experience for members and embed a scientific approach into each design and UX choice we make — from the workflow users are led through in their coaching journey to nudges and finally, actions facilitating accountability and recurrence in developmental engagement.

BetterUp has been providing a delightful user experience since our inception in 2013 by learning from our members and continuously improving on the experience with their feedback. Our platform design and features are prioritized to drive user engagement and satisfaction.

We believe that coaching platforms should be accessible to all, easy to navigate, intuitive, and enjoyable. The BetterUp platform was built to deliver a positive experience for everyone – from your employee using BetterUp coaching week by week, to the leader of your coaching initiative who is responsible for analyzing impact and insights. Finally, we also strive to make our platform inclusive and accessible to all. We have an accessibility team composed of developers, designers, and testers that continue to work to build a transformational experience that works for everyone.

As you evaluate vendors, stop to consider . . .are the potential solutions designed with the science of human behavior change at the heart of it? Is this solution compliant with WCAG-AA?

Tech-enabled coaching platforms that have been created in recent years are in the early stages of ironing out the user experience for both employees and program administrators. Vendors that haven't made the investment in complying with WCAG-AA fail to provide an inclusive experience to accommodate those with limited sight or mobility, deaf/hard of hearing, and/or learning disabilities.

Analytics and Insights

Why It Matters

Growth can be quantitative, not just qualitative. With the right tools and evidence-based practices in place, your organization can tactically prove organizational growth over time. Likewise, allowing your employees to gain insight into their own growth will foster accountability and validate the effort that they put into their own behavior change.

BetterUp's Approach

Coaching impact is proven as early as Day 1. As soon as an organization launches BetterUp coaching, the administrators are able to track program participation, engagement, satisfaction, and completion directly in the platform – in real-time.

As employees continue to engage in coaching sessions, the platform collects anonymized, aggregated data which can provide insights about your people that you may not get otherwise. Our team includes behavioral science PhDs, who serve as our clients' Behavioral Officer, partnering with them to evaluate insight and explore progress towards goals and organizational KPIs.

In sum, BetterUp offers 4 critical layers of quantitative data: Engagement, Satisfaction, Behavioral analytics and growth, and organization Impact. Additionally, BetterUp continuously captures and anonymizes qualitative data from members and coaches. This allows us to provide our partners with additional depth into the impact and experience of the intervention.

With the data we have collected across our partnerships, BetterUp has proven a 6.4x (or more) ROI as a result of our coaching solutions. ROI means something different for every client but in general, we consider ROI to be measured by member utilization of our platform, user experience, and sustained gains in feedback skills.

As you evaluate vendors, stop to consider . . .do prospects have evidence or a report that validates the methodology behind their assessments, developmental interventions, and outcomes measurement?

An organization that claims to be able to increase engagement or retention should be able to back up those claims with credible behavioral science on how they get your workforce from point A to point B.

Without data and analytics, how are you able to prove that your investment is delivering the desired result? Vendors must provide insights and analytics at multiple levels to allow your employees, administrators, and leadership stakeholders to make informed decisions at both the personal and organizational level.

Financial Viability

Why It Matters

Before investing in a new partnership, you want to know your prospective vendor has the financial longevity to evolve with your needs year after year. This is especially important when partnering with high growth companies, as you want to ensure the provider you are investing in will still be in organization to deliver their promise of value.

BetterUp's Approach

BetterUp most recently secured \$300 million in Series E funding, bringing our total funding to \$600M and providing us with a strong cash balance. This latest financing was led by Wellington Management, ICONIQ Growth, and Lightspeed Venture Partners with participation by existing investors Salesforce Ventures and Mubadala Investment Company along with Sapphire Ventures, Morningside Group, SV Angel, and PLUS Capital. The company is [now valued at \\$4.7 billion](#).

We believe that our recent fundraising is a strong signal from our investors and the market about the value we are providing our customers and our long-term viability as an organization. This investment allows us to continue to innovate by investing heavily in our company and platform to address the needs of our customers. In addition, the following details speak to our financial solvency:

1. Last year, we surpassed \$100M in ARR. In FY22, we beat our bookings and revenue goals each quarter.
2. We are still expecting to grow at least 75% year-over-year, and are on track to meet/beat our financial and operating plans for the year.
3. In 2021, we hired our President of Field Operations, Marc Maloy, who has taken organizations like Glint and Instructure through rapid growth
4. During mid-2021, BetterUp acquired Motive and Impraise to help us accelerate our growth as the leader in human transformation and precision development.
5. Also in 2021, BetterUp expanded its global operating presence by opening offices in London, Amsterdam, and Munich.

As you evaluate vendors, stop to consider . . . whether vendors have the necessary financial backing to support your organization' growth and will they consistently innovate and scale their solution?

Watch out for companies without reputable investors and a limited client portfolio. Boutique providers and organizations with insufficient funding will have a hard time scaling solutions.

Operational Infrastructure

Why It Matters

We know from our direct experience delivering 1.5 million+ coaching sessions across the globe and serving over 600 organizations that it takes strong internal operations to manage all aspects of the client experience from designing a consumer-grade product to managing customer support requests.

