

The role of relational mecha-  
nisms in the executive coaching  
process on client outcomes in  
distance coaching relationships

# Summary

**What we found:** In our study of distance coaching relationships, we discovered that clients' readiness for coaching and trust in their executive coach significantly predict both personal skill development and improved work performance. Furthermore, the study revealed that perceptions of deep-level similarity between coach and client may moderate these relationships.

**Why it matters:** These results highlight the significance of client readiness and trust in executive coaching relationships, particularly in the context of distance coaching. Understanding these relational dynamics can enhance the effectiveness of executive coaching initiatives and contribute to improved outcomes for both individuals and organizations in the Future of Work.

**What next:** Organizations and leaders investing in executive coaching can leverage these findings to enhance the effectiveness of coaching programs. They should prioritize evaluating candidates' readiness for coaching, focus on building trust throughout distance coaching relationships, and consider perceptions of similarity between coach and client. By doing so, they can maximize the impact of coaching interventions on personal skill development and work performance in today's remote and hybrid work environments.

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# The role of relational mechanisms in the executive coaching process on client outcomes in distance coaching relationships

Executive  
coaching  
process

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## Abstract

**Purpose** – We examine the relationships between clients' level of coaching readiness and trust in their executive coach and increases to both personal learning improved work performance. Distance relationships, the setting for this study, epitomize the norms of the New World of Work (NWoW), but also provide particular challenges for building trust and recognizing similarities between client and coach.

**Design/methodology/approach** – This study investigates distance coaching relationships in matched-pairs, longitudinal investigation of formal executive coaching.

**Findings** – Results support the proposed moderated mediation path. Findings reveal that both coaches' perceptions of client readiness for coaching and client trust in coach each predict both client personal skill development and performance improvement.

**Research limitations/implications** – While important toward gaining a better understanding of the relational functioning of distance coaching relationships, inclusion of only distance relationships may truncate the generalizability of our findings.

**Practical implications** – The study's findings have practical implications for organizations that invest in executive coaching with regard to the importance of evaluating the candidates' readiness for coaching before the assignment, trust-building throughout distance coaching relationships and perceptions of similarity on client coaching outcomes.

**Originality/value** – Distance relationships, the setting for this study, provide particular challenges for building trust and recognizing similarities between client and coach and the current investigation points to the relevance of these relational mechanisms to client outcomes. In so doing, this study explores how perceptions of deep-level similarity between a coach and client may serve as moderators of these relationships.

**Keywords** Performance, Employee development, Relationships, Workplace learning, E-learning, Coaching

**Paper type** Research paper

In 2023, there are approximately 93,000 certified coaches worldwide in an industry estimated to reach a value of \$20 billion (Zhou, 2023), representing a market revenue ten times larger than a decade ago and one of the fastest-growing sectors (ICF, 2012; Kotte and Bozer, 2022). Of this market, it is estimated that 75% of all coaching services are provided through distance/remote coaching (Gitmux, 2023). Little academic research on distance coaching exists (Burrous, 2021), leading to discussion of *uncharted territories* of coaching highlighting the need for further investigation into remote coaching relationships (Kotte and Bozer, 2022). Many coaching delivery innovations have developed in recent years (Irving, 2021), in large



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part owing to mandated isolation caused by the Covid-19 pandemic. As we emerge from the pandemic into a world characterized by work-from-home jobs, geographically-dispersed teams, and a new generation of workers in need of development, distance coaching has been embraced by global organizations. Now, organizational scholars must develop a rigorous understanding of what makes distance coaching relationships tick. We are interested in determining a better understanding of the mechanics of what makes these distance coaching relationships tick, and in so doing, we are hopeful that this research will contribute to a more nuanced understanding of how to approach coaching more generally in the post-Covid world.

Distance coaching offers several advantages, including affordability, availability, and scalability (Burrous, 2021); and the capacity to implement coaching programs efficiently and effectively (Eckstrom and Wirth, 2019). Remote coaching's flexibility makes it a preferred option for many employees (van Collier-Peter and Manzini, 2020). These advantages, however, are accompanied by challenges including inhibited opportunity to develop trust (Ghods and Boyce, 2013), potential for lower coachee engagement and motivation (Hui, 2015), and fewer social cues, which have demonstrated importance in coaching relationships (Athanasopoulou and Dopson, 2018). Owing to the reduced social interactions and visual cues in remote coaching as compared with face-to-face (F2F) coaching, new skill development becomes essential (Makarius and Larson, 2023).

Individuals and organizations invest in executive coaching as a method to improve learning and effectiveness, in hopes of making a more meaningful impact and addressing the challenging demands of careers in today's dynamic business environment (Gabriel *et al.*, 2014). But as is common with rapidly-expanding fields, empirical research has not kept pace with the growing industry nor the volume of practitioner literature touting the benefits for coachees and organizations. Until recently, the coaching literature was described as disjointed and lacking in empirical rigor and theoretical contributions (Theeboom *et al.*, 2014). Ely *et al.* (2010) note that the uniqueness of coaching relationships in existing studies (e.g. purpose, duration, internal vs external coach) and the breadth of evaluation outcomes for different stakeholders (e.g. client, organization, coaches, coaching organizations) make it difficult to evaluate coaching effectiveness.

The purpose of this study is to contribute to the executive coaching literature by examining motivational characteristics of the client. Bozer and Jones (2018) lament that few studies have explored the impact of coaching over multiple time points. By doing so, our study examines executive coaching as a developmental *process*, which also meets Ely *et al.*'s (2010) call for research to focus on formative assessments where aspects of the client, coach, client-coach relationship and coaching process are studied so that knowledge about the process can inform and guide individuals on how to effectively approach coaching to achieve desired results.

### **Hypothesis development**

Coaching is about establishing a helping relationship between a coach and the person with whom the coach is engaged – a client (Moen and Federici, 2012). The Center for Creative Leadership defines executive coaching as a “formal one-on-one relationship in which the coachee and coach collaborate to assess and understand the coachee and his/her leadership development tasks, to challenge current constraints while exploring new possibilities, and to ensure accountability and support for reaching goals and sustaining development” (Ting and Hart, 2004, p. 116). Distinct from other developmental relationships, Feldman and Lankau (2005) assert that executive coaching is a means of facilitating learning and helping executives develop themselves to attain goals and become more effective. Coaches are not technical experts (advisors) nor do they evaluate job opportunities for the client (career counseling). Executive coaching differs from mentoring in that coaches are from outside of the organization, interactions are more structured and formal, and relationships are based on a paid contractual agreement. Also, unlike formal mentoring programs that typically have a

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mentoring program coordinator helping to design and oversee the program, organizationally-sponsored coaching relies predominantly on external coaching validations for selection of coaches, and rarely provides supervision of these external coaches.

