# Executive Coach 1.0 Training Guide

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Life Coach 1.0 Training Guide


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# Introduction to Executive Coaching

### *Welcome to your coach training program!*

*This introduction starts at the heart of coaching, with a look at coaching's core elements: the 3 Trusts, 7 Essential Coaching Qualities, and 7 Classic Elements of a Coaching Session. The next sections—Levels of Listening and Structured Improvisation—point to the most important skill a coach employs: empathetic, active listening.*

### *Essential Coach Qualities Covered*

*All 7*

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# Executive Coaching

Executive coaching emerged for leaders to have a method for making better decisions and using resources more effectively. Competition reigns in the business world, between organizations and within them. A premium is placed on performance. Soon after its introduction in the mid-1990s, executive coaching spread with incredible speed.[1] Once people in business realized the immense return on investment of working with a coach, coaching became a way for leaders to leverage increased mindfulness in decision making, the power of a vibrant working culture, and the benefit of improved professional and personal relationships.[2] Simply put: people who worked with coaches performed better. And in the hyper-competitive world of business, people will look to leverage any edge possible. Executive coaching continues to offer that edge to leaders and organizations.

## Coaching for Leadership, Performance, and Communication

People come to executive coaching for a number of reasons. The most common are to develop leaders and build strengths, though additional motivations include correcting an issue or resolving conflict. In a survey conducted in 2002, executives gave the following reasons for hiring an executive coach:[3]

- To develop the leadership skills of high-potential individuals (86%).
- To improve the odds that newly-promoted managers would be successful (64%).
- To develop management and leadership skills among their technical people (59%).
- To correct behavioral problems at the management level (70%).
- To help leaders resolve interpersonal conflicts among employees (59%).

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[1] Brock, Vikki G. (2014) *Sourcebook of Coaching History*, 2nd Ed.

[2] Whitworth, Laura. 1998. *Co-Active Coaching*. Davies-Black Publishing.

[3] Wise, Pamela & Voss, Laurie. (2002) The Case for Executive Coaching. Research Report from the Lore Research Center. & Diane E. Lewis, "Companies are hiring coaches to teach executives how to sharpen management skills and communicate effectively." 3 May 2002.

From a life coaching perspective, leadership is articulating a vision and working with others to achieve it while engaging in personal and professional growth. Executive coaching includes a focus on leadership development through exploring various tools and exercises that increase emotional intelligence and leverage strengths.[4] Similar themes show up in books about leadership, such as Marshall Goldsmith's *What Got You Here Won't Get You There*[5] and Stephen Covey's *The 7 Habits of Highly Effective People.*[6] Many exercises in this 1.0 Training Guide look at elements of leadership, from creating an inspiring vision to developing systems to ensure a vibrant company culture. This book also covers aspects of effective communication and conflict resolution. The Arbinger Institute's *Leadership and Self-Deception*[7] and *The Anatomy of Peace*[8] offer a blueprint and guidelines for growth by working through conflicts and building strong relationships. Elements of this work show up in later chapters (such as *Assumptions* and *Powerful Relationships*).

Strengths-based coaching relies on the idea that people perform at optimal levels when they cultivate and employ strengths rather than constantly managing and mitigating weaknesses. Such thinking goes against the cultural conditioning in traditional education, which measures performance by ensuring that the weakest areas still pass a standard, rather than focusing on excelling in a single area. For example, let's say a student earned all A's, even surpassed the teacher's understanding in every subject except one, where they earned a failing score. With such a report card, the student would not pass the grade and would be forced to focus on the failing subject to get to the next level. Such thinking encourages people to avoid taking risks, and they may also avoid putting too much time into the pursuit of being excellent in only one or two areas. However, in the business world, being excellent in a few select areas, and working to become even better, is a recipe for success. The business world rewards specialization. Strengths-based coaching helps leaders understand their own strengths and places people in positions that naturally play to their strengths.[9]

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[4] Kim, Hyejin & Kim, Taesung. (2017). Emotional Intelligence and Transformational Leadership: A Review of Empirical Studies. Human Resource Development Review. 16.

[5] Goldsmith, M., & Reiter, M. 2007. *What got you here won't get you there: How successful people become even more successful.* New York: Hyperion.

[6] Covey, Stephen R. 2004. *The 7 Habits of Highly Effective People: Restoring the Character Ethic.* New York: Free Press.

[7] Arbinger Institute. 2000. *Leadership and Self-Deception: Getting Out of the Box.* San Francisco: Berrett-Koehler.

[8] Arbinger Institute. 2015. *The Anatomy of Peace: Resolving the Heart of Conflict.* San Francisco: Berrett-Koehler.

[9] Rath, Tom. 2008. *Strengths Based Leadership.* Gallup Press: New York, NY.

# Based in Core Coaching Concepts and Theory

Executive coaching finds its roots in sports psychology, the mentorship movement, and leadership development programs that became popular in the twentieth century.[10] Theory from positive psychology also supports the value and efficacy of coaching. The following chapters explore ideas such as Hope Theory, Flow, and Broaden & Build Theory, to name a few.[11]

The Essential Coach Qualities form the foundation of executive coaching. These are the qualities that a certified life coach demonstrates in every coaching session to ensure that they are working with a client from an empowerment basis. These qualities align with core competencies, a series of action steps and checkpoints designed by highly regarded coaching organizations. These organizations have created standards for coaching that form the backbone of the coaching profession. This next section explores the elements of life coaching and continues with core life coaching tools.

Welcome to your executive coach training journey!

[10] Gallwey, W T. *The Inner Game of Tennis.* Toronto: Bantam Books, 1979.

[11] Fredrickson, Barbara & Losada, Marcial. (2005). The Positive Affect and the Complex Dynamics of Human Flourishing. The American psychologist. 60. 678-86.

# Life Coaching

Life coaching is a professional relationship between a client and a coach designed to help the client increase self-awareness, generate learning, and identify and accomplish meaningful goals. Over the past thirty years, the life coaching profession has flourished. With the radical changes ushered in by the Information Revolution, life coaching developed to meet the need of people to live lives with more intention, clarify goals amid a sea of options, and make more effective decisions on how to spend time, energy, and resources. Based in humanistic psychology and drawing from many different sub-disciplines ranging from leadership development to sports psychology, life coaching and its core ideas have become increasingly supported by positive psychology studies and theory.[12] Coach Training EDU's model of life coaching is based on Hope Theory: the study of how intentionally addressing both agency and pathways can make a measurable difference in performance.[13] We will review this concept in more detail in the next chapter. As the science and practice of coaching continue to develop, coaching concepts are weaving themselves more and more into the fabric of our society and influencing the way we approach learning, work, health, and well-being.

Life Coaching is so effective because it puts the client at the center of the process and trusts in the client's brilliance to overcome challenges. However, there are other professions that sometimes get confused with coaching, and it's important to be able to distinguish coaching from these professions.

- **Consulting vs. Coaching:** A coach does not advise or offer solutions for the client.
- **Therapy vs. Coaching:** A coach does not focus on the past or offer any kind of diagnosis.
- **Mentoring vs. Coaching:** A coach does not necessarily need to be skilled in a particular area to coach someone working in that area.

On a pragmatic level, coaching helps clients recognize and identify their capabilities, craft action steps to achieve goals, and design ways to stay accountable and resilient in the face of setbacks. On a deeper level, working with a coach or going through a coach training program transforms you as you mindfully explore your own ingrained assumptions, limiting beliefs, and ideas of

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[12] Brock, Vikki. 2014. Sourcebook of Coaching History, 2nd ed.

[13] Snyder, et al. 2002. Hope and Academic Success in College. Journal of Educational Psychology 94(4): pp. 820-826.

identity. Research finds that the most effective coaches are as dedicated to their own self-understanding and development as they are to their clients'.[14]

Central to the practice of coaching is relying on the three coaching trusts: trust the client, trust yourself, and trust the process. Next, we will examine these three trusts and the related seven essential coach qualities of an effective life coach. We will then have a chance to look at some of the reasons why coaching is effective before outlining each of the seven elements of a coaching session. As you continue to explore the profession, you are invited to lean into curiosity: try out the concepts in your work with others, as well as in your own life.

# What

## The Three Trusts

1. **Trust Your Client.**

   Trusting your client means being empathetic: listening to such a degree that you imagine you *are* the client. You have to trust that the client has all the inner and outer resources at hand to overcome whatever challenge they are facing. From this stance, you empower your client to set the coaching session agenda, guide the direction of the session, and design action steps.

2. **Trust Yourself.**

   Trusting yourself points to the power of your own curiosity when you actively and empathetically listen. As you listen, you will sense glimpses of certain ideas and emotions. Your job as a coach is to trust your natural curiosity. When you ask yourself what you are genuinely most curious about and trust in your intuition, you will find yourself asking questions that raise your client's awareness in powerful ways. Your job then is to have the courage to ask uncomfortable questions and speak to the hard areas when you think it will be the most useful to your client.

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14 Welch, et al. 2014. Strengths-Based Leadership Development: Insights from Expert Coaches. Consulting Psychology Journal: Practice and Research 66(1): pp. 20 — 37.

3. **Trust the Process.**

   Trusting the process allows you to develop a strong sense of confidence and safety in the energy of your coaching sessions. You are comfortable with your client's emotion and even actively go deeper into the feelings, looking to draw out meaningful insights. Trusting the process allows you to coach the client, not the problem, and enables you to expect that the power of insight will provide clarity on what action steps your client needs to take. Action steps that arise from increased awareness and are well-designed to achieve certain outcomes are exciting. A coach inspires a client's effective action by trusting the process and crafting all the useful work of a coaching session into meaningful action between coaching sessions.

## The 7 Essential Coach Qualities

A coach must display each of these competencies at all times during a coaching session, from setting the coaching session agenda at the beginning of a coaching session to designing action steps toward the end. The 7 Essential Coach Qualities are briefly described below, including example scoring questions for each that an evaluator might use to assess a coach's skill. Chapter Seven in this text further explores each of these qualities in more detail.

1. **Professional.**

   A coach sets ethical coaching agreements with clarity and cultural awareness. The central aspects of this competency are establishing clear expectations between the coach, client, and sponsor (if present), maintaining confidentiality, designing an alliance, and addressing accountability.

   ***Skill-Check Questions:***

   *"How well did the coach clarify expected outcomes or address accountability on a client's recent action steps?"*

   *"How well did the coach use the T.I.M.E. model when setting a strategic or session agenda?"*

2. **Empathetic.**

   A coach actively listens empathetically, using imagination and intuition while staying curious and attuned with a client to pick up on even subtle shifts in a client's emotion.

An effective life coach asks questions designed to provoke insight rather than gather information for the coach's sake.

***Skill-Check Questions:***

*"How well did the questions provoke new insights for the client, as opposed to seeking information or implying solutions?"*

*"To what degree did the coach recognize subtle shifts in a client's energy, tone, or perspectives?"*

## 3. Empowering.

A coach sees the client as the expert on their own life, inviting the client to be proactive in crafting both the coaching session agenda and eventual action steps. In this sense, a coach is a guide who empowers the client's own leadership. A coach offers expert knowledge with curiosity to empower the client and adapts coaching tools to fit the client's unique situation.

***Skill-Check Questions:***

*"How well did the coach focus on the client, not the problem?"*

*"How well did the coach balance expert knowledge and information with empowering the client?"*

*"How well did the coach adapt the client's language and adjust standard coaching questions and tools to fit the client?"*

## 4. Curious.

An effective coach remains curious, even when clients experience strong emotion or realize epiphanies. A skilled coach keeps an open mind and asks questions that lead to new insights, exploring a deeper agenda when looking at the session topic. A coach uses powerful questions that are short and open-ended (usually starting with *What, Why,* or *How*), and the coach invites the client to do most of the work of uncovering insights in a coaching session.

***Skill-Check Questions:***

*"How well did the coach ask short, open-ended questions using a balance of Learn-Be-Do questions that addressed a client's agency and pathways?"*

*"To what degree was the coach willing to lean into intuition while staying curious and holding space for the client to explore?"*

## 5. Courageous.

A coach's job is to create a safe space. They demonstrate connection and vulnerability, without compromising direct and sometimes uncomfortable questions. Effective coaches model courage during coaching sessions to set the stage for their clients to do the same.

***Skill-Check Questions:***

*"How well did the coach address prickly points, ideas, or observations? (Either directly or through sharp questions.)"*

*"To what degree is the coach willing to take risks and share intuition and ideas without attachment to being right?"*

## 6. Confident.

A coach is confident in the client, inviting the client to do much of the work of exploring ideas and emotion in a coaching session. A coach trusts the coaching process and embraces pausing and silence while holding space for the client to arrive at useful action steps. Strong coaches show confidence that their client can build appropriate accountability.

***Skill-Check Questions:***

*"How well does the coach demonstrate trust in the coaching process and comfort with pausing and silence during a coaching session?"*

*"To what degree does the coach trust that the action step will come from the client if sufficient learning and insight happens?"*

7. **Inspiring.**

   An effective coach helps clients discover inspiration within themselves and use it to power their journey of self-development. A coach inspires clients to take bold actions between coaching sessions while balancing learning with action steps. This is accomplished by designing ways to help clients stay accountable and follow through on action steps.

   ***Skill-Check Questions:***

   *"How effective was the coach at helping the client develop inspiring Well-Designed Actions?"*

   *"To what degree does the action (pathways) also include aspects of Learning and Being (agency)?"*

# Why

Everyone loves a good listener, especially if that listener keeps the attention on you and keeps asking outstanding questions. So, it makes sense that people love working with life coaches, people who are literally trained (and hopefully certified) to be professional listeners. As a participant in a life coach training program, it's important for you to experience first-hand the benefits of coaching to get an idea of what truly provides value from the client's perspective. People gain tremendous value from simply processing ideas and emotions out loud, and working with a coach is a great excuse for a fresh start.[15] Having someone help you determine what's most important in your life, design action steps, and hold you accountable is going to have a positive impact on your life. And when that person is trained, operates within a theoretical framework grounded in positive psychology, is skilled in the essential coach qualities, and has a toolbox of effective exercises, the client's coaching experience becomes that much more impactful. The following section examines a few of the major theoretical pillars that form the foundation of life coaching to give a sense of why the profession is so effective.

### A. Trust in the client on the journey of personal and professional growth.

The pursuit of knowledge and understanding of the highest aims of a human being have captured the attention of people for centuries. Humanistic studies can be traced back to Socrates and other ancient philosophers. While the Renaissance led to a revival of many

[15] Grant, A. M. 2003. The impact of life coaching on goal attainment, metacognition, and mental health. Social Behavior and Personality 31(3): pp. 253-263.

ancient ideas, such as exploring the human experience and potential, the field of humanistic psychology arose in the 1950s in response to psychoanalysis and behaviorism. Humanistic philosophy and psychology posit that everyone inherently wants to do well and that a holistic approach is the best way to address challenges.[16]

One of the most recognized concepts in humanistic psychology is Maslow's Hierarchy of Needs. In *Motivation and Personality* (1954), Abraham Maslow theorized that at our core, each of us strives for self-realization, or the full realization of our potential to be human. Maslow's Hierarchy of Needs points to the importance of having foundational resources in place to experience higher levels of well-being.[17] He also emphasized the usefulness in shifting focus away from pathology to looking at beneficial traits of being healthy.

C.R. Snyder introduced the concept of Hope Theory in the mid-1990s.[18] Hope, he proposed, is the product of strong agency and the ability to develop and follow pathways to achieve goals. Agency is looking at what you believe about your capabilities surrounding goal creation. Based on your past, do you think you can accomplish what you are going to accomplish? Or, based on *what you think you can learn*, do you think you can accomplish what you want to accomplish? Pathways are the steps/links between actions and results. They're the strategies you design to execute a plan toward achieving a goal. Practical research using Hope Theory in athletes, academics, and other fields has demonstrated that hope is measurable, and—even more importantly—you can actively grow it to increase your capabilities surrounding goal achievement.

In *Emotional Intelligence*, Daniel Goleman outlines five important skills for managing one's own emotions and establishing healthy, strong relationships.[19] Such emotional skills balance the rational stream of thought and can be better indicators of success than tests designed to measure logic or knowledge acquisition. Goleman's work underlines the importance of the inner work of self-understanding, as well as developing stamina and skill to be more empathetic.

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[16] Maslow, A. H. 1954. *Motivation and Personality*. Addison Wesley Longman, Inc.

[17] Ibid.

[18] Snyder, C.R. 1995. Conceptualizing, Measuring, and Nurturing Hope. Journal of Counseling and Development 73(3): pp. 355 - 360.

[19] Goleman, D. 2005. *Emotional Intelligence*. Bantam.

## B. Increased awareness of executive functioning provides a structure to explore elements of human flourishing.

In 1989, Carol Ryff advanced well-being theory and put it into practice, marking it as landmark work in positive psychology research and kicking off decades of positive psychology research. Ryan and Deci (2001)[20] cite Ryff (1989)[21] as foundational in the field of eudaimonic well-being research, as opposed to hedonic well-being research. Hedonic-focused research is measured by pain avoidance and pleasure attainment, whereas eudaimonic well-being research emphasizes meaning and fulfillment. Her work marked a shift in approach from the hedonic pursuit as a proxy for happiness to a more holistic model of eudaimonic well-being. The eudaimonic well-being research that Ryff kick-started uses self-realization, fulfillment, and meaning to understand optimal human functioning. The Greek term "eudaimonia" is defined as "the feelings accompanying behavior in the direction of, and consistent with, one's true potential."[22] In *Flourish,* psychologist Martin Seligman identified five elements of well-being and arranged them in the handy acronym PERMA: Positive emotion, Engagement, Relationships, Meaning, and Achievement.[23] Each element in PERMA is desirable, pursued for its own intrinsic value, and can be measured individually. The PERMA model posits that when all elements are sufficiently present, well-being or flourishing occurs.

## C. Clients tap into the benefits of positive emotion and scheduling time to experience flow.

Barbara Fredrickson, in her book *Positivity*, outlines the benefits of tapping into positive emotion as a way to broaden one's agency while building more capability to meet increasingly difficult challenges.[24] Coaching helps clients design ways to stay engaged in meaningful work and more mindfully experience an increasing skill set.

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[20] Ryan, R. M. and E. L. Deci. 2001. On Happiness and Human Potentials: A Review of Research on Hedonic and Eudaimonic Well-Being. Annual Review of Psychology 52: pp. 141-66.

[21] Ryff, C.D. 1989. Happiness is Everything, or Is It? Explorations on the Meaning of Psychological Well-Being. Journal of Personality and Social Psychology 57(6): pp. 1069 - 1081.

[22] Waterman, A. S. 1984. *The Psychology of Individualism*. New York: Praeger.

[23] Seligman, M. 2011. *Flourish*. Free Press, A Division of Simon & Schuster, Inc. New York, NY.

[24] Fredrickson, Barbara. 2009. *Positivity: Top-Notch Research Reveals the 3-to-1 Ratio That Will Change Your Life.* Three Rivers Press. New York, NY.