BetterUp's Approach

BetterUp has invested in building an infrastructure that can deliver a consistent, high quality customer experience on a massive scale. We have a robust product and engineering team, a Customer Success team to manage deployments, a Customer Support organization that is available 24/7/365, and a dedicated Coach Operations team that exists to recruit, train, and manage our global coach network. In addition, we have the deepest bench of PhDs and behavioral experts of any provider, to partner in the design and development of customized programs.

BetterUp's mission is to be your long-term strategic partner and meet your needs as they evolve over time.

As you evaluate vendors, stop to consider . . . if vendors can remove the heavy administrative burden of a personal development platform at scale? Do these vendors have a dedicated account team to design, deliver, and measure your coaching program?

Companies with very lean internal operations and low client service to customer ratios will find it difficult to support deployments, especially when cohort sizes are bigger than 25 and global in nature. Boutique organizations and early stage companies will lack the infrastructure to service multiple clients and uphold quality.

Continuous Innovation

Why It Matters

In a world of rapid technological advancement, new technology emerges every 18-24 months. Progressive organizations need partners who are not only changing and adapting to the latest technology but also leading and creating the future.

BetterUp's Approach

BetterUp is the leading innovator in the industry, with our current roadmap focused on an enterprise-wide Human Transformation Platform rooted in human connection, augmented growth, and talent intelligence. Recent developments include (but are not limited to): (1) our Studio Workshops which are experientially rich, emotionally resonant, measurably effective 1-to-many coaching experiences to accelerate member self-actualization, (2) more personalized learning journeys for members from new learning modalities to deeper and more nuanced analytics around DEIB and sales performance (3) increased focus on well-being and mental fitness, and (4) opportunities for community and connection for our customers' employees.

BetterUp Labs, a dedicated research arm, is focused on collaborating with luminary researchers to study new areas of human performance and integrating the research back into our design.

As you evaluate vendors, stop to consider . . . what do prospective vendors have on their roadmap? Do they have a deep set of research and methods to inform their product direction?

Companies that only draw from a narrow set of research and methods that don't constantly evolve will eventually fall behind or won't be able to provide your employees with state of the art tools and techniques for human transformation. Companies with under-resourced engineering teams will struggle to keep pace with innovation and may quickly become outdated technology.

Look for a partner that values innovation in personal development and human transformation at scale. A vendor should be continuously researching and contributing to the Behavioral Sciences field to provide the most effective development while continuously learning more about human behavior growth.

Conclusion & Additional Resources

At BetterUp, we are proud of our industry-leading position in customer retention, and the natural and consistent expansion of our customer relationships. Our partners know that BetterUp is the only coaching solution able to strategically support coaching and innovate at all levels of the organization, at any global location, from independent contributors to C-suite executives.

Should you kick-off an RFP process, we recommend leveraging the following framework and questions to validate the value of prospective vendors:

Key Dimension	Suggested RFP Questions
Holistic Design	<ul style="list-style-type: none"> Describe your approach to providing one-on-one, specialist (including areas of specialization), and on-demand coaching. Provide detailed information on your supplemental learning materials Provide information on any assessments you use. How is your approach designed to drive organizational outcomes? Can your solution address more than measurements of engagement or productivity? Describe how your solution can address complex organizational issues like building a coaching culture, increasing organizational agility, resilience etc.
Scientific Rigor	<ul style="list-style-type: none"> What evidence or scientific research is your methodology and approach based on? What evidence do you have to demonstrate the statistical reliability and validity of your assessments? What is the size of the data set that provides the basis for benchmarking data? How can you help us identify which individuals are most ready to benefit from coaching?
Coach Quality at Global Scale	<ul style="list-style-type: none"> How global is your coaching network? How many languages can they support, and in how many countries? How do you attract and retain the best coaches on your platform? How do you support people with special needs (e.g., hearing or visual impairment)? What is your approach to select and train coaches, and manage quality?
Enterprise Grade Security	<ul style="list-style-type: none"> How do you ensure data privacy and security? Are you compliant with GDPR, SOC-2, CCPA, and ISO 27001? Do you have documented procedures to protect the confidentiality, integrity and availability of client data, including technical and organizational measures?
User Experience	<ul style="list-style-type: none"> What is the user experience? Is the platform easy to use? What improvements are you making to the user experience? Do you have user testimonials? What is your user NPS? How do you prove user satisfaction and engagement? Is your solution compliant with Web Content Accessibility Guidelines? Please describe the level.
Analytics and Insights	<ul style="list-style-type: none"> Describe the insights and analytics that will be available at the individual, team and organizational levels. What data and measurements can you provide? Is it real-time? Are you able to measure ROI? How do you measure ROI?
Financial Viability	<ul style="list-style-type: none"> How can you prove your financial stability and viability? How many enterprise clients do you have?

Operational Infrastructure

- How is your organization organized to deliver your services? Provide high level org structure and headcount of functional organization areas, e.g. Product Development, Coach Training and Development, Account Management, Customer Support, Research and Development.
- How many employees do you have?
- How are potential ethical issues identified and escalated in order to be appropriately managed?

Continuous Innovation

- What investments are you currently making in research partnerships, product development and methodology improvement?
- What innovations and enhancements do you have planned for the future?
- What improvements have you made to your offering over the past 12-18 months?
- How are you using AI and ML or other emerging technologies?