Researchers have utilized [Kirkpatrick's \(1996\)](#) framework for evaluating training effectiveness as a method to categorize various coaching outcomes (e.g. affective, learning, behavior change, and organizational results). In the current study, we focus on learning and behavioral change as outcomes, and the influence that affective reactions have on them. Affective reactions are measures of clients' attitudes about the coaching experience, such as satisfaction with the coach or relationship. Learning outcomes include the amount of knowledge acquired or skills improved as a result of coaching. Behavior outcomes assess the extent to which participants change their on-the-job behaviors after being coached.

[Theeboom et al.'s \(2014\)](#) meta-analysis demonstrated that coaching has significant individual effects, but also revealed a high level of between-study heterogeneity and that effects of coaching vary considerably, particularly in the skill development (learning) and performance (behavioral change) categories. They called for future research providing insight into *how* (as opposed to *if*) coaching works and suggested integration of theory from the motivation, mentoring, and training literature to examine client characteristics that enable better coaching experiences and working alliance between a coach and client. Researchers have suggested that the identification of moderator variables could increase our understanding of relationship conditions that facilitate the achievement of goals and/or benefits from coaching (e.g. [Baron and Morin, 2009](#); [Maurer et al., 1998](#)). To test this, we examine the effects of clients' degree of readiness for coaching and trust in the coach on personal learning and work effectiveness outcomes, and we explore how coach-client deep-level similarity may moderate these relationships. By studying perception of improved effectiveness, we are able to gain an understanding of an important contributor to not only employee task performance, well-being, and satisfaction ([Day and Qing, 2009](#); [Hollenbeck and Hall, 2004](#)), factors that ultimately contribute to a more adaptive and resilient workforce.

### *Client readiness for coaching*

Readiness reflects a coachee's preparedness and openness to engage in the coaching process, which is fundamental for effective learning and personal growth. Clients are active participants in the executive coaching process, setting developmental goals for the relationship. Coaches serve as facilitators of clients' self-development and help clients build ownership of their progress toward goals ([Gabriel et al., 2014](#)). Coaching, training, and mentoring literature all emphasize the importance of learners' effort and commitment to participate in the learning process. [Kilburg \(2001\)](#) drew on healthcare and counseling psychology literature to identify client commitment to a path of progressive development as *the* fundamental assumption of an effective coaching process and effective outcomes. This commitment involves "the psychological motivation and associated behaviors that are necessary to move a human being toward defined goals over a reasonably extensive period of time" (p. 257). Relatedly, expectancy theory ([Vroom, 1964](#)) explains that coachees with high self-development motivation likely expect that putting effort into the coaching relationship will result in increased development, which is associated with valued rewards ([Boyce et al., 2010a, b](#)). Motivation to learn and attitudes toward training and development are important predictors of development activity and training behavior (e.g. [Hurtz and Williams, 2009](#)). Further, client motivation specific to the context of a coaching relationship may influence coaching effectiveness ([Bozer et al., 2013](#)).

Proactive behaviors in developmental relationships influence the extent of development received and positive outcomes from the relationship ([Turban and Dougherty, 1994](#)). In a study of formal mentoring relationships, [Wanberg et al. \(2006\)](#) theorized that proactive protégés are likely to adhere to meeting schedules, be more prepared for meetings, and be

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more goal-oriented in interactions with mentors. Though their study did not find a significant relationship, it is worth noting that they measured protégé proactivity as a personality trait before the start of the mentoring relationship rather than as behaviors during the relationship. While traits are important, the environment may constrain an individual's predisposition from being manifested into actual behavior. It is worth noting that an earlier review found that participation in a coaching relationship has a significant positive effect on skills and performance, but the process of participation was not assessed (Theeboom *et al.*, 2014). Athanasopoulou and Dopson's (2018) more recent review considered intrapersonal characteristics that affect participation, but only considered coach characteristics. Our study examines learning by assessing personal learning (Lankau and Scandura, 2002), particularly is the acquisition of new skills and abilities that enable better working relationships. Additionally, improved job effectiveness is a desired outcome of an executive coaching relationship for both individuals and organizations. We propose that active participation operationalized by readiness for coaching could have a particularly important effect on changing and improving these learning and behavioral outcomes (Nicolau *et al.*, 2023).

*H1a.* Client degree of readiness for coaching will be positively associated with personal learning.

*H1b.* Client degree of coaching readiness will be positively associated with improved workplace effectiveness.

#### *Client trust in coach*

Trust forms the cornerstone of a successful coaching relationship, fostering a safe environment for honest self-reflection, learning, and application of new insights. Trust is critical in coaching relationships, owing to coachee vulnerability, confidentiality of information, and the feeling of security clients require to freely share within the relationship (Muthuswamy, 2023). Trust becomes even more essential for virtual collaboration (Benda *et al.*, 2023), more so if the two parties have never met face-to-face (Ghods and Boyce, 2013), as is the case with most remote coaching arrangements. Interpersonal trust is a multidimensional construct consisting of competency-based (cognitive) and emotion-based (affective) trust (Johnson and Grayson, 2005; McAllister, 1995).

Cognitive trust is based on knowledge positive expectations regarding another individual (Jones and George, 1998), developing through demonstrations of competence, reliability, and dependability over time in a dyadic relationship (McAllister, 1995). Cognitive trust becomes even more important when a client perceives risk (Bove and Johnson, 2000), such as the sharing of sensitive personal or confidential information with an executive coach. Affective trust is grounded in interpersonal care and concern for the other individual or an emotional bond and serves as the foundation for a strong interpersonal relationship.

Trust development is integral to the formation of a productive coaching relationship that enables a client to take risks to learn, develop, and change (Baron and Morin, 2009; Markovic *et al.*, 2014). When clients develop trust in their executive coaches, they are more likely to be honest about their strengths and weaknesses, share sensitive information, and be more open to receiving feedback (Boyce *et al.*, 2010a, b; Gyllensten and Palmer, 2007; Kampa-Kokesh and Anderson, 2007). Thus, trust represents one of the most important dyadic elements of effective coaching relationships (Lai and Palmer, 2019). We propose that client trust in coach serves as a motivating mechanism to enable greater personal learning due to the willingness of the client to be open to the coach's feedback. Fostered as a result of trust, high-quality coaching relationships result in improved coachee performance (Lawrence, 2017; Lyons and Bandura, 2022). For these reasons, we predict that greater trust in a coach will facilitate change and risk taking in new behaviors that contribute to improved work performance.