Fredrickson's theory ties into Mihaly Csikszentmihályi's work, which describes a state of performance where level of ability matches level of challenge[25]. Flow is a state of engagement when someone is immersed in the present moment, completely focused on the task at hand, and performing or working at an optimal level. Focus with a clear goal, instant feedback, and a challenge that pushes a skill set are three of the conditions most conducive to flow. When an individual engages in an activity that pushes the boundaries of their performance, skill levels increase. Flow requires ever-increasing challenges to match the ever-increasing skill set. Much like the psychological equivalent of Wolff's Law, which states that the body adapts to the load under which it is placed, someone who experiences flow will adapt to the challenges that are present.[26]

### D. Life Coaching helps clients to use both growth and fixed mindsets to develop increasingly empowering perspectives that lead to effective action.

In her book *Mindset: The New Psychology of Success* (2006), psychologist Carol Dweck made an important distinction between two common mindsets based on an individual's perspective on talent and ability.[27] A fixed mindset points to innate talent as the source of ability. Someone with a fixed mindset would agree with the statement "everyone has a certain amount of talent." They would argue that a person's talent level is fixed but that it can be increased within a certain range. The upside to a fixed mindset is confidence and a short-term boost in effort. The downside is that a fixed mindset can cause a person to avoid mistakes at the expense of learning as they attempt to prove their talent or natural ability.

A growth mindset points to effort and persistence as the source of ability. Someone with a growth mindset would agree with the statement, "Success is 1% talent, 99% perspiration." The downside of a growth mindset is its rarity. The upside is that people who have a growth mindset put more attention on effort, developing stamina, and learning from success and mistakes. Mistakes are seen as an excellent chance to learn. Goals become more about creating a focus point and ensuring continued effort than a way of proving talent.

[25] Csikszentmihályi, M. 1975. Play and Intrinsic Rewards. Journal of Humanistic Psychology 15(3): pp. 41-63.

[26] Stock, Jay T. 2018. Wolff's Law (bone functional adaptation). John Wiley & Sons, Inc.

[27] Dweck, C. S. 2006. *Mindset: The New Psychology of Success*. Ballantine Books. New York, NY.

Individuals with a growth mindset are more likely than those with a fixed mindset to continue working and putting in effort, even in the face of challenges and setbacks. From a growth mindset perspective, talent is simply the starting point, and failure and success are feedback for continual improvement. While a fixed mindset views maximum potential as measurable and knowable (such as earning a 100% on a test), a growth mindset rejects the idea of a known full potential. From a growth mindset, potential is unknowable and continually increases with feedback and effort. The effectiveness of coaching relies on a coach's ability to help clients shift toward a growth mindset as they take on increasingly challenging goals.

**E. Effective development of action steps.**

Behaviorism points to the importance of a cue in the environment prompting a certain learned action, ultimately leading to a reward. This cue-action-reward system forms our understanding of habits and provides clues regarding how to create habit change. Habit and behavior change theories can inform coaches on which areas are useful to explore when helping clients identify and change habits.[28] Designing those habits and systems with a coach is a tremendous opportunity to take a struggling area and make it thrive. In this training program, you will learn how to help clients establish well-designed actions and create systems to add structure conducive to behavior change. Accountability is a huge part of what makes a coaching relationship powerful and helps clients follow through on their well-designed actions.

# How

# 7 Elements of a Coaching Session

A standard coaching session is 30 to 60 minutes in duration and includes these 7 elements:

1. **Connecting (about 2 minutes).**

   **Description:** This is your opportunity to connect with your client and continue to build rapport and trust.

[28] Duhigg, Charles. 2014. *The Power of Habit: Why We Do What We Do in Life and Business.* Random House. New York, NY.

**The purpose:** To greet each other and set the space. It's important because it establishes a safe space for coaching and allows the client to clear away any distractions and get focused on the present. It's also your first opportunity to gauge the energy your client is bringing to the session.
**Useful coaching questions:** How has your week been? What's something exciting or new that's happened since our most recent session? What are you looking forward to most in this upcoming week?

2. **Accountability (about 3-7 minutes).**

   **Description:** This is your opportunity to follow up with your client on their actions from your previous session together.
   **The purpose:** To explore follow-through with your client, which can reveal their commitment to themselves, others, projects, and their goals. Making space for accountability at the beginning of a session provides a strong framework and sets a good habit for both the coach and client.
   **Useful coaching questions:** How did your action items go from our last session? To what degree were you successful with your actions from our last session? What got in your way of following through? Who do you need to be to follow through next time?

3. **Session Agenda (about 3-5 minutes).**

   **Description:** This is a discussion about the topic for the session, including the importance of the topic and how success will be measured for the session.
   **The purpose:** To create focus and clear criteria for determining the success of the session. A strong agenda sets the foundation for a productive coaching session and provides the infrastructure to come back to when your client takes tangents or seems to be getting away from what they wanted to accomplish.
   **Useful coaching questions:** What would you like to discuss today? What would you like to focus on today? What area of your life would you like to be even better?

4. **Exploration (about 20-40 minutes).**

   **Description:** This is where coaching skills, tools, and exercises are brought to the coaching session.
   **The purpose:** To leverage coaching skills, tools, and exercises that increase the client's awareness of themselves. This is the portion of the session where the coach explores

with the client their Learning and Being, using the agenda as the foundation for exploration.
**Useful coaching questions:** What are you learning about yourself? Who do you need to be to make this happen? What do you need to learn to move in the direction you want to go? What character traits do you need to draw from within yourself?

### 5. New Actions and Accountabilities (about 5-10 minutes).

**Description:** This is when you co-create well-designed actions with your client, which become the accountability topic for the next session.
**The purpose:** To transform the learning from the coaching session into tangible action. Co-creating well-designed actions with clients empowers them to be resourceful, drawing on their own knowledge and experience. It empowers them to become the expert on themselves.
**Useful coaching questions:** What action would you like to take based on what you learned today? What's the very first step toward moving in that direction? When will you have this action completed? What might get in your way of taking this action?

### 6. Agenda Check-in (about 2 minutes).

**Description:** This is a check back on the original agenda to determine the success of the session.
**The purpose:** To empower the client to acknowledge the growth they experience, and for you to determine your own success as a coach. It is also another opportunity to build accountability into the coaching relationship.
**Useful coaching questions:** How did we do today? To what degree did we accomplish our original agenda for today? What do we still need to explore?

### 7. Logistics for Next Meeting (about 2 minutes).

**Description:** This is your opportunity to plan the details of your next session, including date, time, and location (if necessary).
**The purpose:** To minimize the back and forth in planning the next session. Discussing the logistics of the next session at a time when your client just experienced a successful session is also the most likely moment for them to choose to continue with coaching.
**Useful coaching questions:** What day and time works well for our next session? How frequently would you like to meet?

# Levels of Listening

## What

The most common distinction made in listening is whether or not someone is paying attention. Listening occurs when someone is hearing the words and making sense of them. Paying attention is required to listen, but in life coaching, an important distinction is made by examining the perspective of the coach in attending to the client's words. The perspective the coach takes as a listener matters, and empathetic listening has a measurable positive impact on the person who is speaking.[29] [30] Those different perspectives make up the three modes of listening:

- **Level 1: Listening for the sake of yourself.**

  Level 1 is when the coach listens for the sake of themself. It is necessary and useful when the coach is learning something and needs to know how it applies to their own life. When a coach is in Level 1 listening, they are often asking themself the following questions while the client is talking:

  - Is this really going to be useful for me?
  - Oh, that reminds of me of that time when [fill in the blank].
  - When is it going to be my turn to talk?
  - How does what this person is saying apply to me?
  - I wonder what I could say to look really good right now?

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[29] Bodie, G. D. 2011. The Active-Empathic Listening Scale (AELS): Conceptualization and Evidence of Validity Within the Interpersonal Domain, Communication Quarterly, 59:3, 277-295.

[30] Myers, S. 2000. Empathic listening: Reports on the experience of being heard. Journal of Humanistic Psychology, 40, 148–173.

- **Level 2: Listening from the perspective of the speaker.**

  This also relates to empathy, and coaches who are skilled at empathetic listening are able to effortlessly offer their own intuition and curiosity for the sake of the client.[31] Still, Level 2 listening goes further than just empathy (being able to identify correctly the emotion the client is feeling) to experiencing what the client is saying from their point of view. Such deep listening is powerful because it removes the interests and biases of the coach.[32] It forces the coach to be much more present and focus on what the client is really saying and feeling.

- **Level 3: Listening from the perspective of an outside observer looking in on the conversation.**

  For a coach, listening in Level 3 feels as if they are standing on one side of the room listening to both the client and the coach and asking themself questions like:

  - "How does what is being said relate to my client?" or
  - "If I were an outsider watching this coaching session, what would occur to me?"

  It is a powerful exercise to help the coach understand that communicating this deeply influences and shapes the conversation. At first, it can seem surreal or artificial, but with practice, it becomes comfortable for the coach to step outside the conversation to observe the interaction between coach and client, yet be fully present with the client.

# Why

Why Level 2 and Level 3 listening are more effective in coaching than Level 1 listening:

### A. Level 1 listening is not as effective in serving clients.

People listen in Level 1 most of the time. However, it can be easy for us to naturally slip into empathetic listening. For example, when a manager and employee are talking and

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[31] Cissna, K.N. and R. Anderson. 1994. Communication and the ground of dialogue. In R. Anderson, K.N. Cissna & R.C. Amett (Eds.), *The reach of dialogue: Confirmation, voice, and community* (pp. 9-30). Cresskill, NJ: Hampton Press.

[32] Stewart, J. & C. Logan. 2002. Empathetic and dialogic listening. In J.S. Stewart (Ed.), *Bridges, not walls: A book about interpersonal communication* (8th ed., pp. 208-229) Boston: McGraw-Hill.

listening deeply to one another, this can move into Level 2 listening, which better serves the speaker because it promotes deeper understanding and connection.

### B. Level 2 listening is a gift to the speaker.

For the coach, it feels like you are in flow with your focus on your client's every word, while also gathering the larger meaning and listening between the lines. Such a quality of listening is an acknowledgment that what the client is saying is so important that the coach is eager to put 100% of the focus on the client. It is rare in everyday life that clients have someone dedicated to listening to them with the intention to seek deeper understanding from their point of view. Clients feel heard, which is an incredibly powerful and rewarding experience for them.

### C. Level 2 listening takes practice and requires focus.

In most life coaching sessions, a coach will primarily be in Level 2 listening. The tricky thing about Level 2 listening is that it's not as easy as it sounds. New coaches tend to think about the next question or get caught up in the client's story and think about a similar story in their own lives. Coaches also might be so concerned with doing the coaching "right", and become more concerned about their performance than the client's experience. However, Level 2 listening begins to feel more natural with practice and focus, allowing the coach to be more effective in a coaching session.

### D. Level 2 feels good.

Another phenomenon that happens with new coaches is that they will slip into Level 2 for an extended period of time. It feels amazing. It feels like they can really understand the client on a deeper level and get lost in the client's words. In Level 1 listening, a coach is essentially listening to two people because they're focusing on what the client is saying while also processing their own internal dialogue. Level 2 listening is incredibly freeing because a coach is listening only and wholly to the client. It is a tremendously creative and fulfilling experience for a coach.

### E. Level 3 uses a third perspective.

Level 3 listening is an important way for the coach to attend to the client-coach relationship. It helps the coach think about the conversation from a different perspective and point of view to make sure that they are strengthening the relationship and the professional bond. It is a chance to shift slightly and expand focus to be an even more effective listener for the client.

# How

An effective coach is self-aware and skilled in choosing the mode of listening that is going to be the most useful to the client.

1. **How to listen in Level 2:**
    - Begin by paying close attention to the words that your client is saying.
    - Allow yourself to listen so closely that you could say the same words silently to yourself as your client says them. When you are listening that closely, it feels like an intense form of concentration. Allow your thoughts to be centered on the client.
    - Ask yourself, “How does what this person is saying apply to them?” Allow yourself to be curious for the client’s sake.
    - If you find that you have slipped back into Level 1, simply consciously return to Level 2. At times, Level 2 listening feels like you are constantly recovering from Level 1 back to Level 2. Such an experience is okay, as long as you remember to consistently recover. Gradually, you will find it easier to be in Level 2 with your client for longer periods of time.
2. **How to listen in Level 3:**
    - Begin by listening deeply to your client in Level 2.
    - As you are listening, ask about something you are curious about.
    - While your client answers your question, imagine that you are on the other side of the room, both listening to the client and watching yourself listen to the client.
    - Ask your client another question, and try to stay in that third-person point of view. It may feel a lot like mental gymnastics at first, but as you get used to thinking and listening in this way, you will find it to be incredibly powerful in helping you listen more actively.

# Structured Improvisation

## What

A strong structure (clear session agenda, action steps, and accountability), gives you, the coach, increased flexibility to play with ideas, take tangents, and follow your client wherever your client wants to explore. Such exploration functions like improvisation. Improvisation is the skill of fully partnering with your client to co-create the coaching experience. It requires being comfortable with the unknown and dancing with the unforeseen. It has two primary rules (which are more like guidelines):

***1. Accept what is offered.***

***2. Add value.***[33]

The same rules apply in improvisational acting. There is no script, but there is a structure. One of the first rules of improv acting is the "Yes, and" rule. In Improv 101, whenever your acting partner offers an idea, you reply with "yes, and," and add to the scene, rather than over evaluating or dismissing the idea.

Life coaching (and life, for that matter) operates effectively on these same two guidelines. A coach does not know what is going to happen in any session or how the client is going to be when they show up. However, the coach is open to accept whatever the client offers, and the skill of coaching is to go with whatever comes up. Such mental flexibility requires you to be grounded in the present moment and confident that you can dance with the unexpected. Coaching feels easy, effortless, and immensely fulfilling when you learn to trust yourself, your client, and the coaching process because you know your client is receiving tremendous value.

The opposite of accepting what is offered is called blocking. Blocking denies the client's idea or the premise of the scene. It can be direct: "I don't think that idea will work." However, it is most effective when the coach uses blocking or accepting consciously and for a purpose. Far too often in a school, family, or business setting, people tend to block out of habit.

With a few exceptions, it is essential for a coach to accept what is offered in a life coaching session. Yet having a structure behind accepting the offer and adding value to it are equally important. The structure behind accepting the offer is for a coach to hold the focus on the client's

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[33] Hines, W. 2016. *How to be the Best Improviser on Earth.* Pretty Great Publishing.

agenda, ask powerful questions, and use any other life coaching principles and exercises that apply.

# Why

### A. Structured improvisation works well because it mirrors the natural flow of experience.

Something comes up. A coach has a choice to block it and actively work against it. Or, the coach can accept it and use it for future action. Sometimes it is best to block. Other times, it is best to go with what the client wants.

### B. Being flexible while having a useful structure is ideal.

The life coaching process contains a balance between flexibility and structure, and it is one of the reasons coaching is so effectively employed in a myriad of personal and professional situations.

### C. Structure provides freedom.

Clients become stressed when the system they are using cannot handle the demands placed on it. “Stress” originates from a technical term describing the strain placed upon a certain material, such as steel used in a bridge. A steel beam can easily support a great deal of weight, but it becomes stressed and begins to bend when it reaches a certain point. Hans Selye, who first observed that homeostasis could not protect organisms from outside pressures, introduced the concept of stress into everyday vocabulary.[34]

### D. Structured improvisation leads to changing methods, tools, and systems.

When dealing with stress, most clients rely on the same methods, tools, or systems they use every day — they just try working harder. This method may work for the client. It certainly requires the least amount of creativity to solve the immediate problem. However, in the long run, it would be so much more effective for the client to take time to create new methods, tools, and systems to handle more work sustainably. This is possible through structured improvisation. Essentially, the core life coaching principles

[34] Fink, G. 2010. Stress: Definition and history. Stress Sci. 3-9.

form the structure for clients to handle whatever comes up in their life and work. The stronger the structure, the more the client and coach can handle.[35]

### E. Improvisation is unusual in most conversations.

In any conversation, most people are thinking, “How does this apply to me?” It’s a perfectly reasonable way to listen to someone and relate to other people based on our experiences. However, in a coaching setting, the coach can accept what the client brings and build from it. When a coach can effectively improvise, it adds value to the conversation and works with what the client is already thinking, augmenting it with the coach’s natural curiosity.

## How

The best way to master structured improvisation is to practice. The core coaching principles and the coach training sessions will give you the structure that you need to be a competent and confident coach. The challenge is how to get into the habit of accepting whatever your client brings to the coaching session.

### 1. Accept what your client says.

Judgment gets in the way. Judgement usually comes in two forms: either judging what your client is saying, or judging yourself as a coach. This is especially true when coaches judge how well they are doing, or how great their questions are, or what value their clients are getting out of the process. Allow your precious focus and energy as a coach to remain completely on your client.

### 2. Offer a question based on what you just heard.

A helpful technique is picking out the most interesting word from what your client just said, and building your next curious question around that word. For instance, if we were to pretend that a coaching client said something similar to the paragraph above, we could create a question based on the word “judgement,” such as “What’s the impact of judgment in your life?”

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[35] Yodo, N. and P. Wang. 2016. Engineering Resilience Quantification and System Design Implications: A Literature Survey. Journal of Mechanical Design 138(11).

3. **Stay curious.**

   Your natural curiosity will provide a fruitful path forward for your client. You can trust your curiosity–and Level 2 listening–to move your client forward.

4. **Have in the back of your mind one of the concepts in the coach training program.**

   Build your next question based on one of the concepts in the program. For instance, if you're working through a *Wheel of Life*, you can ask your client about the relationship between two areas on the wheel.

5. **Bounce back and forth between following the client and following the concept.**

   As you continue to work with your client, structured improvisation requires bouncing back and forth between following the client on tangents led by your curiosity and using the concepts of the program to inform your intuition on what to ask next.

# 1: Unified Theory of Coaching

## *Chapter Overview*

*Grounded in positive psychology, Coach Training EDU's approach to training is based in Hope Theory.*
*This section provides an overview of the theory, as well as two core skills a coach uses during a coaching session: powerful questions and direct communication.*

## *Essential Coach Qualities Covered*

*Professional. Empathetic. Curious. Courageous.*

## *Skill-Check Questions*

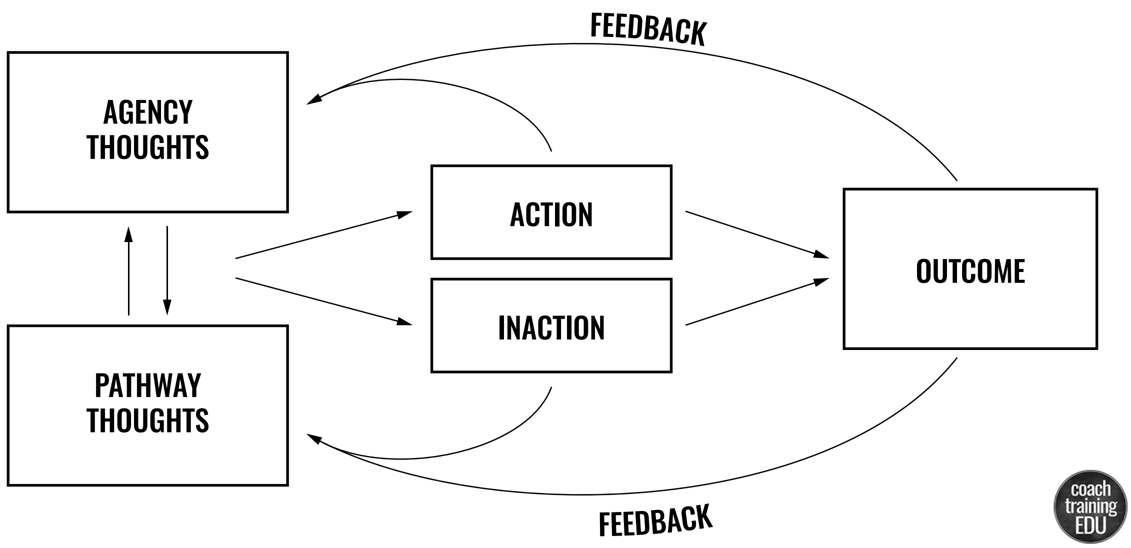
*What are the elements of Hope Theory and how do they play into a coaching session?*
*What are the elements of a powerful question?*
*How do I use direct communication in coaching?*

## *Etymology*

*Unified comes from two Latin words:* uni-*, meaning* one*, and* -fied*, which comes from the Latin verb* facere *meaning* to do *or* to make*. A unified theory relates individual elements to each other in a way that provides a deeper understanding of both the individual pieces and the synthesis of the whole.*

# Hope Theory & Learn-Be-Do

Several humanistic psychology theories have had a profound influence on the ideas that form the foundation of coaching. From theories like Abraham Maslow's Hierarchy of Needs to Carol Dweck's Growth Mindset, the number of theories and conceptualizations of human decision-making and goal achievement are vast. These elements offer a strong foundation for the efficacy of coaching. Out of the plethora of theories, Hope Theory, as developed by C.R. Snyder, stands out. It excels in its ability to explain the efficacy of the coaching model from both the coach's and the client's points of view. The model also aligns neatly with the Learn-Be-Do categorization of questions.




C.R. Snyder offers the following definition of Hope Theory: "Hope is a positive motivational state that is based on an interactively derived sense of successful (a) agency (goal-directed energy), and (b) pathways (planning to meet goals)."[36] He split motivation into four different aspects: agency, pathways, goals, and obstacles.

The first aspect includes the assumptions you have about who you are and what you can learn. In terms of Hope Theory, this is called "agency". One of the characteristics that distinguish a seasoned coach from an inexperienced coach is the degree to which the coach uses challenges and setbacks as opportunities to explore what the client is learning about themself, as well as what character traits the challenge is addressing. In other words, an experienced coach asks about a client's agency. In Hope Theory, agency is defined as one's belief in their ability to learn

[36] Snyder, C.R. 1995. Conceptualizing, Measuring, and Nurturing Hope. Journal of Counseling and Development 73(3): pp. 355 - 360.

the required knowledge and use or gain the required skills to achieve a goal. Many life coaching exercises, from the *Future Self* to the *Inner Critic*, apply tools to help clients take different approaches to develop a deeper sense of agency.

The second aspect is what action plan(s) you think will help to achieve the goal. In Hope Theory, this is termed "pathways". Pathways are routes you map to reach your goals, and they go one step further than traditional action plans. With pathways, it's important to think about the effort you want to put into achieving the goal and develop pathways that are worth your time and energy. Time is the landscape on which you map your pathways. Snyder explains that time is a continuum of past, present, and future, and we tend to think about time as a line. To construct a pathway, someone links sequential actions from their present toward their cognitive construction of a future goal. Very hopeful people tend to be very confident in their pathways, and their pathways tend to be well-articulated. If one pathway doesn't work, hopeful people can construct another one to reach their goal. On the other hand, people with low hope levels struggle to identify clear pathways. When pathways aren't clear, it is hard to commit to them fully, and if they don't work, it's easy to throw in the towel.

The next element of Hope Theory is "goals". Hope Theory is largely based on the idea that people are naturally goal-oriented. This goal-oriented thinking includes three different stages:

- **Stage 1.** Preliminary Decision-making Process. This stage includes decisions around goal choices and the value of possible outcomes. Learning, assumptions, and experiences of the past mixed with hopes, dreams, and fears of the future should be considered.
- **Stage 2.** Action Step Analysis. This stage occurs as you are immersed in the process of working toward the goal. During this stage, we measure our actions by the degree to which they achieve our desired results. This leads us to stay engaged, increase our engagement, take a break, or disengage.
- **Stage 3.** Reflection and Learning. This stage is marked by the absorption of experiences that happen when the results tumble in. This final stage feeds back into ideas and assumptions about agency and possible pathways, completing the cycle and starting it anew.

Goals can range from lofty (such as introducing and cultivating coaching concepts in the way we learn, work, and live) to simple (such as cleaning the office desktop). We can consider goals through agency, pathways, and the value of the outcomes which may appear immediately or reveal themselves over decades to come.

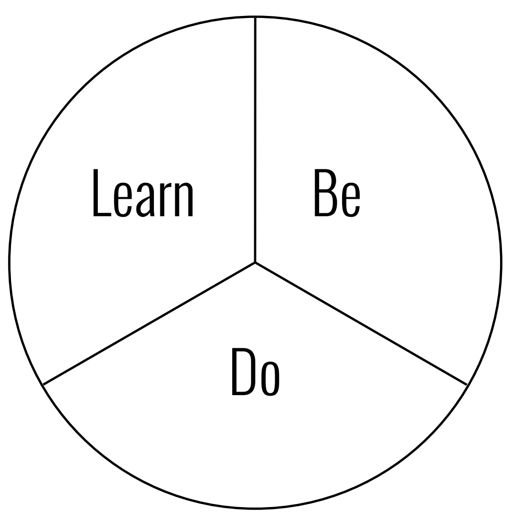
The final element of Hope Theory is the "obstacle." Borrowing from Mihaly Csikszentmihalyi's Flow Theory, obstacles are necessary for the process of optimal experience. Without some kind of challenge, one can't slip into the optimal experience ("flow"), where one's skill set matches the challenge at hand, brings about awareness, and is intensely satisfying. When obstacles confront us, Hope Theory helps us look at how ideas and emotions about our agency and pathways interplay to either increase or decrease our engagement.

## Hope Theory as a Unified Theory of Coaching

The magic begins when you consider the dynamic between agency and pathways in all stages of motivation and the elements of coaching. Coaching excels at helping clients improve the quality of the decisions they consider. During coaching sessions, clients explore ideas and assumptions about their expectations, perspectives, skills, limiting beliefs, and mindsets. They mindfully craft action steps and accountability. When working with a skilled coach, a client learns to address their empowered assumptions about agency, and clarify options and insights about possible pathways to reach their goals.

Over the past decade, Coach Training EDU has adopted a Learn-Be-Do model of categorizing questions, giving coaches-in-training a framework for the kinds of questions that are useful while coaching. This framework aligns well with the aspects of Hope Theory. Indeed, each framework gains depth when combined with the others.

**Coach Training EDU's Model of Question Categories**



"Learning" points primarily to the insights clients have about who they are and what they can achieve. From this perspective, a coach might ask a client, “What are you learning about yourself (in this moment, or in the current situation)?”  Learning also involves the strategies and action steps required to achieve a goal. An example of a coaching question that includes learning would be: “What new skill is this challenge requiring you to develop?” When incorporated into Hope Theory, Learning most heavily lines up with agency and pathways.

"Being" questions refer to the characteristics your client already has or wants to develop. Being also includes the energy a client brings to a project, assumptions about their abilities, and assumptions about what new achievements mean to their identity. A coaching question might be: “What would this accomplishment mean to how you think of yourself and your character traits?” When meshed with Hope Theory, Being lines up with agency, goals, and obstacles.

"Doing" refers to the action steps and systems a client puts in place to achieve a goal. Usually, toward the end of a coaching session, a client will design an action step to implement before the next coaching session. The coach and the client then co-design how best to help the client stay accountable and incorporate the insights gained from the coaching session into their implementation of the action step(s). A typical question would be: “Based on everything we covered in our session, what are a few action steps that you want to take in the next two weeks?” When applied to Hope Theory, doing lines up with pathways, goals, and obstacles.

# Hope Theory & Learn-Be-Do in Action

Let's use the theoretical link between Hope Theory and Learn-Be-Do to see what this practically looks like during a coaching session. We'll quickly review the first six of the 7 Elements of a Coaching Session (the last element is to set the logistics for the next session), and we'll look at how Hope Theory and Learn-Be-Do play a role in each element.

1. **Connection.**

   Connection is greeting your client in a way that resumes your rapport with them while establishing a safe space for your coaching session. This part leads either to checking in on past actions (Accountability) or to setting an agenda for your current coaching session (Set the Agenda).

2. **Accountability.**

   Accountability looks at what your client has accomplished since the previous coaching session. It is the practice of reflecting on prior goals and pathways to create insights and learning that inform your client's sense of agency and ideas for new pathways.

3. **Set the Agenda.**

   Agenda Setting is your client's chance to take control of the coaching session. On a deep level, it empowers a client to articulate an immediate, tangible goal. In the Hope Theory model, you ask your client to clarify a goal that impacts your client's agency.

4. **Exploration.**

   Exploring Learning and Being using coaching tools is usually the majority of every coaching session. Your client has an opportunity to address ideas and emotions around agency. This often includes aspects of exercises such as *Empowered Perspectives, Busting Limiting Beliefs,* managing Inner Critics, or tapping into insights from the *Future Self* exercise. Learning and Being is woven into the tapestry of the interaction between thoughts and feelings about agency, goals, and possible pathways.

5. **New Actions and Accountability.**

   Using the insights from the previous exploration, it’s time to craft action steps. This element of a coaching session focuses on pathways and goals. Your client has the opportunity to craft action steps to complete between now and your next coaching session.

6. **Agenda Check-in.**

   Checking in on Session Agenda and Logistics for Next Session completes the 7 Elements of a Coaching Session. While checking in on logistics doesn't necessarily have a direct parallel to Hope Theory or Learn-Be-Do, checking in on the Session Agenda does. Checking in on the Session Agenda gives clients one final chance to reflect on the goals, pathways, and agency discussed during the session. Learning and Being questions can be important here, especially if the client is doing internal work over the course of the next week.

# Powerful Questions

Powerful questions form an essential part of the coaching skill set. This coaching skill relies on empathetic, active listening to craft meaningful, curious questions that provide tremendous value to the client. Powerful questions are effective because they invite a client to shift the way they perceive themselves in the context of a question or challenge. Such questions have the power to reveal possibilities that the client maybe never considered or perhaps assumed were unattainable. When employed with the rest of the coaching toolkit, powerful questions can trigger both self-reflection and motivation, which serve as the foundation for a client's agency to build pathways toward their goals.

## What

Powerful questions are short, direct, open-ended questions that are designed to elicit insight and learning. They help clients build motivation to help them follow through with action. Powerful questions have the following characteristics:

- **Open-ended, start with the words *What, Why,* or *How* (and sometimes *Who, Where,* and *What if).***

  Powerful questions are usually fewer than ten words. They are direct in that they cut to the heart of the matter. Powerful questions usually start with *What, How, When, Where,* or *What if,* leading to thought-provoking answers. This contrasts with closed-ended questions, which result in "yes" or "no" answers that provide only limited information and insight. Closed-ended questions typically start with the words *Is, Do, Does, Will, Are,* or *Have*.

- **Provocative and exciting to answer.**

  Powerful questions also have a certain force about them that make clients want to answer. They are usually questions that may have been roaming around in a client's mind but haven't been fully addressed or asked directly. Neither the client nor the coach knows the answer to the question until it is asked, but it's a great question for the client to consider.

- **More than facts.**

  Powerful questions are not merely about factual knowledge or information. Instead, they address thoughts, habits, and emotions that may not have any known right or wrong answers. When a coach asks a powerful question, the client has an opportunity to deepen their learning and assess the things that are most important to them. It's a chance to try out ideas and see which ones have the most energy. It is also a chance for the client to explore an emotion or use their imagination to conjure up how great it will actually feel to reach an accomplishment.

- **Based on curiosity.**

  All powerful questions are based on empathetic curiosity. These are questions that invite the client to become more self-aware and confident about the action that they want to take.

# Why

### A. Powerful questions give the client space to create a solution.

The ideal solution for a problem comes from the client directly. Sure, general guidelines exist for what constitutes effective time management or the steps in building a successful business; however, the solutions to the deepest problems — and the ones most worth solving — come from within. The strength of a powerful question comes from the coach's invitation to the client to explore what is really going on from their point of view.

### B. Powerful questions are short.

Brevity is beautiful, and it focuses the client's mind on one topic without too much extra information in the way. Short, powerful questions also lends to creating space for the client to explore. Remember, you want the client to speak nearly 90% of the coaching session.

### C. Powerful questions inspire creativity.

Most powerful questions start with *What* or *How*. Being open-ended allows the client to be creative with the answer and gets the coach out of the client's way. The coach's job is to tap into a client’s natural curiosity and point them in directions they haven’t explored before. By asking an open-ended question, the coach stimulates the client’s creativity and curiosity to explore and add value to the coaching relationship.

# How

Powerful questions require practice. It takes some time to get used to asking a question, then falling quiet to give space for your client to answer. Try to resist the urge to ask two questions at once, ask a long questions, or add a long explanation.

1. **Tap into your natural curiosity while listening empathetically.**

   When listening, imagine you *are* the other person. Get into your client's world. Then ask yourself what you would be most curious about if *you* were your client. You can trust your innate curiosity to guide you.

2. **Start your question with *What, How, Why, Who,* or *What if*.**

   “Why” questions can be great, but use them wisely since they could put your client on the defense. For example, it may be very insightful to ask, “Why is that important to you?” However, asking, “Why would you do that?” could cause the client to feel like they need to be defensive. Instead, try asking, “What reasons led you to do that?” The latter doesn't question the client’s character but instead focuses on the circumstances of the situation. Coming from a place of curiosity and steering clear of judgment is key.

3. **Keep your question simple and brief.**

   When practicing powerful questions, challenge yourself to create questions that are ten words or less. Leave out any explanation of your question, and avoid restating the client's previous response.

4. **Ask one question, then pause.**

   Give your client time to think and be introspective. It may feel like an uncomfortably long time in silence, but that's okay. From a client’s point of view, having that time to think and form thoughts is priceless. Keep in mind that it is likely that your client has never been asked questions like these before, so getting comfortable with silence is important.

5. **Listen empathetically to your client's answer.**

   Repeat steps 1-4 by using some of your client's language to craft your next powerful question. Bring to mind coaching models such as Learn-Be-Do and Hope Theory, as well as the other elements in coaching exercises found in this book, to inform your next question.

# Examples of Powerful Questions

## What Questions:

- What do you want to work on today?
- What is most important to you?
- What is the biggest change you need to make in yourself?
- What is the benefit?
- What is the cost?
- After you accomplish this outcome, what is the next step?
- What stops you from getting what you want?
- What do you need more of to achieve your goals?
- What do you need less of?
- What causes you the most fear?
- What are you learning — or do you hope to learn — about yourself?
- What values are most important to you?
- What specifically about that value is exciting to you?
- What is your ideal solution?

## How Questions:

- How important is that to you?
- How do you know it will be successful?
- How does that solution feel?
- How do you know?
- How can you be sure?
- How can you develop [character trait] in yourself?
- How is your action aligning with your intention?

## Why Questions:

- Why or why not?
- Why do you want to move forward?
- Why is it holding you back?
- Why do you want to learn this about yourself?
- Why does this perspective come up at that moment?

## Who Questions:

- Who do you want to become?
- Who do you most admire?

## What If Questions:

- If you could change just one thing, what would it be?
- What happens if you fail?
- What if you knew you would not fail?
- What if you had all the resources you needed

# Direct Communication

## What

Communication is about sharing ideas and information. Direct communication is the skill of being able to communicate and illustrate ideas clearly. Life coaches have the ability to provide value by using several tools to communicate directly with clients. Direct communication has several different components:

- **Information.**

  This includes the original idea, emotion, thought, or other information (i.e., the message a life coach wants to communicate) the coach notices. Although it can be a risk, a coach can call out a client's behavior during a session. This can lead to further exploration and some great coaching. For example, if a client answers "I don't know" a lot or changes the subject when you try to dig deeper, bring up that observation without judgment. Utilize it as an opportunity to coach around that observation.

- **The sender's intention.**

  When people are communicating information, the actual message and the intention, or how the sender wants the message to be understood, may differ.

- **The method.**

  The sender has a variety of choices about the method they use to send a direct message. The next section outlines many of the methods a life coach can use to communicate directly with the client.

- **The recipient's understanding.**

  The meaning of the message is some blend of the sender's original thought and what the recipient understands. Basing communication on the client's understanding is useful when thinking about developing the method and content of the message.

- **The relationship.**

  There is always some relationship between the sender and the recipient. The designed relationship of coach and client allows for more direct communication.

# Why

A. **Clarity cuts through confusion.**

Direct communication sends a clear message. This clarity aids a client in cutting through their excuses, limiting beliefs, and worn-out habits to focus on what is truly important.

B. **Empathetic listening creates safety and the ability to fine-tune understanding.**

Direct communication is incredibly powerful because a coach in Level 2 listening is able to adjust communication for the client's understanding. The coach can ask the client powerful questions to ensure that the message has been understood in a way that aligns with the coach's intentions.

C. **Taking a risk as a coach shows courage and builds the coach-client relationship.**

From a life coaching point of view, direct communication is not just communication for the sake of sharing ideas. It also acts as a method for the coach to strengthen the coaching relationship.

# How

1. **Identify the message you want to share with your client.**

   The first step in direct communication is being mindful of both the message you want to communicate and how you intend your client to understand the message.

2. **Make sure you are in Level 2 listening.**

   Taking a moment to ensure you are listening in Level 2 listening — truly imagining you are the other person in the moment — helps you deliver the idea effectively and with compassion.

3. **State your idea as clearly and simply as you can. Then ask a short question.**

   You want to avoid folding an idea into a question that acts as a suggestion. For example, it's not as effective to ask, "Do you think it'd be a good idea to plan out your week every Sunday night, or at least have a weekly planning time to go over your workload?" Instead, you could state, "I think you need to have a weekly time to plan." And follow with a question, "What do you think?"

4. **Closely watch the reaction of your client.**

   A strong life coach maintains awareness of the client's experience. By continuing to listen empathetically, you can hold the space with curiosity. It takes courage to share, and hold the space for someone to process a challenging idea.

5. **Ask a follow-up question.**

   It could be as simple as "What do you think?" Or "What was it like to hear that idea?"