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Personal learning and effectiveness are consistent with the coaching framework adopted by Jones *et al.* (2016) and Bozer and Jones (2018), inclusive of as skill-based and result-oriented outcomes, respectively.

H2a. Client degree of trust in coach will be positively associated with personal learning.

H2b. Client degree of trust in coach will be positively associated with improved workplace effectiveness.

### *Personal learning as a mediator*

We hypothesize that learning is a proximal outcome that mediates the relationship between client motivational characteristics and the more distal outcome of improved workplace effectiveness. Acquisition of knowledge and skills (i.e. learning) throughout the coaching relationship facilitates the trial of new work role attitudes and behaviors that over time produce improved work performance. Coachee readiness is akin to motivation for training (Bozer and Jones, 2018), and MacKie (2015) found that readiness predicts skill-based learning outcomes in coaching. Adding to this, Bozer and Jones' (2018) review suggests that coachee learning influences performance. This aligns with the general principle that coaching facilitates learning, thereby improving performance (Lawrence, 2017) and that the effectiveness of coaching lies in its capacity to provide a mechanism through which coachees may translate learning into performance benefits (Jones *et al.*, 2016; Nicolau *et al.*, 2023). This is consistent with research on mentoring that has demonstrated the role of personal learning as a mediator between mentoring functions and job-related outcomes (Lankau and Scandura, 2002).

Despite the rationale presented earlier suggesting the importance of trust in coaching relationships, several coaching studies (i.e. Boyce *et al.*, 2010; Gan and Chong, 2015) found that coachee perceptions of trust in their coach did not significantly predict coaching effectiveness and performance following coaching. However, as summarized by Bozer and Jones (2018), trust in one's coach produces higher expectations that the coach will maintain confidentiality and therefore empower the coachee to engage in more vulnerability within the coaching relationship. Approaching a developmental relationship with vulnerability enhances the developmental process (Lofthouse and Thomas, 2014) and promotes learning (Rigolizzo *et al.*, 2022). Thus, higher levels of learning are made possible by vulnerability expression grounded in trust, which then predict coachee job performance outcomes. The connection between learning and behavioral performance is needed, especially in remote learning situations (Qiu *et al.*, 2022).

H3a. Personal learning will mediate the relationship between client readiness for coaching and improved job performance.

H3b. Personal learning will mediate the relationship between client degree of trust in coach and improved job performance.

### *The role of client-coach similarity*

Another factor that may influence the working alliance in a coaching relationship is the degree of perceived similarity. Boyce *et al.* (2010a) discuss the need for a good fit between coach and client and that commonality is one way to examine fit. Their premise is based on Byrne's (1971) similarity-attraction theory that people are attracted to others similar to themselves. Interpersonal perceptions literature suggests that similarity facilitates coordination of members' actions in the pursuit and accomplishment of goals and enables more positive relationship functioning (Jowett and Clark-Carter, 2006). Individual characteristics have a strong influence on degree of attraction between two people in a



developmental relationship in driving perceptions of each other and expectations for how the other will behave (Young and Perrewe, 2000). Lankau *et al.* (2005) found that perceived deep-level similarity (similarity in characteristics such as values, personality, and attitudes) among mentors and protégés positively influenced the extent of mentoring provided in the relationship.

Bozer and colleagues have taken initial steps toward advancing understanding about the role of similarity among coaching relationships. First, Bozer *et al.* (2015) hypothesized that perceived similarity would be positively related to positive attitudinal and behavioral outcomes. They found nonsignificant relationships, with the exception of coach's perceived similarity positively associating with supervisor ratings of task performance. Despite these limited results, Bozer and Jones (2018) reported "similarity of personal characteristics [...] fosters relationships of mutual trust and effective interpersonal communication." (p. 352). Our study, further explores the potential of perceived similarity in a distance executive coaching relationship to influence the effects of motivational characteristics on personal learning and personal learning to improved work performance as a research question:

*RQ.* Does perceived similarity among client and coach strengthen the effects of readiness and trust on personal learning, and of personal learning on improved effectiveness?

## Method

### *Research participants and procedure*

Respondents participated in a one-year formal, distance coaching program offered by an organization specializing in distance coaching. The program was designed to help executives, managers, and professionals establish a vision and plan for where they wanted to be in their business life and develop the leadership skills to achieve their goals. After an initial intake session of 90 min to obtain background information and establish goals, coaching sessions took place via telephone or web-based video meeting once a month for 45–60 min. The first survey was administered at the beginning of each client's one-year coaching contract ( $T = 0$ ), the second survey after the pair had completed approximately six months of coaching ( $T = 1$ ), and the third survey at the completion of the one-year contract ( $T = 2$ ). Each online survey was available to participants for two weeks after it was announced. The organization invited all coaches and their clients to participate in the study over a period of two years, and participation in both the coaching and in the study was voluntary. Fourteen coaches and 196 clients participated in the study, producing 196 matched coach-client dyads for analysis. Coaches each facilitated from 1 to 28 client relationships, with an average of 13.5 clients per coach ( $SD = 9.30$ ). Although in 124 instances (63.27% of the relationships) the coach had previously worked with other members of the client's organization, in the majority of the cases (154 instances, 78.6% of the coaching) the coach had no previous relationship with the client before initiation of the coaching relationship. 54.6% of clients were college graduates, and 16.8% held a graduate degree. Clients were 67.9% male and 32.1% female, with an average of 88 months in their current role.

### *Measures*

The full text of all survey items and additional study materials can be found in the online appendix hosted by the Open Science Framework ([https://osf.io/q5vne/?view\\_only=18c7d77784614b08bcc2df754015f21b](https://osf.io/q5vne/?view_only=18c7d77784614b08bcc2df754015f21b)). Unless otherwise stated, all scales were rated on a 5-point Likert-type scale ranging from strongly disagree to strongly agree.

*Client readiness for coaching.* Coaches reported client readiness for coaching using a six-item instrument created for this study based on measures by Maurer *et al.* (2003) on learning preparedness and development motivation in conjunction with input from coaches in the



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coaching organization. Sample items include “This client is motivated to put time and energy into his/her self-development” and “This client is taking concrete action steps to move toward his/her development goals.” Accordingly, this instrument focuses on a client’s motivation and commitment to self-improvement openness, receptiveness, and proactive engagement in trying new ways of doing things. These items assess a client’s mindset and actions toward personal growth, indicating their preparedness and suitability for a coaching process. Coach reports of client readiness were collected at the mid-year point (Time 1), to give coaches time to observe readiness attitudes and behaviors. Exploratory factor analysis (EFA) revealed one factor with coefficients ranging from 0.697 to 0.866 which explained 66.73% of the variance. Internal consistency was high with Cronbach’s alpha of 0.92.

*Client trust in coach.* Also at Time 1, clients reported the degree to which they trusted their coach. Responses were captured using a modified version of an instrument on patient trust in physicians (Thom *et al.*, 1999) based on the work by Markovic *et al.* (2014) on a model of trust on the coaching context and input from the coaching organization. Clients responded to nine items, including “I believe my coach has the skills to operate as an effective guide for me,” “I trust that confidential information I share with my coach stays confidential,” and “My coach is reliable in responding to my communication and information requests.” Changes made to the scale reflected the different context (i.e. coach not physician), appropriately representing a change in context (Heggestad *et al.*, 2019). EFA revealed one factor with coefficients ranging from 0.57 to 0.80, which together explained 56.26% of the variance. Internal consistency was high with Cronbach’s alpha of 0.90.

*Perceptions of similarity.* Both the coaches and clients reported their perception of the degree to which they are similar to their coaching partner. Respondents reported similarity on seven characteristics, including work values, personal expertise, and problem-solving approach using the seven-item instrument from Lankau *et al.* (2005). The 5-point Likert-type scale ranged from “not at all similar” to “very similar;” responses from both parties were collected at Time 1. The scale was abbreviated to six characteristics due to space restrictions on the survey and relevance of the characteristics to an executive coaching engagement. Cronbach’s alpha was 0.91 for coaches and 0.83 for clients.

*Personal learning.* Clients rated their personal learning at Time 2 using the six-item skill development subscale from Lankau and Scandura’s (2002) personal learning instrument. Sample items include “I have developed new ideas about how to perform my job,” and “I have expanded the way I think about things.” Cronbach alpha suggests reliability at 0.83.

*Work effectiveness improvement.* Clients reported perceptions of their work effectiveness prior to starting the coaching relationship (Time 0) and again at the end of coaching (Time 2). Responses were captured using Mott’s (1972) six-item instrument originally published in a volume focusing on workplace effectiveness. Respondents rated their level of effectiveness on six dimensions using a 7-point Likert-type scale from “very poor” to “outstanding.” The six survey items—capturing the respondents’ perceptions of their ability to work independently and cooperatively, solve problems, motivation to work hard, potential for promotion, and overall performance—collectively capture the construct of perceived work effectiveness. They encompass essential workplace competencies, including personal attributes (independence, motivation), interpersonal skills (teamwork), cognitive abilities (problem-solving), and career development (promotion potential). This multifaceted approach allows for a comprehensive assessment of an individual’s perceived effectiveness, making the instrument well-suited for evaluating changes in self-perception before and after coaching sessions. Accordingly, effectiveness reported at Time 0 was controlled in order to analyze perceptions of improvements to effectiveness, consistent with previous research (e.g. Schneer and Reitman, 1994) [1]. The scale demonstrated internal consistency, with Cronbach’s alpha of 0.70 at Time 0 and 0.83 at Time 2.

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*Control variables.* Client sex and education were controlled, as previous research on developmental relationships has shown sex and education to be associated the extent of benefits received (Kammeyer-Mueller and Judge, 2008). Additionally, role tenure and previous coaching relationship could affect effectiveness, learning, and client readiness, warranting inclusion as control variables.

#### *Analytic plan*

We use hierarchical multiple regression and polynomial regression to test [Hypotheses 1-2](#) and the [Hayes' \(2013\) PROCESS](#) macro for SPSS to test [Hypothesis 3](#) and evaluate our research question.

### **Results**

A confirmatory factor analysis (CFA) conducted in the software R verified that the factor structure of the study's observed variables represents the underlying latent constructs. The items representing each latent factor were loaded onto the respective latent construct for each of the study variables. All items loaded on their *a priori* designated factor, with the CFA indicating adequate fit of the model ( $\chi^2 = 920.77$ ,  $df = 607$ ,  $p = 0.000$ ;  $NC = 1.517$ ;  $RMSEA = 0.052$ ,  $CI_{90\%} = 0.045$  to  $0.059$ ;  $CFI = 0.92$ ;  $TLI = 0.92$ ). Together with the previously-reported EFA results and high internal consistency, results provide confidence in the appropriateness of the measurement model. We further tested the distinctiveness of the two outcome variables by comparing the fit of the four-factor model (trust, client readiness, personal learning, and effectiveness) with an alternate model via structural equation modeling (SEM) in R. We compared the original model with a three-factor model, where we loaded personal learning and client effectiveness onto the same latent factor. The fit of the hypothesized model was superior to the alternate model, with the four-factor model demonstrating improved fit as assessed by CFI (0.861 vs 0.813), TLI (0.847 vs 0.797), RMSEA (0.071 vs 0.082), and SRMR values (0.065 vs 0.071).

Finally, as the clients are nested within coaches, we tested for coach-level effects on our study variables. Overall, there exists substantial variance within coaches but no observable variance between coaches (less than 0.002%) with the exception of coach ratings of client readiness ( $ICC(1,1) = 0.235$ ). Coaches tended to differ in their average client readiness ratings, but the bulk of variance in these ratings was attributable to (true) client differences in readiness rather than coach rating style; this was confirmed by the non-significant difference between the fit of the multilevel model compared to the original model ( $\chi^2$  difference less than 0.005,  $p > 0.94$ ). These values provide confidence in the distinctiveness of each coach-client relationship, as coach membership did not influence relationships between variables. We then proceeded with hypothesis testing.

Descriptive statistics and intercorrelations among study variables appear in [Table 1](#).

[Hypotheses 1](#) and [2](#) were tested using hierarchical multiple regression analysis. Client sex, client education, client tenure in work role, and coach prior experience with client are controlled in Step 1, and we entered client readiness for coaching and client trust in coach in Step 2. [Hypothesis 3](#) was tested by running an additional regression model to assess improved effectiveness (shown in [Table 3](#)) where personal learning was entered as a mediator variable on Step 3, after control variables in Step 1 and readiness for coaching and trust in Step 2. The indirect effect of the independent variables on the dependent effectiveness variable was confirmed using the mediation procedure outlined by [Hayes \(2013\)](#).