# 2: Design the Alliance

## *Chapter Overview*

*A skilled coach creates clear coaching expectations and space to mindfully design a coaching relationship that fully empowers the client.*
*This session explores how the coaching exercises Design the Alliance and Setting the Strategic Agenda add to the effectiveness of the coach-client relationship. It concludes with looking at two coaching tools: Bottom Lining and Asking Permission.*

## *Essential Coach Qualities Covered*

*Professional.*

## *Skill-Check Questions*

*What are the characteristics of an effectively designed alliance?*
*What are the four elements of a strategic agenda and why do they matter?*
*When would a coach use Bottom Lining or Asking Permission?*

# Knowledge v. Empowerment Basis

Design the Alliance is a set of agreements, both explicit and implicit, on the logistics, focus, and tone of a coaching relationship. Because the context of your coaching sessions impacts the quality of your coaching, it is vital to establish how you and your client will work together. It consists of the details and steps a coach takes to ensure that the client-coach relationship is strong, and the environment of each session allows the client to feel comfortable taking risks and being courageous. The coach is merely a facilitator who sets the stage for the client to perform and discover.

The foundation of your work — the balance between a knowledge and an empowerment basis — is a critical aspect of the client-coach relationship. It needs to be addressed before the coaching starts as well as during the designed alliance session. Let's explore these two different models of providing value that impact all the other elements of your coaching.

The first approach is the knowledge basis, in which the consultant or coach knows the resources, information, and next steps the client needs to take and provides advice accordingly. When you apply Hope Theory to this approach, you move directly to pathways, which naturally leads to goals and obstacles.

The second is the empowerment basis, in which the advisor or coach uses coaching questions to help clients arrive at their own unique insights and pathways forward. Combining the empowerment basis with Hope Theory allows you to start with agency (the Learning and Being of the client), look for insights, and move to pathways only after exploring who the client is and where their motivational energies might lie.

As a consultant using coaching methods, or as a coach who also has to deliver knowledge-based information, the challenge is balancing both approaches and providing advice with caution.

# The Science of Knowledge vs. Empowerment-based Coaching Approaches

The studies mentioned in this section are largely based on therapist-client relationships. While we acknowledge that coaching and counseling differ in their approach, the rich research in establishing solid relationships with clients helps inform an enhanced coaching practice.

A 2006 study found that the most successful therapists created an environment in which the client felt that they were being treated as a fully capable person[37]. Coaching takes this one step further by treating clients as if they are whole - not broken. This is where empowerment begins, and as the research points out, this kind of foundational relationship is highly successful.

With this foundation, clients begin to see themselves as active participants in their coaching process. In another study, researchers found that clients overwhelmingly expressed a preference for feeling like they are helping themselves rather than feeling like their therapist is doing all of the work for them[38]. However, some research points to the benefit of advice-giving, with one study citing 67% of participants finding advice helpful to their process. One of the most beneficial forms of advice came in the form of homework, which we call "action steps" in coaching. Co-creating a plan for clients to work on or pursue between sessions can reap many rewards for positive growth[39].

The key to this balance that seems to be most prevalent is collaboration. Too much advice-giving, and clients are likely to shut down and/or become dependent on the coach for answers to their problems. Not enough support, and clients can feel lost. On average, client collaboration declines after providing advice, but when therapists push a client's learning through reflection and exploration, the scales again find balance[40].

So what's the final verdict?

It can be awkward to constantly try to avoid sharing advice or offering action steps that you know have worked well for other clients. There may be times where you have information about available resources or useful steps that your client could take. When you choose to share this information, you will want to do so carefully, so you’re not creating a dependent or reliant coaching relationship. Again, the real skill is in balancing working from both a knowledge basis and an empowerment basis. The core tenet that separates coaching from counseling, therapy, advising, personal training, and any other related field is the idea that the client is the expert,

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[37] Gassmann, D & Grawe, K. (2006). General change mechanisms: The relation between problem activation and resource activation in successful and unsuccessful therapeutic interactions. Clinical Psychology & Psychotherapy. 13. 1 - 11. 10.1002/cpp.442.

[38] Hoener, C., Stiles, W., Luka, B.J., & Gordon, R.A. (2012). Client experiences of agency in therapy. Person-Centered & Experiential Psychotherapies, 11(1). 64-82. http://dx.doi.org/10.1080/14779757.2011.639460

[39] Duan, C., Knox, S., & Hill, C.E. (2018). Advice giving in psychotherapy. In MacGeorge, E.L. & Van Swol, L.M. (Eds.) The Oxford Handbook of Advice. (pp. 176-195). Oxford University Press

[40] Prass, M., Ewell, A., Hill, C.E., & Kivlighan Jr., D.M. (2020). Solicited and Unsolicited Therapist Advice in Psychodynamic Psychotherapy: Is it Advised?. Counselling Psychology Quarterly. DOI: 10.1080/09515070.2020.1723492

complete and whole, without any broken parts that need to be fixed. The coach's role is to draw out the client's own knowledge through deep internal exploration.

Bringing this distinction into the conversation around designing your alliance lets you lay clear expectations about the nature of consulting or advising versus coaching. This is an essential part of a strongly designed alliance, especially if you choose to leverage a workbook or worksheets in your coaching session. Having a workbook or set coaching program is a powerful marketing and organizational tool, but must be used in balance with fully empowering the client to direct the goals and the tone of the coaching session.

This chapter looks at the elements and the theoretical foundation of a designed alliance between a coach and a client. The three major aspects of a designed alliance are: setting the strategic agenda, meta-coaching, and accountability. This chapter concludes by looking at Asking Permission and Bottom Lining as additional coaching tools, which can be helpful but should be used sparingly.

# Strategic Agenda

## What

The strategic agenda is the overarching reason a client is seeking out coaching in the first place. A well-designed strategic agenda is utilized at the beginning of each session and has four elements: the Topic, its Importance, the session's Measure of success, and the Echo. This is the T.I.M.E. model.

- **TOPIC.**

  The topic is what you are actually going to address in the session. Most of the time, clients come to coaching sessions with something they want to discuss. Sometimes, they may struggle to pinpoint or articulate it. It's your job to ask questions that elicit a topic that digs into the foundations of their presenting issues. It’s best not to overthink this step, but it’s an important step to include in each of your coaching sessions. The trap is to assume both you and your client have an implicit understanding of what you want to focus on. Asking the client to say the topic aloud acts as a foundation for the rest of the session.

- **IMPORTANCE.**

  The next step is to explore the meaning behind the topic. Your job is to look at the degree to which this topic matters. Exploring importance is a way to gain a sense of the impact and value coaching brings to the client. This simple exploration might yield a deeper agenda or an aspect to the topic that matters deeply to the client. Uncovering meaning is often a jumping-off point to explore the deeper learning that awaits a client in the session.

- **MEASUREMENT.**

  Perhaps the trickiest element is a well-crafted way to measure the success of the strategic agenda. While sometimes difficult to identify, measurability adds depth and tangibility to your pursuit. A common way of measuring the success of a strategic agenda is defining a certain number of achievable action steps. At other times, coming up with a way to measure increased clarity or a meaningful perspective presents a challenge. My favorite way to add measurability to an intangible element such as "increased clarity" is something along the lines of “an insight so good you feel the urge to write it down.” You'll know that you're successful if you notice your client taking notes during the session.

- **ECHO.**

  The final piece of the strategic agenda is restating the agenda as a yes/no question. This is typically the only yes/no, closed-ended question you want to ask in the entire coaching session. Before and after the agenda, every question is best if it’s open-ended and starts with *What*, *Why*, or *How*. It’s best if your echo uses the exact words of your client and is as simple and straightforward as possible. The purpose of the echo is to confirm that you and your client are on the same page about the topic, its importance, and how you'll measure success.

# Why

Setting a solid agenda for your coaching session is the single most important task you can do to ensure a successful session. The session agenda acts as a foundation for you to come back to whenever it seems useful throughout the coaching relationship. The more structured the beginning of a session, the more freedom you have to explore tangents, client’s Learning, different perspectives, and ways of Being. You can immediately relate what’s currently happening in the session to the original agenda for fresh insights.

# How

Setting a session agenda is the most formulaic and scripted portion of a coaching session. It’s best to keep the questions simple. Even if you asked questions identical to those listed as examples, you’d provide a solid and useful foundation for your coaching session. Here are some sample questions for each component of the T.I.M.E. model:

1. **Topic:**
    - What do you want to focus on today?
    - What would be useful for you to look at today?
    - What would you like to spend our time on today?

- What could we look at today that would radically change your life?
- What would be the most useful thing to look at in the next 30 minutes? (or whatever timeframe you have)
- What part of your life would you like to be even better?

2. **Importance:**
    - If we were to accomplish the agenda today, what would change in your life?
    - If we were successful today, what difference would it make?
    - How is this agenda connected to other areas of your life?
    - How meaningful is this agenda?

3. **Measurement:**
    - How could we measure the success of our session?
    - How many action steps do you want to design?
    - To what degree would finding, exploring, and naming a new perspective be enough?

4. **Echo:**
    - Example: Just to be clear, you want to focus on crafting a new, empowering perspective, and we'll know if we're successful today when you feel like the insights are so good, you need to write them down?
    - Example: So, today, it'd be useful to design a new routine for when you get home for the day, and we'll know we're successful if we have three clear action steps?

When echoing the agenda to your client, you're looking for a clear and emphatic "yes." Anything less, such as hesitation, mumbling, or tweaking of words means that you need to ask a few more questions to clarify the agenda and echo again.

While the Topic always comes first and Echo always completes the process, Importance and Measurement might sometimes switch places. For example, if it seems natural to ask about Measurement right after the Topic, go for it. You can then ask about the meaningfulness of the topic and echo back to the client. The most important aspect of setting the agenda is moving through all the elements quickly and efficiently while also listening for opportunities to later ask about deeper and bigger agendas.

# Meta-Coaching

## What

Meta-coaching is the part of designing the alliance where you talk about coaching and the coach-client relationship. It provides the chance to clarify everything about the coaching process and address possible assumptions your client is making that might be getting in the way. The challenge that most clients face in looking at coaching is the admission that something is wrong or missing. Addressing these assumptions, clarifying what coaching is, and deciding how to work together allows for a deeper partnership much earlier in the coaching process.

- **Confidentiality in the coaching relationship.**

  Rarely are two people so open about how they want a relationship to function. By addressing the relationship itself, both the coach and the client set a precedent for transparency and openness. This openness forms the foundation of trust and allows the client to take risks and be courageous in self-exploration. A professional coach has an ethical obligation to address client confidentiality and keep coaching conversations, topics, and descriptions private, unless the client grants permission to share. Such openness, coupled with confidentiality between the coach and client, creates a safe space to explore important and meaningful topics.

- **Agreements on using specific coaching strategies, exercises, or workbooks.**

  As the coach-client relationship develops, a sense of respect emerges. This respect demands that both the coach and the client are honest and value the coaching relationship. The coach can also let the client know that they may occasionally challenge them to think and act in ways outside of their comfort zone, interrupt them in order to stick to the agenda, an share their thoughts and intuitions even if it may not be easy for the client to hear. The risks taken by the coach need to be done respectfully, with the intention of moving the client forward.

Some other agreements you will make with your client are around cultural sensitivity and expectations around communication outside of the session. You will also discuss how you might use coaching exercises, worksheets, and workbooks to better prepare the client to achieve their goals. Finally, you will make agreements concerning the logistical details such as where you will meet, how long sessions will be, the physical environment in which the coaching will take place, and how you will communicate with a sponsor or guardian.

# Why

A. **A professional coach has an ethical obligation to accurately describe and prepare the client for what to expect from life coaching.**

The chief aim of any designed alliance is to help the client understand their role in the client-coach relationship and how to support the coach in designing a strong coaching relationship. When the client is proactive and understands that they also have the power to make the coach more effective, the designed alliance solidifies, allowing clients to understand and take ownership of the relationship's strength. Allowing clients to be proactive in establishing the coaching relationship sets a precedent for them to be proactive in other areas of their lives, as well.

B. **Establishing a strong coaching relationship creates the overall framework that will drive all the coach's work.**

A well-designed alliance instills confidence in your client. It empowers them to see themselves as an equal partner along the coaching journey. Throughout the coaching process, clients understand the style of their coach, as well as the types of questions the coach typically asks. In essence, the client becomes trained in a deeper understanding of the steps they can take between sessions to get the most out of the coaching relationship and what is needed to make the relationship work.

C. **Designing the Alliance ensures that both the coach and the client are on the same page from the beginning, which only increases the effectiveness and possible outcomes of the coaching relationship.**

Being on the same page does not mean that the coach is the boss or knows more than the client. Being on the same page indicates that the coach and the client understand the current state of the coach-client relationship, where the client currently is, where the client wants to go, and what they want to achieve.

# How

Your main objective in the designed alliance is to get on the same page with your client and maintain open communication about what you can do better as a coach.

1. **Start by talking about what an alliance is, and what you hope to get out of the exercise (such as "being on the same page").**

2. **Go through the prompts, and design your relationship with your client:**
   - What best motivates you?
   - How do you move into action?
   - What requests do you have for me?
   - What do you think I should know?
   - What's working so far?
   - What's not working so far?
   - How will you know that coaching has been successful?
   - How do you want to treat confidentiality?
   - How do you want me to help with accountability?
   - Do you prefer more heart or more heat?
   - Where would you like to meet for our session?
   - What's the best way to communicate between sessions?
   - What type of support are you looking for between sessions?

# Accountability

## What

Accountability is much more complex than it appears on the surface. It requires two critical elements for success: monitoring and consequences from both an internal and external perspective[41]. According to Gretchen Rubin's book, *The Four Tendencies*, there are four different types of people when it comes to accountability, each some combination of 'meets outer expectations,' 'resists outer expectations,' 'meets inner expectations,' 'resists inner expectations'[42]. And while there are variations within each type, people largely fall into one of Rubin's Four Tendencies. Understanding whether or not your client meets or resists inner and outer expectations is crucial when co-creating well-designed actions and accountabilities.

For those who respond well to outer expectations, incorporating things like continuous feedback, support groups, and regular check-ins can be powerful ways to help clients stay on track. For those who respond better to internal expectations, incorporating competitive elements, rewards and punishments, or even designing accountability to a Future Self can be powerful aspects of well-designed accountability.

While incorporating those elements is helpful, continuous monitoring and consequences are the most effective way to keep accountability strong. Sharing your progress with a reliable support person from week to week has been known to increase goal achievement by as much as 33%[43]. That's what makes coaching so impactful - with continuous monitoring, our profession is built to increase the likelihood that our clients reach their goals. However, when it comes to consequences, it's best to design what that will look like directly with your client. It's important to create consequences that the client will honor and find meaningful.

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[41] Peterson, D. B. (2011). Executive coaching: A critical review and recommendations for advancing the practice. In S. Zedeck (Ed.), APA handbook of industrial and organizational psychology, Vol. 2. Selecting and developing members for the organization (pp. 527–566). American Psychological Association.

[42] Rubin, G. (2017). The four tendencies: the indispensable personality profiles that reveal how to make your life better (and other people's lives better, too). First edition. New York: Harmony Books.

[43] Tabaka, M. (2019, January 28). New study says this simple step will increase the odds of achieving your goals (substantially). Inc.com. Retrieved September 10, 2021, from https://www.inc.com/marla-tabaka/this-study-found-1-simple-step-to-practically-guarantee-youll-achieve-your-goals-for-real.html.

As a tool, accountability helps the coach manage a client's action. From the client's perspective, it is a powerful tool to keep them moving toward their goals. Accountability, at its best, also serves as a structure to measure the effectiveness of a client's action and the systems the client has in place. Here are the components of accountability:

- **Measurable results based on well-designed actions.**

  Accountability has a clear and measurable result.

- **Time set to take the action.**

  Accountability often includes a plan of when the client is going to take the action.

- **Time set when action is complete.**

  Accountability also has an end point or a due date for the action.

- **Consequences.**

  Consequences don't have to feel like a major punishment, but they should include something meaningful for your client. For example, "If I don't complete my spreadsheets by the end of the week, I will stay late to finish them on Friday." No one likes to stay at work late on a Friday, so making this the consequence provides an extra boost of motivation to complete the action item. It's important to note that the consequence should be something the client intends to honor. If they make plans they cannot change for that Friday night, encourage them to think of another consequence.

- **Direct communication.**

  Accountability has a time and method for letting the coach know that the action was taken. Usually, this is an email, text, or voicemail, or it can be a check-in at the beginning of the next session.

# Why

### A. Gives structure to action.

Accountability is effective because it serves as a benchmark and a structure for the client to gauge an action's success (or failure). It uses well-designed actions as a baseline for measurement.

### B. Provides feedback on the system.

Systems are crucial to success. Accountability is as much about a client following through on specific actions as paying attention to the learning and effectiveness of a system that is in place.

### C. Manages motivation.

The coach's expectation that the action will be undertaken and the potential consequences, if it is not, can be wonderfully motivating for the client.

### D. Strengthens the coaching relationship.

Accountability is also an opportunity for the coach and the client to redesign their alliance to serve the client best. If a client is having a hard time following through on accountabilities, it is an opportunity for the coach to address this issue in the context of the coaching relationship.

# How

### 1. As an extension of meta-coaching, you have an opportunity to design with your client the most useful way to hold themselves accountable.

The first place to start is with curiosity about the systems your client currently has in place and how effective those systems are. Additionally, it's important to explore how your client responds to both internal and external accountability. Knowing which type of accountability they respond to most will help you co-design the most effective action steps moving forward.

2. **Determine the balance of accountability between you and your client.**

   You have options with how often you reach out to clients and how available you are to connect between coaching sessions. Your availability and willingness to be available play a role in designing responsibility for the accountability between you and your client. Some coaches actively reach out to clients. Other coaches ask clients to reach out to them actively. Whatever the design, it's helpful to address the balance directly.

3. **The same principle holds true regarding how you design the use of a program or workbook and life coaching exercises.**

   You and your client design the balance and ways to track follow through.

4. **If you find that your client is generally following through and taking action steps between sessions, it is a great idea to explore the elements that are working well.**

   You could ask your client to come up with a three-step plan to help others achieve the same success in follow through. Inevitably, insights and places to explore emerge from such a thread of curiosity.

5. **If you find that your client is not following through, you have a few options as a coach.**

   The first option is to use your client not following through to explore and mine for even deeper insights. There might be value in a client experiencing the raw emotion of admitting that they did not follow through on a promised action step in a life coaching setting. Whatever ideas or emotions come up for the client, it's useful to explore.

   The next place to explore is your client's relationship to accountability by directly addressing it. You could ask questions such as, "How do you want to relate to accountability in your life?" "In what way is accountability useful?" "In what way is it useless?" A useful perspective to take when following such a coaching thread is to seek an insight that has even more value than if your client had followed through on the action in the first place.

6. **Determine how your client wants to be held accountable.**

   Do they want to email, text, or just check in at the beginning of next session? There is no industry standard for how involved or distant a coach is. This balance lives between your client holding themselves accountable and you as a coach holding them accountable.

# Asking Permission

As part of Designing an Alliance between a coach and a client, Asking Permission is a crucial skill in establishing a true partnership. In the typical flow of a coaching session, the session agenda is set early in the process. After an agenda is set, a coach usually has an idea of what coaching tools to use. Asking permission to use a tool or inquiring which direction they want to take during the session cultivates a sense of co-creating the coaching experience.

Asking permission is useful in addressing something personal with your client. It is your acknowledgment and respect for your client's courage and input on which direction to take the coaching session. For example, you could say, "I acknowledge your courage in bringing up this topic. Would it be ok if I asked some questions and we coached on it?" Or, "Something is occurring to me while you tell your story. May I share it with you?"