[Tables 2](#) and [3](#) display the standardized coefficients and standard error for regression models predicting personal learning and effectiveness improvement, respectively, as well as changes in  $R^2$  and  $F$ -ratios for each step of the hierarchical regression.

Variable	<i>M</i>	<i>SD</i>	1	2	3	4	5	6	7	8	9	10	11
(1) Client sex (1 = male, 2 = female)	1.32	0.468	–										
(2) Client education	3.85	0.735	–0.21**	–									
(3) Client tenure in current role	87.99	85.99	0.03	–0.22**	–								
(4) Coach previous experience with client	1.68	8.75	0.02	–0.02	0.07	–							
(5) Client trust in coach (rated by client at Time 1)	4.68	0.38	0.12	–0.20**	–0.01	0.12	(0.90)						
(6) Client coaching readiness (rated by coach at Time 1)	4.29	0.58	0.02	–0.01	–0.01	0.04	0.15*	(0.92)					
(7) Coach similarity to client (rated by coach at Time 1)	3.40	0.86	0.18*	–0.09	0.09	–0.05	0.09	0.54**	(0.90)				
(8) Client similarity to coach (rated by client at Time 1)	3.60	0.66	0.16*	–0.23**	0.02	0.00	0.44**	0.21**	0.31**	(0.82)			
(9) Client personal learning (rated by client at Time 2)	4.23	0.51	0.13	–0.08	0.01	0.00	0.32**	0.27**	0.22**	0.38**	(0.83)		
(10) Client effectiveness (rated by client at Time 0)	5.66	0.60	0.10	0.04	–0.03	0.07	0.19**	0.09	0.07	0.22**	0.18*	(0.70)	
(11) Client effectiveness (rated by client at Time 2)	5.72	0.65	0.20**	–0.10	0.02	0.04	0.30**	0.25**	0.25**	0.39**	0.57**	0.46**	(0.83)

**Note(s):** \* $p < 0.05$ , \*\* $p < 0.01$   
Cronbach's alpha reported in parentheses along the diagonal  
**Source(s):** Designed by authors

**Table 1.**  
Means, standard deviations, alphas and intercorrelations between study variables

Executive coaching process

Predictors ( <i>N</i> = 196)	Personal learning <sup>3</sup> Model 1		Personal learning <sup>3</sup> Model 2	
	$\beta$	SE	$\beta$	SE
<i>1. Control variables<sup>b</sup></i>				
Sex <sup>1</sup>	0.117	0.080	0.057	0.073
Education <sup>1</sup>	-0.059	0.052	0.019	0.048
Tenure in current role <sup>1</sup>	-0.002	0.000	0.019	0.000
Coach prior experience with client <sup>1</sup>	-0.003	0.004	-0.037	0.004
Change in $R^2$	0.000			
Adjusted $R^2$	0.000			
Change in <i>F</i> -ratio				
<i>2. Main effects (Model 1)</i>				
Client coaching readiness <sup>2</sup>	0.227***	0.059	0.204**	0.072
Client trust of coach <sup>2</sup>	0.280***	0.093	0.131	
Change in $R^2$	0.143			
Adjusted $R^2$	0.137			
Change in <i>F</i> -ratio	16.168***			
<i>3. Moderator effects (Model 2)</i>				
Client similarity to coach <sup>2</sup>			0.290***	0.069
Coach similarity to client <sup>2</sup>			0.038	0.054
Change in $R^2$			0.058	
Adjusted $R^2$			0.188	
Change in <i>F</i> -ratio			6.975***	
<i>4. Interactions</i>				
Coach similarity to client $\times$ client coaching readiness			0.144*	0.069
Client similarity to coach $\times$ client trust in coach			-0.059	0.152
Change in $R^2$	0.019		0.021	
Adjusted $R^2$	0.152		0.202	
Change in <i>F</i> -ratio	4.364*		2.61†	
Full equation <i>F</i> -ratio	5.377***		5.929***	
<b>Note(s):</b>				
a. <sup>1</sup> Captured at T0 (Time 0, initial survey)				
b. <sup>2</sup> Captured at T1 (Time 1, midterm survey approximately six months into the relationship)				
c. <sup>3</sup> Captured at T2 (Time 2, final survey at end of one-year contract)				
b. Sex is coded as 1 = male, 2 = female; client tenure in role and coach relationship with client are reported in months				
c. † < 0.10, * $p < 0.05$ , ** $p < 0.01$ , *** $p < 0.001$ . Reporting two-tailed tests of significance and standardized regression coefficients				
<b>Source(s):</b> Designed by authors				

**Table 2.**  
Regression results  
predicting personal  
learning

Coaches' perceptions of client readiness for coaching were significantly related to both personal learning ( $\beta = 0.23$ ,  $p < 0.001$ ) and effectiveness improvement ( $\beta = 0.18$ ,  $p < 0.01$ ); these findings offer support for [Hypotheses 1a](#) and [1b](#). [Hypotheses 2a](#) and [2b](#) were also supported, as client trust of coach significantly predicted both outcome variables (personal learning  $\beta = 0.28$ ,  $p < 0.001$ ; effectiveness improvement  $\beta = 0.18$ ,  $p < 0.01$ ).

[Hypotheses 3a](#) and [3b](#) predict mediation through which personal learning mediates the relationships between (1) client coaching readiness and effectiveness improvement, and (2) client trust in coach and effectiveness improvement. As displayed in [Table 3](#), when personal learning is entered into the regression equation, the direct effects of both client coaching readiness and client trust in coach reduce to non-significant levels. Further, we tested the indirect effects of coaching readiness and trust on effectiveness using [Hayes' \(2013\)](#)

Predictors ( <i>N</i> = 196)	Effectiveness improvement <sup>3</sup> Model 1		Effectiveness improvement <sup>3</sup> Model 2		Executive coaching process
	$\beta$	SE	$\beta$	SE	
	<b>1. Control variables<sup>b</sup></b>				
Initial effectiveness <sup>a,1</sup>	0.447***	0.070	0.338***	0.061	
Sex <sup>1</sup>	0.135	0.091	0.085	0.077	
Education <sup>1</sup>	-0.087	0.059	-0.016	0.051	
Tenure in current role <sup>1</sup>	-0.005	0.001	0.015	0.000	
Coach prior experience with client <sup>1</sup>	0.001	0.005	-0.005	0.004	
<i>Change in R<sup>2</sup></i>	0.241				
<i>Adjusted R<sup>2</sup></i>	0.221				
<i>Change in F-ratio</i>	11.866***				
<b>2. Main effects</b>					
Client coaching readiness <sup>2</sup>	0.179**	0.070	0.060	0.063	
Client trust of coach <sup>2</sup>	0.176**	0.111	0.010	0.017	
<i>Change in R<sup>2</sup></i>	0.067				
<i>Adjusted R<sup>2</sup></i>	0.282				
<i>Change in F-ratio</i>	8.991***				
<b>3. Mediator</b>					
Personal learning <sup>2</sup>			0.422***	0.078	
<i>Change in R<sup>2</sup></i>			0.164		
<i>Adjusted R<sup>2</sup></i>			0.449		
<i>Change in F-ratio</i>			57.042***		
<b>4. Moderator</b>					
Client similarity to coach			0.112†	0.068	
<i>Change in R<sup>2</sup></i>			0.008		
<i>Adjusted R<sup>2</sup></i>			0.454		
<i>Change in F-ratio</i>			2.833†		
<b>5. Interaction</b>					
Personal learning × Client similarity to coach			-0.104*	0.109	
<i>Change in R<sup>2</sup></i>			0.011		
<i>Adjusted R<sup>2</sup></i>			0.462		
<i>Change in F-ratio</i>			3.755*		
<i>Full equation F-ratio</i>	11.769***		17.515***		
<b>Note(s):</b>					
a. <sup>1</sup> Captured at T0 (Time 0, initial survey)					
b. <sup>2</sup> Captured at T1 (Time 1, midterm survey approximately six months into the relationship)					
c. <sup>3</sup> Captured at T2 (Time 2, final survey at end of one-year contract)					
b. Sex is coded as 1 = male, 2 = female; client tenure in role and coach relationship with client are reported in months					
c. † < 0.10, * < 0.05, ** < 0.01, *** < 0.001. Reporting standardized regression coefficients					
<b>Source(s):</b> Designed by authors					

**Table 3.**  
Regression results predicting improvement in workplace effectiveness

bootstrapping method through the macro PROCESS for SPSS. A test of the indirect effect of coaching readiness on improved effectiveness via the mediating influence of personal learning revealed a lower 95% confidence interval of 0.051 and an upper 95% confidence interval of 0.230. The confidence intervals exclude zero, and the indirect effect is significant at the  $p < 0.05$  level. Similarly, a test of the indirect effect of trust on effectiveness improvement via the mediating influence of personal learning revealed a lower 95% confidence interval of 0.118 and an upper 95% confidence interval of 0.402. Together, these results suggest fully-

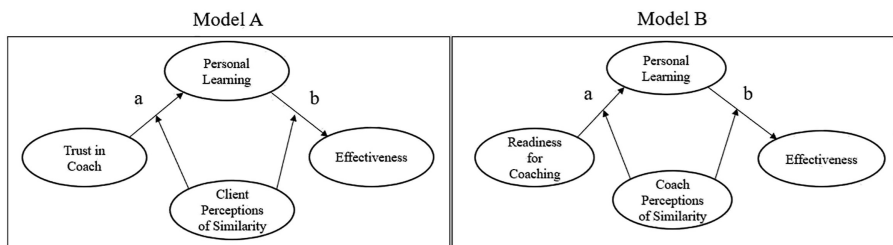
mediated paths with significant indirect relationships, thereby providing support for both [Hypotheses 3a](#) and [3b](#).

As a robustness check, we re-ran the above analyses in R as multilevel models using the R package “multilevel” to account for coach-level effects. The results did not change when accounting for coach-level effects, and the random intercept models did not significantly differ from the fixed intercept models. Results remained unchanged when accounting for the nested nature of the data, indicating strong support for [Hypotheses 1](#) through 3.

To answer the research question regarding the role of perceived similarity as a moderator of the aforementioned relationships, we created a series of three interaction terms whereby (1) coach perception of similarity interacts with coach reports of client readiness for coaching; (2) client perception of similarity interacts with client trust in coach; and (3) client perceptions of similarity interacts with client reports of personal learning. We matched the report of perceived similarity with the same-source report of the independent variable (client-to-client and coach-to-coach) as it is that respondent’s perceived degree of similarity with their partner that affects whether the mechanism of similarity-attraction may be influencing attitudes and behaviors. Research on relational demography in mentoring relationships has shown that perceived similarity is a greater predictor of relationship outcomes than actual similarity ([Ensher et al., 2002](#); [Lankau et al., 2005](#)).

Regression results reveal an interesting dynamic when it comes to perceived similarity as a moderator. An initial take would appear to suggest contradictory findings with regard to coach perceptions of similarity and client perceptions of similarity. As outlined in [Table 2](#), coach perceptions of similarity positively moderates the relationship between client coaching readiness and personal learning ( $\beta = 0.14, p < 0.05$ ), suggesting that the relationship between client readiness and client personal learning is stronger when the coach perceives high similarity with the client. [Table 2](#) further reveals that client perceptions of similarity does not appear to moderate the relationship between client trust in the coach and client personal learning. But, as demonstrated in [Table 3](#), client perceptions of similarity appears to *negatively* moderate the relationship between client personal learning and client improved effectiveness perceptions ( $\beta = -0.10, p < 0.05$ ); taken at face value, this suggests that the relationship between client learning and effectiveness improvement *weakens* when the client perceives higher similarity with the coach. These contradictory findings regarding the role of perceived similarity in the coaching context, underscore the complexity of the dynamics at play, prompting us to pursue a more nuanced analysis of the interaction effects to unravel the underlying mechanisms and their implications [\[2\]](#).

To further understand the role of perceived similarity, we employed [Hayes’ \(2013\)](#) PROCESS macro for SPSS to test two conceptual models (see Models A and B in [Figure 1](#)). Using Hayes’ Model 59 [\[3\]](#) of *moderated mediation* and including T1 effectiveness, client sex, and coach sex as covariates, we obtain interaction coefficient estimates and produce bootstrap confidence intervals. In Model A, we replicate the mediating role of personal