# What

- **Acknowledgment of respect for the client's input.**

  Asking permission starts with the coach's recognition that the client is talking about a sensitive subject or that you want to try a particular exercise. It emphasizes your partnership with the client.

- **"Yes/no" question.**

  Asking for permission is usually a "yes/no" question. Unlike the simple, curious questions that coaches ask most of the time (*What, Why,* or *How* questions), asking permission and the Echo of a session agenda are the two exceptions to this guideline.

- **The client's response.**

  The client will respond, often saying, "yes." However, listen very carefully for any hint of hesitant emotion or resistance.

- **Next steps.**

  If the client wants to continue with the topic or chooses to use the exercise, great; go for it. If the client hesitates or is unsure, you can ask the client in what direction they would like to go or what topic they would like to explore.

# Why

### A. Gives control to the client.

Asking permission is a way for you to partner with your client to co-create the agenda, outcome, and journey of each coaching session. Coaching differs from other practices in that the coach-client relationship is not hierarchical. It's not like a doctor, a consultant, or even a counselor, where the expert has more information or knows more than the client knows. Asking permission is a way for the coach to emphasize this key difference to your client and demonstrate that you want to work as much as possible to be an equal partner with them.

### B. Serves to clearly mark different points in a coaching session.

The typical coaching session consists of reviewing accountabilities, establishing an agenda, exploring that agenda, and creating new actions and accountabilities. Asking permission creates smooth transitions from one step to another during coaching sessions.

# How

### 1. Ask permission to explore a sensitive topic, use a specific exercise, or go in an entirely different direction.

Recognize the opportunity to ask permission because the topic is sensitive or because you see a need to emphasize your partnership with your client.

2. **Pay close attention to your client's response.**

   Notice the way the energy of your coaching session shifts. Ask yourself how you can use the moment to strengthen your coach-client relationship. Use the tool as a means of showing respect and designing a deeper alliance with your client.

3. **Read the client's response and continue the coaching, either along the lines of what you asked permission to explore, or ask your client which direction they want to go.**

   Of course, a coach may have suggestions or insights, but as soon as the coach shares that information, they should once again become curious about the client's experience and perspective. While a coach may dip slightly into the role of expert at times, asking permission is an effective tool to truly partner with clients.

# Bottom Lining

## What

Bottom Lining is when the coach asks a client to cut a story or an explanation short to identify the main point. It is a way to maintain focus in a coaching session, as well as keep the pace of the conversation moving. It usually consists of these parts:

- **An interruption.**

  Bottom Lining is an interruption. Like all interruptions, it can seem rude and clumsy. However, when you recognize that your client is telling a story that is chewing up time more than breaking new ground, it is time to jump in and interrupt.

- **Empathetic listening.**

  Level 2 listening helps make Bottom Lining an effective tool. When you are listening from the perspective and for the sake of your client, your interruption is in service to your client. Moreover, listening deeply, even taking time to mirror your client's voice and speech pattern silently in your head, can get you into your client's rhythm of speech. That helps you jump into the conversation more naturally and ease the interruption into something useful for your client.

- **Explanation.**

  If needed, you can explain to your client that you want to interrupt not because you are not interested in their story, but rather because you want to make the best use of your coaching time together. You can let your client know in the beginning of your professional relationship, perhaps when you Design the Alliance, that there may be times when you interrupt them in order to get back to the agenda.

- **Refocus on session agenda.**

  Unlike interruptions in everyday conversation, an interruption by a coach has the purpose of helping move your client forward by refocusing on the client's larger agenda.

# Why

### A. Provides focus.

Stories and explanations can lead to tangents that take away the focus and the time of a coaching session. Asking for the bottom line preserves focus.

### B. Saves time.

Time in a coaching session is precious. As fun as a good story is, serving the client by asking questions that they have not considered, or pointing them in a particular direction, will help get to another level. It is simply a better use of time.

# How

1. **While listening in Level 2 or 3, recognize that your client could benefit from cutting their story short and getting to the main point.**

2. **Interrupt your client.**

   If you feel the need to explain, tell the client that you are interrupting to keep the focus and maintain the pace of the session. Many new coaches feel uncomfortable interrupting their clients, which is why it's important to design how these kinds of interruptions will be handled as part of your coach-client alliance.

3. **Ask them to identify their main point.**

4. **Follow up with a powerful question.**

# 3: Coach the Client, Not the Problem

## *Chapter Overview*

*An experienced life coach avoids trying to find solutions and instead uses current challenges and setbacks as opportunities to create meaningful insights.*

*Defining and exploring the different agendas — from the influence of the problem's perspective to the power of a deeper agenda — are covered first in this section. This section also looks at the coaching skill of Intuition and the effective role it plays in a coach's development.*

## *Essential Coach Qualities Covered*

*Professional, Curious, Courageous*

## *Skill-Check Questions*

*What are the defining characteristics of the different agenda types?*

*What exactly is Intuition in a coaching context, and what makes it an effective coaching skill?*

## *Etymology*

*The word agenda comes from the Latin agere, which means to do. An agenda, then, is those things that ought to be accomplished. Grammatically speaking, it's a gerundive (a future passive participle). It looks at what needs to be accomplished at some point in the future but doesn't necessarily describe who needs to do the action (a useful tool for ancient orators).*

# Seek the Deeper Agenda

Understanding and working between the different agenda types helps to ensure your coaching transforms the *person*, instead of only solving the problem. From a coaching perspective, a well-crafted agenda consists of a clarified topic, explored importance, tangible measurement, and a final echo from the coach to ensure they are on the same page as the client. This section looks at the different kinds of agendas, from the larger strategic agenda described in the previous chapter to the deeper agenda that has an impact on your client's agency and other important areas of your client's life.

One of the most common early challenges coaches-in-training must overcome is the tendency to try to solve client's problems. Directly helping a client makes it easy to show the benefit and value of the coaching session, and one of the quickest ways to help is to offer expert advice or a knowledgeable suggestion… but this is a trap. In such scenarios, the client and coach get caught up in trying to find the perfect action plan while unknowingly getting stuck in the problem's agenda. Within the context of a coaching relationship, offering solutions and trying to identify personally with what your client shares can feel frustrating and disempowering for your client.

Effective coaching avoids directly trying to solve the problem by offering advice or possible solutions. Coaching is also not the time to share a story of a similar problem that you have experienced. If a coach focuses only on the goal and action steps, limiting beliefs may operate in the background, making the client feel even worse for not being able to follow through on an action step.

One of your most important coaching roles is to address internal resistance and to use the ideas and emotions the problem brings up to gain insights that lead to lasting, effective change. At times, the biggest change may not be taking a massive action step. Sometimes a subtle shift in perspective can make all the difference.

## What

- **The Strategic Agenda.**

  The strategic agenda is the overarching goal a client wants to achieve through coaching. (It's covered in the previous chapter as part of Design the Alliance.) A skilled coach uses problems, dreams, and goals as the starting point to partner with a client to create effective, long-term objectives. The strategic agenda also offers a foundation for clients and coaches to identify milestones along the journey and to craft agendas for individual coaching sessions using the T.I.M.E. model.

- **The Session Agenda.**

  The session agenda is what your client wants to address in a coaching session. It can start out on a surface level, such as the successful completion of a project, or dive deep by working to identify an empowered perspective on a tough topic. This is the agenda that coaches use at the beginning of the session. The more specific and/or measurable the session agenda is, the more focused and effective the session will be.

- **The Problem's Agenda.**

  Getting caught up in the problem's agenda feels like trying to search for easy, quick solutions. It also shows up when a coach offers advice. This agenda type puts most of the attention on the client's blocks or setbacks. It leads to coaching a client's list of excuses, getting mired in reasons why actions aren't working, and it puts both coach and client on the search for easy, quick action steps to fix the situation.

- **The Deeper Problem's Agenda.**

  Lurking in the background is usually a deeper issue at play that would provide immense value to a client to be able to address and resolve. Whatever its origin, this internal resistance shows up on the client's journey to accomplish meaningful goals. The deeper problem's agenda shows up most clearly in negative internal dialogue, making excuses for ignoring action steps, limiting beliefs, negative assumptions, and/or an inner critic. Any of these things might crop up and keep your client from addressing and taking action on the most meaningful projects in their life. Coaching is excellent at helping clients gain clarity on the influence of limiting beliefs and finding an empowered perspective to outgrow their inner critic.

- **The Deeper Growth Agenda.**

  During the mid-point of a coaching session, or perhaps even earlier, when exploring the importance of accomplishing the session agenda, an idea of a deeper agenda for a client's agency and growth often emerges. A deeper agenda usually addresses an aspect of a client's agency or perspectives on possible pathways that goes beyond the current topic but may influence all areas in a client's life. You know your coaching is reaching expert levels when you can help your clients craft clear and measurable agendas concerning deep personal and professional growth.

# Why

### A. Awareness of the different agendas provides a roadmap and structure to your coaching sessions.

A strong agenda provides a foundation and direction for all the other coaching elements. A strong strategic agenda establishes a clear metric to determine what would make the coaching successful. Those goals provide a strong structure to return to during the coaching journey when a client takes the necessary tangents to explore emotion, thoughts, and behaviors they often don't examine.

### B. Following the T.I.M.E. (Topic, Importance, Measurement, Echo) model keeps the process simple and ensures that you explore openings to deeper agendas.

The T.I.M.E. model is especially crucial while asking about the importance of an agenda or a more meaningful insight or pathway toward an insight appears. The more practice you have with the T.I.M.E. model, the more natural you can make the process feel for your client.

NOTE: It is also possible to switch the order of the T.I.M.E. Model. For instance, ask about the Measurement before asking about the Importance and meaning of the Topic. The order doesn't matter as much as the insights garnered from the process.

### C. Clarifying agendas empowers the client to direct the process of coaching.

Clarifying the agenda also takes the pressure of the coaching direction off the coach so that the coach can focus on listening, trusting that the client will know what would be most useful to look at and what direction to go. Even during a session, asking clients, "What has the biggest insight been for you so far?" and "What do you want to do with that insight?" can reset the session agenda in a way that empowers the client and ensures the session is useful.

### D. Seeking a deeper agenda helps you address a client's agency.

Seeking to understand your client's agency means listening with a curiosity for what it must be like to be your client, as well as seeing the world with the same beliefs about your client's capabilities. You will naturally turn your attention toward coaching the client and use the challenges of the problem to highlight emotions and explore ideas that lead to meaningful and useful insights.

# How

### 1. Lean into the 3 Trusts: Trust Your Client, Trust Yourself, and Trust the Process.

Leaning into the 3 Trusts allows you to coach from an empowering point of view. The difference between a knowledge approach and an empowerment approach has a profound impact on the level of proaction a client takes. Assume your client is on the brink of a major insight. The more you lean into trust, the more a client feels seen, connected, and safe.

### 2. While listening, ask yourself fundamental Learn-Be-Do questions.

Consider using questions that aim for issues at the core of life coaching. For example:

- "Who is the client being?"
- "What perspective is the client taking?"
- "What is most important to the client?"

Once these core issues are addressed, all the other little details (like finding a solution) and needed action steps become inescapably obvious.

### 3. Use the T.I.M.E. Model (Topic, Importance, Meaning, and Echo) to craft strategic agendas and session agendas while also listening for the opportunity to articulate and explore a growth agenda with your client.

An excellent place to explore a possible deeper agenda is in the Importance section of the T.I.M.E. Model of agenda-setting. Exploring the larger meaning and context of a specific agenda helps illuminate the larger learning, perspective, or insight the client can apply to various aspects of their life. An experienced coach learns to trust — and give ample space and time to — the process.

## Example questions to ask to get to deeper growth agendas:

- Who do you need to be in order to achieve your agenda?
- What's the larger element at play in your life that this session agenda represents?
- What is your life asking you to learn in order to be successful?
- Where else in your life do you see a similar pattern?
- What do you need to change in yourself to achieve your agenda?
- What strengths and qualities do you need to harness in order to get what you want?
- What is the impact on your life if you achieve your agenda?
- What is the impact on your life if you do not achieve your agenda?

# Intuition

## What

Intuition is a curious thing. When you listen empathetically for lengthy periods of time, you will pick up on certain insights and surprising emotions, some of which might not fit the context of the conversation. Not only is it important to pay attention to what's being said, oftentimes, it is paying attention to what's *not* being said that can spark your intuition. The skill of intuition is trusting these hunches and effectively sharing them with your client. An important aspect of intuition is sharing in a way that truly serves your client and does not merely demonstrate how clever or insightful you are as a coach. Intuition plays an important role in a coaching conversation because it expands both coach and client beyond rational, logical thinking. Intuition often opens new paths for the coach and client to travel. Here are the elements of intuition as a life coaching tool:

- **Insight.**

  The skill of intuition is based on the coach having an insight, which sometimes may not make logical sense. It could be an idea that just pops into the coach's head or an emotion the coach feels that doesn't quite fit the narrative. Sometimes intuition feels like a whisper. Other times, an intuitive hit is so loud the coach would have to work hard to ignore it. You can trust yourself - especially if you are listening in Level 2 - and feel the extra nudge of curiosity.

- **Sharing.**

  Your intuition only serves the client if you share it. At times, it is useful to preface your intuitive thought. Other times, just jump right in. You can trust the coaching relationship and the process.

- **Release.**

  The most important part of the skill is to release attachment to whether or not your intuition is correct. Even if your hunch is not correct and your client bluntly tells you that the idea doesn't even remotely apply to them, you have still moved the coaching conversation forward. If your intuition is off the mark, you might have created more value because you have modeled boldness and risk-taking.

- **Curiosity.**

  Whether your intuition is right on the money or way off base, shifting back to empathetic listening is crucial. Marveling in the magic of your intuition will not serve your client, nor will wallowing in how wrong your intuitive hit might have been. Thinking about how right or wrong your intuition was pulls you into Level 1 listening because you are making it about yourself. Get back on that Level 2 listening horse and put all your attention on your client. Then, ask them a curious question.

# Why

### A. Coaching is free from sticking to strict logic.

Exercising intuition frees both the coach and the client from the necessity to be logical or rational. Life does not always make sense, so why should every coaching question be based on rational thought or logic?

### B. Intuition can quickly change direction and add depth to a coaching session.

Intuition can be a powerful catalyst for a new line of thought to explore. Creating new paths to follow and insights to pursue provides value to your client.

### C. Sharing intuition demonstrates courage.

Sharing an idea can sometimes feel like a risk. Sometimes your intuition does not fit. In such cases, you have an opportunity to demonstrate elegant failure. If you fail, yet recover without blinking an eye, you implicitly give your client permission to take greater risks in the coaching process.

# How

1. **Begin by actively listening to your client, and allow your mind to recognize thoughts that might not seem logical.**

2. **Ask yourself if this insight may serve your client or add value to the coaching session.**

3. **Share the idea with your client, and release all expectations of being correct.**

4. **Ask your client to make it their own insight or dismiss it. You can ask questions like:**
   - I have this idea that [fill in the blank] may be helpful in some way. What do you think about [fill in the blank]?
   - If you were to apply [fill in the blank] to yourself, how would you change it to fit perfectly?
   - What about this makes sense to you?
   - What do you like about it?
   - What do you not like about it?

5. **Remember to listen empathetically and stay curious.**

   Listen for the next most interesting aspect of what your client is saying, and put all of your attention on your client (not on how awesome or not your intuition was). Even if your intuition was slightly off, clients will likely understand enough to pick up the thread of the idea and make it their own.

# Clearing

## What

Sometimes a client shows up to a session upset about something that just happened. It could be something small, but being upset makes it challenging to focus on what is really important to your client. Some common examples: getting a speeding ticket, finding out about an unexpected bill, or having an argument with a spouse. Clearing is the skill of allowing your client the opportunity to vent the emotion with the intention of getting it out of the way to focus on something else. Clearing consists of these five components:

- **Recognition that something is in the way.**

  It is often obvious when the client has something in the way. A coach practicing Level 2 listening can easily tell if the client seems distracted or annoyed by something.

- **Intention to clear.**

  It is important that the client has a chance to vent feelings of frustration or emotions with the intention to get it out of the way and focus on something else. If the client does not have the intention to move on to what is important, clearing turns into complaining, and there is a danger of the client seeing themself as powerless in the situation.

- **Permission to let it all out.**

  The coach and the client quickly design the clearing exercise, with the coach underlining that the client has permission to let out the emotion or frustration. The goal is to get it out in the open, then out of the way.

- **Time limit.**

  Setting a time limit on clearing helps provide a structure and understanding that there is a definite beginning point and endpoint. In other words, the client has to get down to the "Bottom Line" and get it out of the way by the end of the predetermined time limit.

- **Coach as witness.**

  The coach's role is to listen empathetically and with the understanding that the client just needs to get something out in order to focus on something else. If something more profound does come up, the coach can follow up with powerful questions. However, the coach's main role is simply to listen and then trust that the client will be prepared to move on to more important work.

# Why

Sometimes a client just has to let something out, and having a trained coach witness their emotions and frustrations is a tremendous help. Clearing is effective for the following reasons:

### A. Strengthens the alliance between the client and coach.

Quickly designing the clearing exercise between a coach and client is an opportunity to remind both of the Designed Alliance and successfully complete the exercise with focused intention. Quickly designing parameters of clearing offers both the coach and the client the opportunity to revisit the Designed Alliance.

### B. Gets stuff out of the way.

Clearing is effective for helping a client recognize what is in the way and move it aside. It is a great skill to have in your back pocket, especially because the understanding is that whatever is in the way does not necessarily need to have an intense focus or solution.

### C. Sets a time limit.

The time limit emphasizes the idea that this is something that will eventually end. It empowers the client with the ability to be aware that after venting within the time limit, the focus will shift to something else. It gives the client tremendous self-awareness, allows control over emotions, and provides the ability to decide where the client ultimately wants to focus.

# How

1. **Recognize that there is something your client needs to clear.**

   It is usually obvious, but sometimes there seems to be something nagging in the back of your client's mind. Trust your intuition, and ask about it as a first step.

2. **Briefly explain the exercise of clearing, and invite your client to fully express whatever emotion comes up.**

   You can even encourage your client to over-express emotions with the intention of fully releasing them after they've been expressed.

3. **Begin designing the exercise by setting a time limit.**

   Make sure your client knows that your role is simply to witness and listen empathetically. The time limit is usually no more than two minutes.

4. **Encourage your client to dig into the exercise.**

   Listen to your client vent emotions and frustration, but keep an eye on the clock. Avoid interrupting, chiming in with feedback, or asking questions during the allotted clearing time. This time is just for your client to get it all off their mind and for the coach to simply listen.

5. **After the time is up, ask your client powerful questions, or give them permission to focus on something completely different.**

   Your coaching follow-up questions will make it obvious if your client has really cleared what they wanted to get off their chest. If your client wants to keep going, you can keep going on another clearing session, or you can ask questions about clearing, such as, "What do you hope to achieve through more clearing?"