**Figure 1.**  
Conceptual models

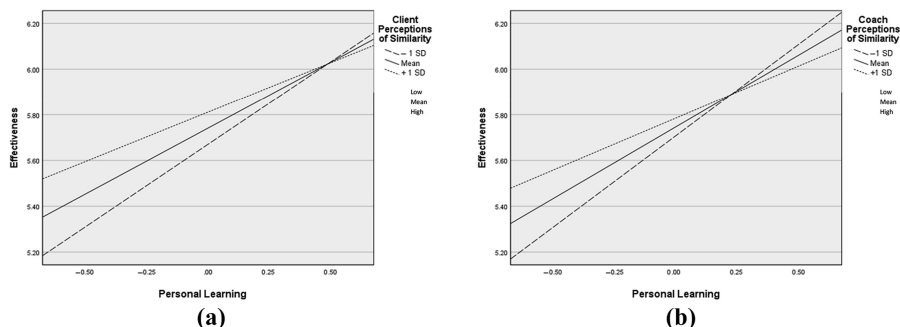
**Source(s):** Designed by authors

learning between trust in coach and effectiveness improvement. Then we test client's perceptions of similarity as a moderator for the *a* path (trust to learning) and *b* path (learning to effectiveness). While client-perceived similarity did not moderate the relationship between trust in coach and personal learning (CI =  $-0.054$  to  $1.83$ ;  $p = 0.284$ ), the moderation of the relationship between learning and perceived effectiveness is significant-adjacent (CI  $-0.466$  to  $0.001$ ;  $p = 0.051$ ). As demonstrated in Figure 2(a), at high levels of personal learning, client perceptions of similarity do not appear to impact client effectiveness; however, when learning was low, client perceived similarity has a substantial influence, such that higher perceived similarity results in greater effectiveness improvement.

For Model B, we replicate the mediating role of personal learning between client readiness and perceived effectiveness. We then test the role of coach-perceived similarity as a moderator of the relationship between client readiness and learning, finding that this interaction was not significant (CI =  $-0.027$  to  $0.253$ ;  $p = 0.114$ ). With that said, coach perceptions of similarity significantly moderates the relationship between learning and effectiveness (CI =  $-0.379$  to  $-0.054$ ;  $p = 0.009$ ), such that at low levels of learning higher coach perceptions of similarity result in higher effectiveness, but the benefits of similarity wane at higher levels of learning. As demonstrated in Figure 2(b), the most effective clients are those who have obtained the greatest learning while simultaneously are regarded by their coaches as the most dissimilar from the coach.

## Discussion

Coaching programs are popular because they work. Recent meta-analyses offer convincing evidence of coaching effectiveness on important workplace outcomes, including skill-based (learning) and results-oriented (effectiveness) outcomes (i.e. Burt and Talati, 2017; de Haan and Nilsson, 2023; Jones *et al.*, 2016). Flexible delivery of coaching will continue to provide developmental support to employees in disruptive environments (Fleisher *et al.*, 2020), especially distance coaching and other innovative coaching practices that address uncertainties and complexities that develop when norms are disrupted (Cavanagh and



**Note(s):** The left plot depicts the interaction between client perceptions of similarity, personal learning, and effectiveness depicted in Model A. The right plot depicts the interaction between coach perceptions of similarity, client personal learning, and client effectiveness depicted in Model B. In both models, initial effectiveness, coach sex, and client sex were included as covariates, and the variables personal learning and similarity perceptions have been mean centered

**Source(s):** Designed by authors

**Figure 2.** Interaction plots for the influence of client-rated similarity to coach and coach-rated similarity to client on the relationship between personal learning and effectiveness improvement



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Lane, 2012). As executive coaching continues to grow exponentially (Nübold, 2021), we hope to contribute to the reinvigoration of rigorous research in the field through our longitudinal, dyadic design of matched coach-client pairs.

This study adds to coaching literature in several ways. First, although expectancy theory and mentoring theories suggest that training efforts predict positive training outcomes, coaching research has lagged behind in validating whether these concepts hold within this unique form of developmental relationship, especially with reference to the relationship between coachee motivational characteristics and coaching outcomes. Further, the formative process of coaching relationships has received little attention. By examining perspectives of both client and coach, we provide insights about the processes involved in a coaching experience that inform contemporary and future coaching efforts. The multilevel results in our study provide confidence that the relational mechanisms observed are truly a function of the unique relationships between coaches and each individual client. Lastly, we integrate theory from multiple domains to test both the direct effects of client readiness for coaching and client trust in coach on learning and effectiveness outcomes and the moderating effects of perceived similarity on these relationships.

Results indicate that coach assessment of clients' readiness for coaching and clients' degree of trust in their coach positively affect the extent of personal learning achieved by the client at the end of the coaching contract. Client's active engagement through readiness for coaching epitomizes the client's commitment to the coaching process, and is considered essential for effective coaching to take place (Shaw and Linnecar, 2007). One practical implication involves organizations evaluating candidates' readiness for coaching before assignment, as lack of readiness could result in an unproductive relationship without positive change in client learning or effectiveness.

Additionally, client trust in their executive coach significantly predicts personal learning in distance coaching relationships. Markovic *et al.* (2014) provide specific recommendations for behaviors executive coaches can practice to foster trust with their clients. Future research on executive coaching would benefit from greater integration of trust-building behaviors to examine variables that serve as antecedents to the development of trust. It may be the case that certain client characteristics, such as previous history in developmental relationships or personality, limit or strengthen ability to trust a coach, regardless of coach capabilities.

Results demonstrate the importance of personal learning as a mediating mechanism by which client trust and readiness for coaching affect the extent of improvement in work effectiveness. Clients must feel that they are expanding their skill set and developing new perspectives toward opportunities and challenges in their organization to improve effectiveness. Future research should consider variables from the transfer of training literature, such as supervisor support and safety climate, that may affect the application of learning from executive coaching to the workplace. Individuals will likely experience some degree of change in attitudes or behaviors owing to participation in an executive coaching process, but will experience frustration if their work environment does not support those new attitudes and behaviors.

Client perceptions of similarity had no effect on the relationship between client trust and client personal learning. As executive coaches are external to the organization and the relationship is formally structured and a paid service, when it comes to trusting a coach, clients may pay less attention to similarity and rather focus on the coach's credentials and competence.

Of particular interest, however, is our study's exploration of how perceived similarity between coach and client in distance coaching affects the relationships between client characteristics, personal learning, and improved work effectiveness. Results in our initial moderator analysis show preliminary support that both similarity and dissimilarity between coach and client matter in the developmental process, such that it initially appears as though

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a coach's similarity to client strengthens the relationship between client's readiness for coaching and the extent of personal learning reported by the client. Perhaps perceived similarity contributes to coach willingness to challenge the client or provide more candid feedback so that the client learns more from coaching. This would be important for coaches to keep in mind as they may not realize that their perceptions of dissimilarity to their client may affect their coaching behaviors.