# 4: Client's Being

## *Chapter Overview*

*This chapter addresses coaching concepts, exercises, and tools for asking questions about your client's character strengths, personality traits, habitual assumptions, and agency. Typically, questions about a client's Being are the toughest to find because they are unusual. However, coaching relies on clients being able to enter a space of self-reflection. It requires that they gain insights that not only address their current problems, but dive deeper into the personality habits that are having an impact on all areas of their life.*

## *Essential Coach Qualities Covered*

*Curious, Courageous, Confident*

## *Skill-Check Questions*

*What are strategies for asking questions about a client's Being?*
*How can I use Core Motivation as a tool during coaching sessions?*

# Exploring Character and Mindset

From a life coaching perspective, a client's Being refers to a client's identities, personality, characteristics, mood, energy levels, values, and thought patterns. The value of life coaching comes from raising your client's awareness about these aspects and asking apt questions designed to explore their assumptions.

In terms of Hope Theory, Being is directly addressed in someone's agency, current skill set, and beliefs about what's possible. In addition, someone's sense of self also becomes apparent by the kinds of goals they choose to pursue. Asking for the reason behind goals and their achievement is an excellent place to explore with a client. Staying curious about how these goals influence the way clients see themselves helps clients move to deeper levels of self-understanding that can impact on all areas of a client's life.

This chapter explores how the theory of growth versus fixed mindset shows up in an exploration of a client's Being. It continues with an overview of Acknowledgment and concludes with how to use a personality assessment as a starting point to inform powerful coaching questions.

## What

- **Your client as a character in their own story.**

  Narrative therapy offers a powerful perspective in raising awareness of one's Being and provides areas to explore and questions to consider. It invites you to imagine that you are the main actor in a movie that mimics your life. Then it asks the question: If you were directing this movie, what aspects of your life would you change? From this perspective, the opportunities for meaningful exploration are endless. For example, let's consider a few more questions:

  - What characteristics of the main character delight you?
  - What characteristics are you waiting for them to discover?
  - What characteristic would you want them to have less of or lose completely?
  - What would you want the main character to achieve? Who would they need to be to achieve it?

- **Implicit Self-Theories: Growth and Fixed Mindsets.**

  **Self-Theories:** Life coaching excels at helping people raise awareness of their character traits. It also helps build awareness of the assumptions about oneself and others that impact all areas of someone's life. Something as simple as addressing a limiting belief about a certain skill set might make a profound difference in the way someone sees themselves and the actions they choose to take. A prime example of an assumption that is not often made mindfully is the difference between a growth mindset and a fixed mindset.[44] Carol Dweck pioneered work that looked at how beliefs about one's intelligence and agency greatly impact the quality of motivation and goals someone pursues. She coined the terms "growth mindset" and "fixed mindset" to draw a distinction between two different worldviews.[45]

  **Fixed Mindset:** This worldview assumes that intelligence and skill are fixed or predetermined. In other words, someone either "has it" or they don't. This mindset leads to performance-oriented goals that showcase one's inherent abilities and generate judgments of praise from others. With a fixed mindset, success is defined by demonstrating talent, which is shown in the results. Challenges are viewed negatively and are seen as a threat to one's core identity. Since success is deeply tied to one's core identity, failure is experienced as a reflection of not being enough.

  **Growth Mindset:** Those who embody this worldview assume that intelligence and skill are malleable and limitless. In other words, with enough hard work and dedication, you can achieve anything. People with a growth mindset develop learning-oriented goals and actively seek out challenges, which they use to develop new skills incrementally. Since success is usually a product of the process of hard work, the hard work itself is their litmus test for well-being. They see failure as an opportunity for learning and tend to problem-solve when met with setbacks. This helps them map pathways for generating the knowledge or skill required for a given task.

  The HOW section explores these concepts from the perspective of a life coach. It addresses ways to utilize an awareness of the growth vs. fixed mindset as a way to craft curious questions that lead to meaningful insights.

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[44] Dweck, C.S. and E.L. Leggett. 1988. A Social-Cognitive Approach to Motivation and Personality. Psychological Review 95(2): pp. 256-273.

[45] Dweck, C.S. 1999. Self Theories: Their role in motivation, personality, and development. Psychology Press. New York, NY.

| *Fixed Mindset* | *Growth Mindset* |
|---|---|
| Believes intelligence & talent is static | Believes intelligence and talent can be developed |
| Desires to look smart | Desires to learn |
| Avoids challenges | Embraces challenges as an opportunity to grow |
| Gives up easily | Persists in the face of setbacks |
| Sees effort as fruitless or something you do when you are not good enough | Sees effort as the path to mastery |
| Ignores useful negative feedback & criticism | Learns from feedback & criticism |
| Feels threatened by the success of others | Finds lessons and inspiration in the success of others |
| May plateau early and achieve less than their full potential | Reaches ever-higher levels of achievement |

- **Coaching Strategy, Tools, and Exercises.**

  In any coaching exercise, you can always ask questions about a client's perception of their strengths, weaknesses, traits, raw talent, effort, and identity. There are a few exercises that are especially useful in helping address those aspects of your client's agency, as well as the meaning and importance of their goals. For example, helping clients craft metaphors is a great way to capture the essence of who your client wants to be and the energy they want to emphasize. Acknowledgment is another good example of a tool that can help your client become more self-aware and fully understand their impact.

# Why

### A. Raising awareness is a powerful tool.

Attending to the client's Being is so effective because it helps the client gain clarity about personal characteristics in order to emphasize action that needs to be taken. Knowing if you are successful due to or in spite of a character trait is not always straightforward. When a coach focuses awareness on who the client is being, the coach helps the client understand that Being goes deeper than the actions they take. When a client slows down the normal pace of life during a coaching session, they are able to address who they want to be directly.

### B. Self-theories run deep.

How we orient toward goals is everything. It is the springboard from which we can ask clients critical questions about whether they are focused on outcomes or processes.

Growth mindset has become one of the practical cornerstones of applied positive psychology. The authors explain how feelings of helplessness and mastery can dictate the way we live our lives. It has everything to do with the types of goals we formulate and links directly to Hope Theory. Paying attention to Being is rare, yet it is often the piece of the puzzle that allows everything else to fall into place.

### C. Increased clarity leads to deeper fulfillment.

Too often, a client looks for fulfillment outside themself or wishes the situation was different. Of course, being motivated to make things different is one of the primary drivers for a client to achieve goals and take action. Yet having a strong sense of awareness is powerful in helping the client appreciate the present moment and the process of achieving a goal. This makes it easier to slip into intrinsic motivation. Addressing the Being links a sense of purpose to the client's actions.

# How

The following is a list of three suggested coaching strategies and exercises that can help you craft questions about a client's Being. This chapter continues with a look at Acknowledgment as a coaching tool, as well as Core Motivation, a tool to be used as a starting point to spark insights that lead to a client's deeper understanding of themselves.

1. **Address Being through powerful questions.**

   When you are stuck on how to incorporate and build self-awareness for your client, asking direct, powerful questions about who your client was, is, or wants to be helps create self-awareness. Such questions also serve to deepen awareness of what your client is learning about themself and the action they need to take. Most goals concentrate on what a client wants to accomplish or obtain (the Doing). Those are useful goals, but turning attention to *who* the client wants to become (the Being) adds a deeper level of meaning to their life. The following kinds of questions point to client's Being:

   - What characteristics do you have that you most admire?
   - In accomplishing your goal, who do you want to be?
   - Who do you need to be to accomplish this goal?
   - What does being a good [fill in the blank] mean to you?
   - When you are at your best, what characteristics do you naturally display?
   - What do you think people most admire about you?
   - What about yourself do you fear?
   - In your mind, what kind of person is capable of accomplishing this goal?

2. **Take on the perspective that your client is both the author and main character of their story.**

   When you think about your client as a character in a story, what would you be curious to learn about the character's development? It's helpful to keep in mind that this approach has its roots in narrative therapy. Get curious about all aspects of their story, from the script to the soundtrack. When you look at a person's character and articulate things like their hopes, dreams, flaws, and strengths, you naturally address a client's Being.

3. **Ask your client to consider how growth and fixed mindsets apply to them or to the project/goal at hand.**

   Asking about the different aspects of growth and fixed mindset is another structure that you can use to craft questions explicitly tailored to your client. The insights and understanding you bring are powerful, especially when combined with empathetic listening and other coaching skills. One example is sharing the fixed and growth mindset chart that describes the differences between the two mindsets. Then, ask clients how their mindset applies to certain assumptions and goals.

# Acknowledgment

## What

Acknowledgment is when a coach addresses the characteristics or qualities the client drew upon to make something happen, move forward, or grow. It is speaking directly to who the client is and a client's agency. Acknowledgment can be used as a means of articulating what you see as a coach so that your client can become more self-aware and understand their impact more fully. It is pointing out the Being of the client, a characteristic that makes a difference.

Acknowledgment differs from a compliment in that a compliment often simply addresses an action the client has taken, or the Doing. A compliment, although welcome, usually just skims the surface, while an acknowledgment is a pause in the recognition of something deeper and more permanent. The following are the essential elements of an acknowledgment:

- **Highlights characteristics.**

  Acknowledgment looks at the specific characteristics of who the client is and the strengths of those characteristics.

- **Heartfelt.**

  Acknowledgment has a beautiful impact on your client. It communicates connection and caring.

- **Short.**

  Acknowledgments don't need to be long to be effective. Sometimes the shortest acknowledgments are the most powerful.

## Why

A. **Points to a deeper truth.**

   Acknowledgment works so well because it points to something deeper than just the action that the client took. With acknowledgment, the coach addresses who the client needed to be in order to take that action. Addressing the deeper truth adds power to the coach-client relationship and encourages the client to look more deeply and fully at themself and what they are capable of accomplishing.

### B. It points to Being.

Part of what makes acknowledgment so powerful is that it speaks to the core of a client's characteristics. A coach can point out a positive aspect of a client's personality and draw it out with clarity. It needs to be used carefully, which is one of the reasons acknowledgment is so effective.

### C. Coach has mirror effect.

Clients are sometimes so stuck in the details and the facts of what is in front of them that it is a challenge to see the deeper truth of who they are. Part of the value that the coach delivers is the ability to be a mirror and to communicate directly and genuinely what the coach sees.

## How

Acknowledgment relies on the coach’s ability to remain grounded and listen for the qualities behind their client’s success. The client may describe a story or a particular success or accomplishment, and the coach can speak to the inner qualities required to achieve that success.

1. **While your client is discussing their specific story or success, listen for the deeper qualities and identify who your client had to be in order to be successful or achieve that accomplishment.**

2. **Tell your client the specific characteristics you see in them, especially those that were required for the achievement.**

3. **Notice the impact that you have on your client.**

   Follow the acknowledgment with a powerful question.

# Core Motivation

From a coaching perspective, personality assessments can be used as a starting point to generate meaningful insights. While personality assessments are fantastic tools, some clients might feel placed in a box or labeled by their results. Approaching personality assessment from the perspective of a growth mindset is a great way to avoid this pitfall.

The Core Motivation tool is based on the Enneagram, a concept that has been traced to Babylonian or Middle Eastern Oral tradition (2500 BCE). The research on the Enneagram is slim, as there are several theories related to the concept. However, one of the biggest reasons it's been adopted by the coaching community is that it allows for growth and change, and doesn't shy away from the idea that some people consider themselves several different Enneagram types[46]. The key with using any personality tool is self-awareness, and the Enneagram provides a starting point for clients to assess the strengths and weaknesses of their personalities.

CTEDU adapted the Core Motivation tool from the Enneagram to raise a client's self-awareness and create insights and opportunities for coaching. The tool focuses on challenging situations to describe characteristics of personality.[47]

It is an excellent tool to use in introductory interviews or when working with groups on leadership and communication.[48] While it may be tempting for clients to identify the "right" style, this isn't nearly as important as the exploration that takes place while using the tool. The tool offers coaches an effective map for addressing a client's Being and core perspectives on life.

Extremely important to the success of this tool is the mindset that personality is a collection of thought and emotion habits. Like any habit, a pattern of personality can be deeply ingrained and challenging to change. Yet, like all habits, creating change *is* possible, sometimes even easy, with increased self-awareness and knowledge of how habits work.

Another important point is the flexibility of the core motivation typing tool, which allows clients to be more than one type, and acknowledges that we all have aspects of each type within us. By avoiding a dualistic approach to personality — having one characteristic means having less of

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[46] Riso, D. R., & Hudson, R. (1996). Personality types: Using the enneagram for self-discovery. Houghton Mifflin.

[47] Bland, Andrew. (2010). The Enneagram: A Review of the Empirical and Transformational Literature. Journal of Humanistic Counseling, Education and Development. 49. 16-31.

[48] Matise, Miles. (2007) The enneagram: An innovative approach, Journal of Professional Counseling: Practice, Theory & Research, 35:1, 38-58.

another — clients can capture the complexities of their unique personality. Someone can be strongly a One and strongly a Seven at the same time.

Approaching the Core Motivation tools with these three points in mind — emphasis on Being, personality as a bundle of habits, and complex flexibility — the coach's job is to raise awareness, explore with the client, then empower the client to take the lead with the tool.

# What

- **Nine core types.**

  Core Motivation is based on a motivation system that includes nine iconic personality types based on the Enneagram. Each of these personality types has unique characteristics. Of course, a nine-type personality system cannot capture the complexity of human experience, but the tool works to increase awareness of different aspects of a personality. There is no such thing as a good or bad, right or wrong type. The point is to provide opportunities to explore ideas and insights generated by the tool.

- **Description of strengths.**

  Each type has specific strengths commonly associated with it. From a strengths-based coaching perspective, it is advantageous to build on and cultivate these strengths.

- **Description of weaknesses.**

  The Core Motivation tool is both descriptive and prescriptive. It describes each personality's common blind spots and weaknesses. Sometimes, such raised awareness is enough for clients to make effective changes. However, the tool goes one step further. It also prescribes actions and gives suggestions on things that can lead to personal growth. Understanding their weaknesses and using the guidance offered by the tool can help them recalibrate their personality. It can help them exercise more informed choices about which perspectives to adopt and actions to take.

# Why

### A. Increased awareness empowers the client.

A personality system presents the challenge of putting the coach in the role of expert. Empowering the client through partnership, curiosity, and asking permission keeps the coach and the client on equal footing. The point of Core Motivation is to empower the client with self-awareness and knowledge.

### B. The tool speeds up the exploration of character traits.

It usually takes a client less than five minutes to find which one or two types best describe themself. Such speed makes the Core Motivation tool powerful, and when combined with curious coaching questions, sometimes those insights gained in five minutes will last a lifetime.

### C. Addressing aspects of personalty focuses on Being.

Another challenge of life coaching is addressing a client's Being. Using Core Motivation helps specifically pinpoint characteristics a client might embody. Core Motivation provides a framework to help a client focus on various aspects of their personality. Sometimes a perspective or personality aspect matches very closely to a client's perception of themself that is taken for granted or is challenging to describe. Core Motivation helps a client gain a different perspective. It makes changing personality characteristics less personal and thus easier to accomplish.

# How

### 1. Emphasize that Core Motivation is a starting point to gain insights and that clients can pick and choose different aspects of different types to make the descriptions fit them completely.

The purpose is not to try to fit the client into the descriptions of each type but rather to find those parts of the descriptions that fit the client.

2. **Ask your client to read the descriptions, marking which paragraph or two fits best.**

   If no paragraphs seem to fit, that's ok. You can ask your client to take bits and pieces from several different types to craft their own description. If a paragraph seems to fit except for one or two sentences, that's ok too. The main purpose is to direct clients to consider different aspects of their personality and character.

3. **Use elements in the paragraphs or Core Motivation charts as a starting point for curious questions. For example, if your client identifies with portions of Type Two, a Helper, you could ask:**

   - How do you balance extending yourself to help others with having time and energy for yourself?
   - What are your thoughts about the importance of being recognized and thanked when you go above and beyond to help someone?
   - What makes it easy for you to identify the help others need most? How would you apply that same skill to yourself?

4. **Ask your client how they want to use this tool for self-growth.**

   The key in working from a life coaching perspective with any personality assessment — from Core Motivation to discovering strengths — is to empower your client with the direction they want to take the tool. If it is working for your client, great; keep using it. If it feels forced or difficult, you can move to a different tool. After reading through the descriptions, you might ask your client what they are curious about their own lives. You might also ask them how they want to make the tool their own. Either of these invitations allows your client to partner with you to determine the coaching direction.

5. **Take the insights gained from the tool to design action that ties back into your client’s original agenda.**

   Tying the tool back to the session agenda or the strategic agenda provides a solid foundation for using a tool like Core Motivation.

In addition, you can also use the Core Motivation tool throughout your coaching program. It is presented as early as possible in the coaching process so you can blend its insights into any of the other exercises and tools that follow. You can come back and reference the tool at any point in time, asking your client what additional insights they have gained after having (hopefully) taken those action steps to cultivate personality strengths and address weaknesses.

# The Core Motivation Paragraphs

## Type One: The Perfectionist

I strive for things to be perfect and in place. If I am passionate about something, I work really hard and spend a lot of time on it. I want other things around me to be perfect, but I am mostly hard on myself. I am very critical of the things I do, and I am very disappointed in myself when I make a mistake. I often have a lot of priorities on my plate, but I just want to improve my life and the lives of others. Often, people follow my lead, and I am comfortable in that leadership capacity. Whatever I have to do, it has to be done right, and I will do what it takes to get there. Others might say I am intense or too serious at times, but I just like to be focused, and I would rather relax when the work is done.

## Type Two: The Helper

What really drives me is my ability to help others. I love doing things for somebody, especially if I know they will appreciate it. I feel like I know how best to help people because it is usually easy for me to determine their wants and needs. It might seem like I try too hard or am controlling at times, but it is just because I want to help. I get satisfaction from putting others before myself, though sometimes it takes its toll when I do not focus on my own needs. I like when others recognize that I am there for them, and I usually have a difficult time saying no. I also place a huge emphasis on relationships. I give a lot of myself in hopes that others will recognize what I have given, and in turn, will respect me for that. At the end of the day, I hope that the people I help will be there for me when necessary.

## Type Three: The Doer

I want to be the best I can be at what I do. Goals are important to me, and I work hard at achieving them. I feel very successful when I meet my goals, and I want others to respect me for it. My mind works rather quickly, and sometimes I can get irritable if something or someone seems to be working too slowly. Though I am personally competitive, I can also do well on a team and am well-liked. I want to make a good impression on people, and I care about how others view me. When I have a really passionate goal, I know just what to do to achieve it and stay motivated. I prefer to do only the things I am good at.

## Type Four: The Artist

I like to express my emotions, and I want others to understand me for who I am. I consider myself genuine and unique. I am constantly seeking more my life, and I try to evaluate and consider what is missing. I do not like to be misunderstood. Sometimes people might mistake me for being dramatic or caring too much, but really I just want to express exactly how I feel. I like to get to know others on a deeper level and form real connections. I am passionate about feelings, and I want to reveal myself to others accurately.

## Type Five: The Thinker

I love being the expert. Before I delve into something, I want to know as much as I can. I do not like to be wrong or corrected, which is why if I do not know something, I would rather not say it. I am happy to argue my points for what I believe is right, but if the facts do not support my idea, I will reconsider my idea. I often thrive on alone time, and I like to think about my past experiences. I am pretty independent, and I do not want to have to rely or depend on someone else. I crave information and knowledge. I am not shy in a group setting, where I can speak up and say what I know and express what I want. Overall, I am a simple person, and my life is rather straightforward.

## Type Six: The Friend

I like to be prepared for the worst. Often I envision worst-case scenarios so that I know just what to do in case they actually happen. I have a creative imagination and a somewhat odd sense of humor. I can be unsure of people in authority, especially if I do not trust them. Once I trust someone and have explored an idea, I will be very loyal. When it comes to new ideas, the first thing that usually comes to mind is what could go wrong. I would rather think it through before accepting it at face value. I am not much of a follower, especially when it comes to ideas, because I can easily pick out why I disagree with it.

## Type Seven: The Optimist

I enjoy life at a fast pace. I like to create many options for myself and my future plans. I keep many options open. I shy away from negative emotion, and I hate feeling bored or trapped in my life. If I am upset over something, I do not want to dwell on it. Sometimes I will get really excited over something rather quickly, but eventually, I will get bored with it and forget about it or drop it. Often, I will start things that do not quite get finished. At the same time, I am very optimistic, and I believe life is a ride that is meant to be enjoyed. When I have several options that I can choose from, I have a hard time deciding because I want them all.

## Type Eight: The Defender

I like to be in control as much as possible. I am very blunt and honest because I want things to be clear. It frustrates me when I feel like someone is conniving or unfair. At times, I might seem controlling, but I just want to take charge and keep things going smoothly. I try to hide my weaknesses because I feel vulnerable when someone else knows what they are. That being said, I think we should still recognize our shortcomings and do something about them. I would rather get something done on my own than be told what to do, which is why I sometimes have a hard time following orders from authority. I will not always respect a person of authority upfront, but when I do, I am much more willing to follow directions from them.

## Type Nine: The Peacemaker

I like things to be peaceful and happy. I tend to avoid conflict and confrontation. Sometimes I cannot even recognize exactly what I want, so I just go with the flow, especially in group settings. When I do know what I want, I might still agree with someone even if it goes against that. I might get angry at myself, but I do not like getting angry at other people or when people are angry at each other. I have a kind heart, and I know it can be taken advantage of. When I really need to, I know how to stand up for myself. I am good at seeing multiple sides to a situation, both pros and cons.

# Basic Desires, Fears, and Internal Message

| # | *Main Desire* | *Basic Fear, What I Avoid* | *I'm OK when* |
|---|---|---|---|
| *1* | To be perfect | Being bad or flawed, mistakes, losing control | I do what is right |
| *2* | To be loved | Being unwanted, disappointing others | I can help others |
| *3* | To be the best | Being useless, failing, looking bad | I am recognized for achievement |
| *4* | To be unique | Being forgotten, being rejected, being fake | I express my true nature |
| *5* | To be right | Being wrong, strong feelings, demands on my time or energy | I am the expert |
| *6* | To be safe | Being threatened, being helpless, feeling useless | I avoid danger |
| *7* | To be happy | Being trapped in pain, unclarity, boredom | I get what I want |
| *8* | To be in control | Being weak and vulnerable, feeling controlled | I am strong |
| *9* | To be comfortable | Being in conflict, tension, being outside comfort zones | I am peaceful |

# Strengths and Leadership

| # | *Typical Strengths* | *Leadership Style* |
|---|---|---|
| *1* | Principled. Eager to improve. Responsible. Will work to get things done right. Loyalty. | When I allow myself to have fun. When I accept myself and the situation as perfect just as it is. |
| *2* | Compassion. Helpfulness. Charming. Knowing how to help others. Sympathetic. | When I don't depend on others thanking or recognizing me. Focus on action that is also beneficial to myself, as well as others. |
| *3* | Successful and a high achievement ability. Team player. Charming. Calm under pressure. | When I allow myself to focus on fulfillment. When I can set aside a desire to look good for the sake of accomplishing a meaningful goal. |
| *4* | Creativity. Artistic. Romantic imagination. In tune with emotion. | When I embrace the ordinary and work to make it exceptional. When I focus on principles, not getting sidetracked by emotions. |
| *5* | Scholarship. Thoughtfulness. Patience. Reliability. Creativity and an ability to craft useful systems. Calm under pressure. | When I take action and connect with people. Have the ability to think deeply about problems to create lasting solutions. |
| *6* | Wit. Perseverance. Loyalty. Strong analytic mind. Humor. Responsibility. | When I act on positive assumptions. I'm magnetic when I focus on positive goals and view problems as challenges and opportunities. |
| *7* | Vision. Excitement. Fun. Love to think up new ideas and connections. Entertaining and Charming. | When I am willing to face negative situations and emotions. Focused and willing to do the necessary hard, grinding work. |
| *8* | Decisive. Strong. Can get the job done. Fair. When in the service of others, can become heroic. | When I am aware of my impact. When I take other people's needs and feelings into account. |
| *9* | Ability to create peace. Maintain harmony in groups. Inclusive. Understanding. Accepting. Caring. | When I have a clearly defined goal. Excited to step outside my comfort zone and take meaningful action. |

# Personal Growth

| # | *Typical Challenges* | *Suggested Exercises* |
|---|---|---|
| *1* | Being too hard on myself. Being too serious. Not taking time for myself for fun. Demanding perfection. | Improvisation. Accept, even embrace mistakes. Take time out of the day for fun and laughter. |
| *2* | Doing so much for others that I forget to take care of my needs. Becoming demanding when I am not recognized. | Create boundaries. Set aside time to treat yourself as you would another person. |
| *3* | Believing my worth is in what I accomplish. Sacrificing personal relationships for the sake of a goal. | Relax your focus on success and put your focus on what would fulfill you. Clarify your values and what's really important. |
| *4* | Over-identifying with emotion, especially sad emotion, without moving into action. Feeling unworthy. Too much self-focus. | Practice changing perspectives and choosing perspectives that empower you to get what you really want. |
| *5* | Over-analyzing and being stubborn. Avoiding people or opportunities that seem too overwhelming. Not moving into action. | Short meditation during the day to check in with your emotions. Then move into action! You must act on what you decide. |
| *6* | Not trusting yourself or others. Thinking about worst-case scenarios. Wanting to keep knowing more before making a decision. | Check in with fear. Practice mindfully embracing positive perspectives. Positive affirmations. |
| *7* | Thinking that the grass is greener somewhere else. Constantly trying to avoid pain and not meeting responsibilities. | Clarify a mission statement and take small action steps to accomplish it. Meditate. Exercise discipline. |
| *8* | Being stubborn. Denying weakness and sensitivity. Fighting any attempt to be controlled and trying to control others. | Focus on the gift that you can give to others. Listen closely to others and practice empathy. Resist being stubborn. |
| *9* | Ignoring problems. Not meeting problems when they first start and avoiding conflict at any cost. Not knowing what you really want. | Clarify a mission statement. Take action. Be assertive before you get angry. |

# 5: Client's Learning

## *Chapter Overview*

*Asking questions that address what a client is learning about themselves — or what they hope to learn about themselves — is a natural way to look at a client's agency and mine for meaningful insights.*

*It's helpful to have a handful of default coaching questions to use when working with clients, such as, "What are you learning about yourself?" Or "What do you hope to learn about yourself?" This chapter goes into detail about the theory and structure of asking questions that address a client's deeper learning, assessment tools designed to raise awareness, and inquiry as a coaching tool.*

## *Essential Coach Qualities Covered*

*Curious, Courageous, Confident*

## *Skill-Check Questions*

*What are strategies for asking questions about a client's Learning?*
*How can I use assessment wheels as a tool during coaching sessions?*
*When would I use inquiry as a tool?*

# Meaningful Learning

The client's Learning is the insight a client has about themselves, the situation, and what's possible. The coaching process excels in leading clients to meaningful breakthroughs that translate to better decisions and more effective action steps. Such a process works best when a coach is attuned to the client's personal and professional (or academic) growth, and trusts that the client is naturally resourceful. In terms of Hope Theory, a client's Learning applies to the assumptions, ideas, and emotion tied up in the client's agency. In other words, Learning equates to the knowledge and capability the client develops to follow different pathways. Someone with a high degree of hope trusts in their current skill sets and their ability to gain new insights and knowledge to accomplish meaningful goals.

In the rush of everyday life, most people do not take time to reflect on or seek out insights, especially with the help of a certified life coach. They are locked into a constant state of trying to perform at their best or stress about obtaining the right results. While stress can be beneficial when balanced with engaged focus and energy, many people overemphasize performance and results, locking them into a constant state of stress. A coach's job is to help a client relax, broaden their perspective, and help them build their agency to open more pathways.

In essence, exploring Learning mimics the growth described by Barbara Fredrickson in her Broaden and Build theory of positive emotion.[49] Fredrickson posits that positive emotion is not simply the absence of negative emotion, but a state that allows for optimum learning, similar to play. While feeling good, engaged, and relaxed, sharp focus decreases slightly, but creativity and energy increase. Clients enter a learning zone that creates new insights, perspectives, and skills to achieve increasingly challenging goals.[50] A coach creates this learning zone by providing a space for clients to step into their vulnerability, learn more about themselves, and use that learning to design effective action steps.

This chapter focuses on the elements and coaching strategies that help facilitate a client's Learning.

[49] Fredrickson, Barbara & Branigan, Christine. (2005). Positive Emotions Broaden the Scope of Attention and Thought-action Repertoires. Cognition & emotion. 19. 313-332.

[50] Fredrickson, Barbara & Losada, Marcial. (2005). The Positive Affect and the Complex Dynamics of Human Flourishing. The American psychologist. 60. 678-86. 10.1037/0003-066X.60.7.678.

# What

- **The three aspects of meaningful Learning.**

  In looking at Learning from a long-range, bird's-eye view, these are the three elements of a meaningful insight. These elements are similar to Ken Robinson's definition of creativity, which is the combination of the novelty of an idea with its usefulness and connection to what already exists.[51]

  1. **Concept.** Learning happens when a client becomes aware of an idea, emotion, or other piece of information they need to know more about. The concept itself is the first part of learning. When people think about learning, most people think solely about the concept. A concept could be anything from developing a new procedure at work to incorporating more awe into their life.
  2. **Context.** Learning happens when a concept is placed within a larger context. In life coaching, the client's life is the context in which all other learning takes place. Being mindful — and curious — about aspects of the context can offer useful areas to explore in a coaching session. For example, you might ask questions such as:
     - How will developing this procedure impact your life?
     - What aspects of your life will change if you incorporate more awe into your daily routine?
  3. **Importance.** The last piece of Learning is the meaning and importance that a client becomes aware of when learning a new idea, emotion, or piece of information. Asking about meaning helps solidify the learning and often brings the insight even deeper.

- **Balance between learning and performance zones.**

  It's possible for both a learning zone and performance zone to happen at the same time, but it's rare. More common is to find a balance point between the two. By bringing attention to the balance point, you offer clients a chance to mindfully design how they spend time in each zone between coaching sessions.

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[51] Robinson, Ken. "Rethinking Creativity". Out of Our Minds. Hoboken, NJ: Capstone, 2011. 22–23.

- **Performance Zone.** In a performance zone, the emphasis is on achieving the best results based on what you already know. Performance zones feel more intense and hight stakes because they rely heavily on the final outcome. This increased pressure can sometimes be beneficial as it is often motivates people to put in maximum effort over a short period of time. However, this short burst of maximum effort comes at a cost. First, people often spend more time in performance zones, resulting in a need for recovery to sustain performance. Lack of recovery leads to fatigue and burnout, which has become a problem over the past few decades. The second cost is learning. Staying in a performance zone forfeits the opportunity to learn from one's mistakes or try out new approaches and skillsets. In a performance zone, the focus is always on results.

- **Learning Zone.** In a learning zone, the emphasis is on identifying what we *don't* know and creating pathways to obtain the new knowledge. Learning zones are exploratory and low-risk, allowing clients to play with new concepts and ideas in a safer environment. Learning zones encourage reflection (something that happens naturally in coaching sessions), practice, and tracking mistakes. By combining these three components, clients will focus more readily on the goal of improvement rather than the goal of perfection. By doing so, they actually get themselves closer to perfection in the process. Reflection, practice, and mistakes are all ways for clients to receive feedback, then identify ways to apply that feedback the next time they step into the performance zone.

- **Attention to current — and future — agency.**

  Coaching for a client's learning looks at insights about the present as well as intentions for the future. In Hope Theory, agency covers both your client's current characteristics, skill sets, and abilities and the perspectives and assumptions your client currently makes about who they are and what they are capable of achieving. It is essentially the answer to the questions, "Who are you?" and "What are you learning about yourself?" As a coach, you could also turn attention to the future by asking, "What do you hope to learn about yourself?" Exploring agency becomes an opportunity to ask questions that both explore a client's Being and Learning in ways that produce immense value.

- **A name for the insight.**

  Crafting a name for the insight acts like the handle of a neatly-packed bag for clients to be able to pick up the idea and unpack it quickly in the future. These names become part of a client's personal vocabulary, making them easier to recall when needed. Additionally, the process of crafting a name sometimes deepens learning and provides more clarity.

# Why

### A. Learning is intrinsically motivating.

The human brain is designed to learn, and learning feels good. Being intrinsically motivated is a wonderful form of sustainable, long-term motivation. It is a way for clients to move forward. Learning about themselves and the world around them helps clients stay motivated. It also creates excitement about being alive and the possibilities that lie ahead.

### B. Learning fosters growth.

Growth adds a richness to life. When a client is not growing, there is a dullness or listlessness to their experiences. Learning is so powerful because it allows the client to continue reaching new levels, and to continue growing and stretching in new directions.

### C. Deep insights increase hope and open pathways and possibilities.

Such growth and new directions help clients tap into positive perspectives, which opens up possibilities for more learning and effective action.

### D. Gives action another dimension.

In a coaching session, the coach and the client will often create action lists. If a coach also checks in with what the client is learning, the coach helps the client add another dimension to the action. The actions become a way for the client to explore and gain more self-awareness and knowledge of their world.

# How

1. **Step into a mindset of being the student of your client.**

   From this perspective you can ask questions about the context, meaning, and importance of an insights. One of the best ways people learn is through the opportunity to share an idea with someone else. If you assume the perspective of being your client's student, you can ask questions that allow your client to lead you through the steps or elements of the insight.

2. **Lean into empathetic listening. Remain curious about what the client is learning.**

   Trust that a solution to the client's challenge will happen naturally. Watch for opportunities to become curious about insights your client is having about themselves, their agency, possible pathways, emotion, etc. When you listen with curious empathy to what your client is learning during their exploration, you will find many openings and opportunities to ask deep, meaningful questions.

3. **Have a few default learning questions ready to go in your coaching toolbox.**

   You can ask questions about Learning at almost any time during a coaching session, and it will create value. The following are helpful questions to have in your toolbox to build from and tailor to your client:

   - What are you learning about yourself?
   - What are you learning about the situation?
   - What do you need to learn in order to accomplish what you want?
   - In what other areas of your life can this learning be applied?
   - What did you learn in today's session?
   - What has your Future Self learned that you have yet to learn?

### 4. Once a client hits upon an idea or insight, it's often helpful for you to draw attention to the process your client just went through to identify that insight.

Bringing attention to the present moment is a powerful tool that adds value to the coaching process. When clients find an empowering perspective — or learning zone — on a coaching call, it's useful to bring attention to the present moment and the process that the client just went through to reach that perspective. Being aware of the ideas, emotion, or assumptions your client had to release is often just as important as the new insight.

### 5. Name the process. Name the insight.

Names don't have to be overly complicated. They could be a simple adjective or a short phrase, such as 'entering learning zone' or 'empowered soundtrack.'

### 6. Co-create action steps to test the insight, or explore additional ideas when the insight is applied to other areas of a client's life.

After naming the insight, it usually feels like a natural pivot point to designing an action step. You could ask something like, "What's an action step that would test this insight?"

Or you could continue the exploration by asking your client what other areas in their life they want to explore, or what happens when they apply this insight to those other areas.

# Inquiry

## What

- **Powerful question to ponder.**

  An inquiry is a question designed for the client to ponder. In the context of a coaching session, a coach may leave the client with a powerful question to consider between the end of the current session and the beginning of the next.

- **Useful conclusion.**

  Inquiries are especially useful to quickly conclude a coaching session. For example, imagine you have another appointment coming up in a few minutes, yet the topic and coaching conversation is going really well with no real conclusion in sight. Creating a powerful question for your client to ponder for the next week is a beautiful tool to add value while concluding a session.

- **Many answers.**

  The question is designed to lead to several different insights and several possible answers, depending on circumstances and perspectives. A delightful way to start the next session is with your client answering the previous session's inquiry.

## Sample Inquiry Questions:

- At what point in this situation do you trust and release control?
- When working, what distracts you?
- What keeps you focused?
- What do you really want out of this experience?
- Who do you have to be in order to be effective?
- What would being your best self look like this week?

# Why

**A. Relies on client's strength.**

Inquiries are effective because they rely on the client's natural strength to come up with the answers to a question. As a coach, inquiries are best if they are short, open-ended, and designed to help a client approach a situation from many different points of view.

**B. Addresses who the client is Being.**

Inquiries are also useful because they address the client's core beliefs and motivations. Inquiries are often more about who the client is rather than what the client does. Coaching is so effective because the coach looks at both Being and Doing, while reinforcing client learning. The best inquiries include all three: Being, Learning, and Doing.

# How

1. **First, recognize that your client may benefit from asking themself a question between now and the next session.**

2. **Share that sometimes it's beneficial to keep exploring the topic between sessions, rather than having an action item, and ask your client if they would like to do that.**

3. **Pose two to three powerful questions as a starting point for developing an inquiry.**

   Ask your client which question they would like to tweak to make their own for further reflection.

4. **Alternatively, you can also ask your client what question they would like to explore further between now and when you meet next.**

   This option is useful when you have an established coaching relationship and the client has had practice with experiencing powerful questions.

5. **Determine with your client how often they would like to ask themselves the inquiry question between now and the next time you meet.**

   Ask how your client will remember to consider the inquiry.

6. **Design how you want to follow up with the inquiry at the next session.**

# Assessment Wheels

Assessment wheels are simple tools designed to give a client an overview of their life—whether just one aspect or in more broad terms. These wheels are meant to help clients take a snapshot of their lives 'as-is' to help identify potential issues or roadblocks that are in the way of achieving their more ideal goals. This snapshot often helps clients become more aware of the core values that are either missing or lacking in their life[52]. With this awareness, clients can easily identify the disconnect between the current 'as-is' state and the core value they'd like to develop or bolster.

For example, the *Wheel of Life*, one of the most popular assessment wheels, has categories that cover the most common meaningful areas of a person's life. No matter what categories you want to create for your assessment wheel, you are helping your client explore different parts of their life which may have otherwise gone neglected.

## What

When you start to look at an area that has been neglected, you might be tempted to ask your client about specific action steps they can take to improve that area. Avoid the temptation to jump into action questions when using an assessment wheel. The first aim of the wheel is simply to bring a curious mindfulness to your client's life. Here are the elements common to any assessment wheel:

- **Diagram of a wheel with wedges.**

  Each diagram includes a circle, divided into the appropriate number of wedges. Around each wedge is a label that describes an area of a client's life.