The more nuanced findings of our PROCESS results, however, tell a slightly different story. These results indicate that, rather than simply demonstrating the apparent helpfulness of dissimilarity, we can now see *when* similarity matters in the relationship between client personal learning and improvements to their effectiveness. The strongest evidence we found for the influence of similarity perceptions is how it can moderate the translation of learning into eventual effectiveness. At lower levels of learning, clients who perceive higher levels of similarity with their coach see greater benefits in terms of effectiveness. For coaches, when clients exhibit lower levels of learning, high perceived similarity results in greater effectiveness. This relationship changes, however, as at the highest levels of personal learning, clients whom coaches perceive as *dissimilar* from them see the strongest results in workplace effectiveness. As we will describe in further detail momentarily, this finding indicates that a degree of diversity may help clients find innovative or different ways to put learning into action. These preliminary results warrant research to better understand the role of similarity and dissimilarity in distance and F2F coaching relationships.

The nuanced findings regarding the differential relationships of perceived similarity and dissimilarity on learning and effectiveness outcomes is of particular interest. While similarity may strengthen the relationship between readiness for coaching and personal learning, coach perceptions of *dissimilarity* help translate personal learning into improved effectiveness, especially for clients with high levels of personal learning. This suggests that a balance of similarity for relationship building and dissimilarity for perspective expansion can be beneficial in coaching relationships, and that similarity or dissimilarity may be most important to emphasize at different stages of the coaching relationship.

A recommendation that follows these findings would be for organizations to focus on how diverse coaching styles that draw uniquely on both similarities and dissimilarities can produce effective coaching outcomes. This highlights the value of varied coaching styles and approaches in different coaching contexts, and encourages a more highly tailored approach to workplace coaching relationships, whether distance coaching or face-to-face. Doing so, however, requires providing opportunities for coaches and coachees to understand the ways in which they are similar and distinct before the coaching begins. Particularly as external coaches are not supervised in the same way as organizational employees, this drives home the importance of *pre-coaching*, in particular assessing similarity along with readiness and ensuring that the stage is set to build trust as prerequisites for coaching effectiveness.

#### *Limitations and future research*

Despite its strengths, this study is not without limitations. First, though distance coaching grew in popularity even prior to the worldwide Covid-19 pandemic due largely to industry perceptions that it offers a cost-effective way to increase productivity and knowledge (Ghods and Boyce, 2013), our exclusive focus on distance coaching relationships constrains the degree to which results may generalize to the broader coaching population. It is possible that the richness of communication in F2F coaching relationship may alter the ways in which trust develops, similarity is perceived, and how these influence the coaching process and outcomes. Further, clients had the option to meet through their choice of telephone or videoconference for each coaching session. Future research should examine several forms of communication media to determine whether the relationships found herein remain similar under different

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conditions, accounting for modern advances in various communication technologies (Sivunen *et al.*, 2023).

Although this study benefits from a longitudinal design with surveys completed by both coaches and clients, it remains constrained in that the outcome variables – personal learning and effectiveness – were self-reported by clients. While coaching literature acknowledges that learning and effectiveness outcomes are not suitably addressed by coaches (Bozer and Jones, 2018), future research incorporating a triangulation of matched data between coach, client, and the client's supervisor could provide more robust and objective data. In addition, several of the measurement instruments were adapted for use in the present study, and, though they all fell well within acceptable standards for reliability and loaded onto the appropriate factors, these measures would benefit from being validated in the future.

Our results suggest that coach and client perceptions of similarity can boost client effectiveness when personal learning is low, but we caution against then matching coach-client pairs who are very similar to each other. On the contrary, we suspect that clients who are similar to their coaches may have exaggerated perceptions of their own effectiveness, especially when personal learning is low. It is possible that psychological factors such as identification with the coach or confirmation bias lead clients who perceive themselves as similar to their coaches to have inflated perceptions of their own effectiveness after coaching. Interestingly, coach perceptions of dissimilarity became beneficial for the effectiveness of clients at high levels of personal learning. This suggests that coach-client diversity may actually present an advantage for clients with high learning, as true differences between the coach and client present opportunities for the client to identify and enact novel strategies to increase effectiveness. Future research should investigate similarity perceptions and demographic similarity in combination with more objective performance measures to better understand the influence of similarity in the coaching process.

While our findings suggest that relational elements of a coaching relationship play an important role in coachee personal learning and perceived improvements in work effectiveness, recent meta-analytic results suggest that coaching may have an even greater impact on performance rated objectively or rated by others (for example through 360-degree feedback; Wang *et al.*, 2021). Thus, future research on distance coaching should include objective and peer-rated measures of performance. This study highlights personal learning broadly, but future research should examine how distance coaching can help develop specific skills needed in the New World of Work (NWoW) (O'Neill *et al.*, 2023).

Another avenue for future research involves organizational considerations. One question is whether distance coaching relationships are susceptible to organizational influence on the *working alliance* (Kruger and Terblanche, 2022) between remote coaches and coachees in the same way that experienced in F2F relationships. Another question involves the influence that remote coaching programs have on organization-level outcomes, as companies investing in such highly personalized development will be interested in measuring their return on investment. Addressing organization-level influence and outcomes could expand coaching research into the fourth dimension of Kirkpatrick's (1996) framework by determining the degree to which longer-term organizational results are realized; the assumption here being that client learning and behavioral changes result in improvements to productivity and achievement of organizational objectives.

## Conclusion

Higher client motivational levels toward the coaching process are expected to “hopefully lead to more successful learning and development and worker performance” (Ladyshewsky, 2010, p. 303), and improved workplace effectiveness is generally understood as a primary goal of coaching (Grant, 2013). We pave the way in understanding the relationship between client

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readiness, trust, learning and effectiveness. By directly testing these relationships in the context of distance coaching, we provide an initial framework through which we can begin to address some of the more nuanced questions regarding relational factors that play a role in enhancing the influence of coaching in improving client effectiveness. With this study, we are one step closer to learning how to best leverage motivation, trust, and perceptions of similarity in the world of distance coaching relationships.

## Notes

1. As a robustness check, we also controlled for the potential nonlinear effect of T1 effectiveness through a polynomial hierarchical multiple regression. The quadratic coefficient was nonsignificant and results remained unchanged, leading us to present the linear hierarchical multiple regression.
2. We thank an anonymous reviewer for the helpful suggestion to further investigate the moderation results.
3. While we did not expect perceptions of similarity to moderate the direct effect ( $c'$ ), we employed PROCESS Model 59 over Model 58 to avoid a potentially severe bias in the parameter estimates that would have emerged in the event that moderation was present and we failed to account for it.

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