- **Different areas of life.**

  Each assessment wheel looks at different aspects of the client's life. The *Wheel of Life* deals with various aspects of one's life that span from career to family to personal growth.

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[52] McIntosh, S. (2003). Work-Life Balance: How Life Coaching Can Help. Business Information Review, 20(4), 181–189. doi:10.1177/0266382103204003

- **Rating current level of satisfaction.**

  The coach asks the client to rate, on a scale of one to ten, their current level of satisfaction with each area of life.

- **Follow-up.**

  Usually a coach will follow up with powerful questions and well-designed actions.

## The Classic Wheel of Life

The *Wheel of Life* is a standard life coaching exercise that helps the client develop a snapshot of different areas of their life. It invites clients to explore how satisfaction in one area of life may be connected with another.

- **Career.**

  Overall experience with the state of the client's professional experience, including their choice in profession, their specific role and responsibilities, their opportunity for growth and advancement, and their relationships with co-workers.

- **Money.**

  How happy (or unhappy) the client is with their financial situation. It could be an assessment on happiness with savings, debt, income, expenses, thoughts and beliefs about money, and money habits.

- **Family.**

  The client's overall satisfaction in their relationships with immediate family. The client may break this wedge into two (immediate, as in the home, and extended, as in parents/siblings).

- **Significant Other/Best Friend.**

  The client's satisfaction level with their current relationship, romantic or platonic. If the client is single, how satisfied the client is with being single. Or how happy are they with their best friend.

- **Friends.**

  How satisfied is the client with their friendships? This includes what they give to those friendships, as well as what they receive from the friendships.

- **Community.**

  For community, start by having the client define what community means to them. Then, have them rate how connected they feel to that definition of community.

- **Fun.**

  How satisfied is the client with the amount of fun and/or relaxation they are experiencing? How much time are they making for fun and relaxation?

- **Health.**

  How healthy the client feels, including exercise and diet. This wedge can also be divided into physical health and mental health.

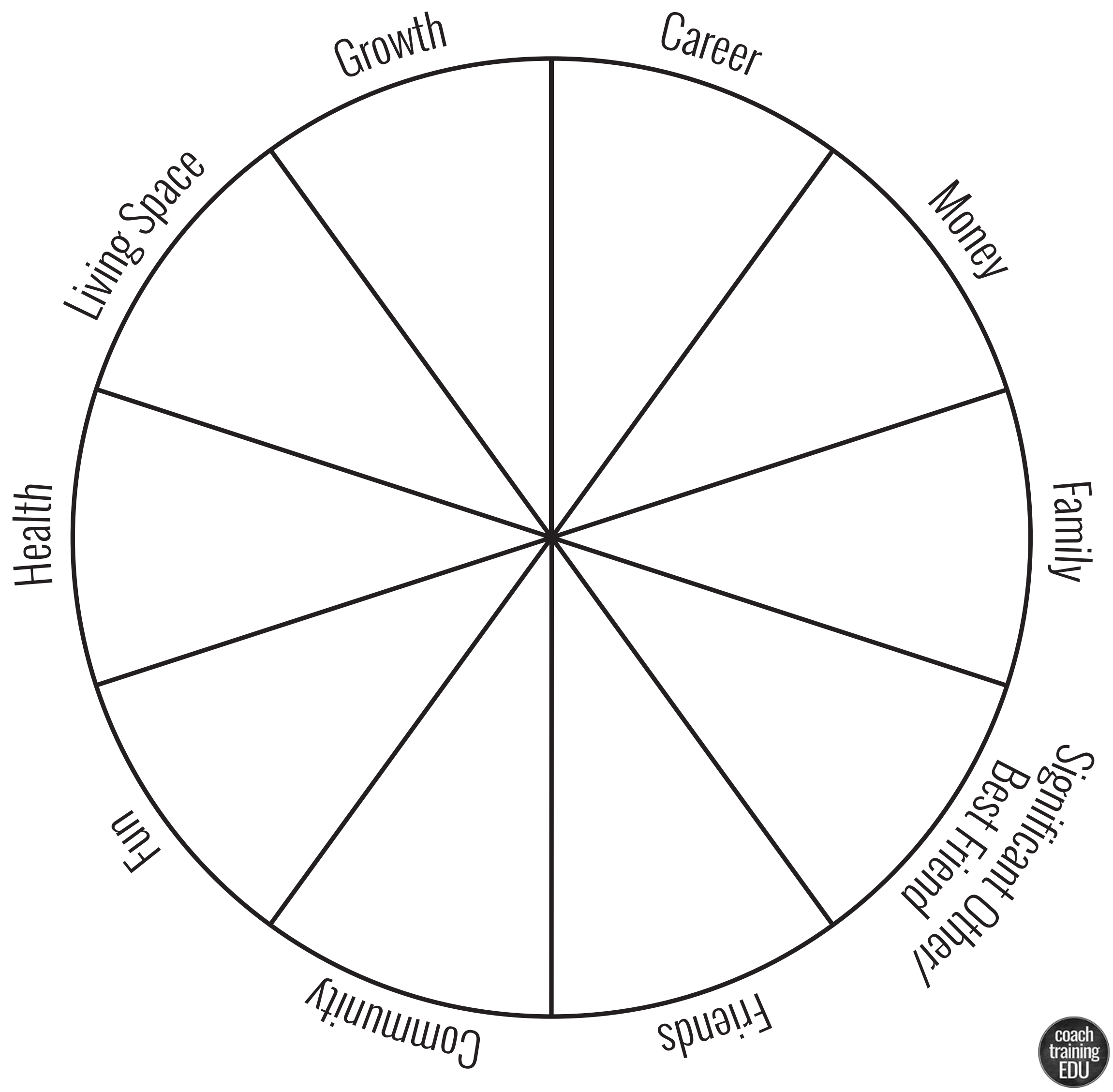
- **Living Space.**

  Satisfaction level with their actual house, apartment, or dorm. Or it could also be their general level of organization.

- **Growth.**

  What kind of growth is occurring? If none, why? If there is some, what kind? How does it feel?

# The Classic Wheel of Life



# How

1. **Introduce the concept of the Wheel.**

   Explain how it's useful to look at your client's life in defined parts. It helps us see the connections and address any areas they may be neglecting.

2. **Help your client create the Wheel.**

   Determine which assessment wheel you are going to use, and which categories, if any, you'd change to fit your client.

3. **Draw a circle or use a copy of the diagram included in this training guide.**

   If you are having your client draw the wheel, have them divide the circle into pieces.

4. **Ask your client to rate their current level of satisfaction for each area on a scale of one to ten, with ten being the most satisfied.**

5. **Ask your client powerful questions, such as:**

   - Looking at your wheel, what is most interesting to you?
   - What are you learning about yourself as you explore the balance of these areas?
   - What is the common thread between these two sections?

6. **In the discussion following the creation of the Wheel, make sure to emphasize that the client is simply trying to increase their level of satisfaction just one notch higher.**

   One of the biggest assets of any assessment wheel is to help clients think of incremental improvement, rather than trying to go for a 10 or nothing.

7. **Co-create one or two possible actions to take from this exercise, and co-create your client's coaching homework for the session.**

   For example, you could work with your client to design how they want to be with their stress level, what actions they want to design, what they want to become more aware of in their stress level and response, and what they want to focus on for next week.

8. **Save and date the wheels.**

   It is a great exercise to look back and see that the action you take from doing this exercise really makes a difference in your life over the long-run. So often, successes can get buried in the details of living, so that we forget how reality looked and felt even three months ago. Consider this an exercise to make sure your client's life is balanced, a kick in the pants to get them moving, and a tool to remind your client how far they have come.

**Notes:** After your client fills out their Wheel, be careful not to automatically ask what the lowest number is. In doing so, you may be setting the agenda for your client to automatically look at what is causing dissatisfaction. Instead, if you ask, "What jumps out at you?" there may be some surprising insight that is revealed, regardless of if the number is low, high, or somewhere in between. Often, a lot can be learned when clients take the time to see what is going well.

# 6: Client's Action

### *Chapter Overview*

*Action is where an idea becomes tangible. Designing effective action steps is at the core of coaching's value to a client. This section builds on the previous two chapters to look at the elements of co-creating action steps with a client. The design of these three chapters mimics an ideal coaching session, where insights about Learning and Being lead naturally to inspiring and effective action steps.*

### *Essential Coach Qualities Covered*

*Courageous, Confident, Inspiring*

### *Skill-Check Questions*

*What are strategies for asking questions about a client's action?*
*What are the elements of a well-designed action?*
*When would I use brainstorming as a tool?*

# Well-Designed Actions

Clear and concise goals comprise one of the main elements of Hope Theory. Goals are the endpoint for pathways; they give clients a way to assess agency.[53] They are also necessary elements in theories about Flow and human flourishing.[54] Whether implied or written down with excruciating clarity, goals are a ubiquitous part of daily life. And many studies show that setting goals increases productivity, happiness, and your sense of accomplishment, while being a sign of solid mental and emotional health.[55]

At its best, goal-focused coaching crafts goals that help clients grow personally and professionally and leads clients to take meaningful action that yields important insights. However, designing goals without considering the Learning or Being of a client can often feel lacking and cause frustration for both the client and the coach. Such an approach tends to devolve into problem-solving, solution hunting, and unsolicited advice.

In order to avoid the trap of problem-solving, it's useful to let the strength of the insights generated during exploration lead naturally into designing action. Indeed, Coach Training EDU's life coach training program uses the term *well-designed actions* instead of *goals* to help coaches and clients avoid common traps, such as results-focused reflection or favoring quick solutions over exploration and insight.

Ideally, a client comes to a coaching session with a clear goal in mind. For example, let's imagine a client coming to a coaching session wanting to succeed in a specific project in the next three weeks. The timeline, clarity, and importance of the project make it easy to start with the goal and work backward. The client can work toward crafting a series of logical action steps that will lead to success. However, such approaches rarely work because human nature is not always logical. Along the way, internal and external setbacks will crop up, and these distractions will demand attention. Instead of trying first to create perfect goals, an experienced coach takes the time to explore a client's perspectives, empowering and limiting beliefs, assumptions about agency, facets of identity and personality characteristics, and other areas of a client's life before trying to design goals. With a foundation of meaningful insights gained from such an exploration, action steps that also include important insights and new pathways emerge naturally.

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[53] Snyder, C. R. 2002. "Hope Theory: Rainbows in the Mind." *Psychological Inquiry*, vol. 13, no. 4, pp. 249–275.

[54] Csikszentmihalyi, Mihaly. 1990. *Flow: The Psychology of Optimal Experience.* New York: Harper & Row.

[55] Locke, E. A., Shaw, K. N., Saari, L. M., & Latham, G. P. 1981. Goal setting and task performance: 1969–1980. *Psychological Bulletin, 90*(1), 125–152.

When the force of an insight leads to a curiosity about action steps, or even better, makes the next action step inescapably obvious, it’s time to shift into action-crafting mode. It’s at such a point that your training in goals and well-designed action crafting becomes indispensable. The following section explores the different aspects of goals as a way to help you craft curious coaching questions. It continues by focusing on some key ingredients to help clients create well-designed actions. We'll conclude with a series of suggested steps to take to wrap up coaching sessions with well-designed actions that include meaningful insights and agreements about accountability.

# What

A well-designed action starts with a broad goal, such as “I want to be successful in this project,” and creates more depth and clarity, such as “I want to get into a writing flow state for one hour or longer each day.” By exploring different facets of a goal and including insights gained during a coaching session, a coach has the opportunity to help clients create effective, meaningful action plans.

While there are many different aspects of goals, crafting a well-designed action picks four elements to focus the process of turning a goal into an effective action plan. These are the four elements of a well-designed action:

- **Stated in the positive.**

  Instead of “I want to stop procrastinating,” the well-designed action would be “I want to start my most meaningful work by 6:30 a.m.” The idea is to shift away from reactive motivation (avoiding what one doesn’t want) to proactive motivation (going after what one does want).

- **Is 100% within the control of the client.**

  This requirement helps clients create process goals, which are more likely to include elements of learning, growth mindset, and insights from coaching sessions. For example, “I want to get positive feedback on my project” becomes “I want to use an empowered perspective while writing for an hour a day.” While wanting positive feedback is understandable, it doesn't focus on the process or the present moment. It puts the focus out further in the future and on something that is not entirely within your client's control.

- **Is just the right size.**

  The idea is to design actions that are challenging enough to be exciting, but not too large to be unwieldy. This aspect helps clients gain more clarity on the structure, complexity, and timeline of their plan.

- **Is specific and measurable.**

  Being able to measure success creates a deeper sense of motivation. While measuring something invisible (like an empowered perspective) can be challenging, it's important to explore what might make the progress tangible. It helps clients further clarify and revisit the complexity of the systems needed to be successful. Measurability also makes accountability possible, which is a critical aspect of an effective coach-client relationship.

# Why

A. **The process of turning a goal into a well-designed action offers opportunity for deep learning, insights, and increased creativity.**

We think about goals so often that it almost seems habitual, yet we often don't explore how and why we don't achieve those goals. Often, people tend to overestimate what they can achieve in a day and look for ways to mitigate feeling unworthy. Working with a coach helps clients see and release limiting beliefs. It's incredibly energizing to become increasingly aware of one’s usual way of thinking about goals and action plans. And it's empowering to explore ideas of agency, perspectives, and assumptions that one wants to carry into action.

B. **An effective, well-designed action balances results and process-based goals.**

It helps balance extrinsic outcome goals ("I want to be successful") with a focus on the steps and effort it takes to complete the action. Focusing on the process helps clients build self-confidence and increase momentum through a series of small successes.

### C. Releasing worry about elements one cannot control frees more energy to be creative and focused on the work at hand.

Many goals create more stress because they involve a final outcome that falls outside our control. When it feels like so many elements are left to chance, having specific action steps that are completely within one's control is empowering. It adds a clarity and an opportunity for clients to focus on the present moment while doing deep work that matters. This process will most likely become a successful pathway to achieving spectacular outcomes.

### D. Finding a balance between the size and complexity of a goal with the necessary skillset and timeline can spark motivation.

Often, the goals we make are huge: get the promotion, run a marathon, buy a first house, send kids to college, achieve retirement, etc. These are great goals, but they are also long-term goals, making them too big for a well-designed action. A well-designed action takes a larger goal (like running a marathon) identifies exciting milestones for that goal, and breaks down the larger goal into manageable steps.

## How

### 1. Let the insights gained from the coaching session lead to designing the action step.

Be mindful of jumping into action steps too soon in the session. Moving too quickly to action steps means that you may be coaching the problem, not the client. When a coach is designing actions with the client toward the beginning of the session, it is usually an indicator that you have not dug deep enough into the Being or Learning of the client, and you are focusing too much on the Doing.

### 2. Pivot seamlessly to action steps when it seems like exploring action will deepen insights.

When you get the sense that asking questions about what action steps or plans would test the strength of an insight or lead to a greater understanding of agency, it's time to address action. You can shift the coaching session to action using questions such as:

- Looking at everything we covered, what action step comes to mind? What action step would test this insight?

- What would be an exciting step for you to take between now and next session? How do you want to apply this insight to action?
- What's the next specific milestone? What step would make this idea tangible?

3. **Use other coaching techniques while designing actions, such as Brainstorming or Busting Limiting Beliefs.**

To help spark creativity and excitement, you can use coaching tools, such as Brainstorming and *Busting Limiting Beliefs,* to encourage your client to consider additional pathways. Landing on the perfectly planned pathway is not as important as clients experiencing the process of crafting effective and exciting well-designed actions. Having the ability to get back into a creative, hopeful space while developing plans can turn into a powerful habit for a client.

4. **Explore the elements of goals and well-designed actions to raise awareness and deepen insights.**

Use your knowledge of the many different aspects of goals and elements of a well-designed action to inform your curiosity. Ideally, a coach allows their understanding of a concept to inform their curiosity while still tailoring questions to your client's situation. You can use the following questions as they are or as starting points to ask insight-provoking questions about action:

- How complex or simple do you want to design this action?
- How much of this action plan do you completely control?
- What aspects can you control?
- How many variables do you need to consider to be successful?
- What is the simplest measurement of success?
- What's the ideal frequency of the action?
- What would help you focus on the process?
- How does this action step relate to the ideas you have about your innate talent?
- What balance do you want to strike between a learning zone and a performance zone?
- How does measuring progress impact your motivation?

5. **Clarify a well-designed action by going through all four elements.**

   You have likely already addressed most of the four elements by exploring and using some of the questions above. However, it's useful to run through the elements to complete designing an effective action plan.

6. **Bring in the perspective of leadership, if appropriate.**

   When a client takes action, it often impacts more than the client because many well-designed actions involve others and the community. Part of a client's excitement about taking action is its impact on others from a personal leadership perspective.

7. **Make agreements about accountability.**

   The final step is to address how your client wants to be held accountable and agree on what communication between sessions should look like. Often, it's helpful for clients to send a quick message to the coach when following through.

   See the section on Accountability in Chapter Two for a deeper discussion on accountability and its importance to being a professional and effective coach.

8. **When following up on action steps in the next session, it's useful to to think of results as feedback, not judgment.**

   In life coaching, the results from a client's action are a form of feedback that provides valuable information for the client and coach. Without the weight of judgment on success or failure, both the coach and the client can more accurately determine which steps need to be fine-tuned and which can be tossed aside completely.

# Brainstorming

## What

Brainstorming is the process of generating multiple outcomes by creating a list of options and possible actions and developing solutions without judging the usefulness of the ideas. The primary purpose of a life coaching session is to get the client thinking about ideas and options that they might not have previously considered. Research suggests that brainstorming in groups yields a larger volume of unique ideas. In coaching, the coach and client form the group, allowing the client to explore more options than they would have had without the coach[56].

Brainstorming is a way of opening up and discovering more options and opportunities that the client can later explore through actions. Here are the key elements of brainstorming from a coaching perspective:

- **Creativity.**

  Brainstorming is a process of creating new ideas. Often in coaching sessions, coach and client will take turns generating ideas. The fundamental basis of any brainstorm activity is that of creation. It is trusting the imagination and letting it flow. Keep in mind that this exercise is about generating new ideas, not about giving the client advice.

- **Absence of judgment; safety to create.**

  For any brainstorming session to be fruitful, it is essential to release judgment and not censor new ideas. This is a crucial component because generating ideas only happens in an atmosphere of comfort and safety.

[56] Simone M. Ritter & Nel M. Mostert (2018). "How to facilitate a brainstorming session: the effect of idea generation techniques and of group brainstorm after individual brainstorm", Creative Industries Journal, 11:3, 263-277, DOI: 10.1080/17510694.2018.1523662. https://www.tandfonline.com/doi/full/10.1080/17510694.2018.1523662

- **Momentum.**

  Flow and momentum are created when coach and client go back and forth in the creation process. That rhythm sets a pace and helps both parties refrain from judging the ideas.

- **Excitement.**

  Brainstorming is fun and creates excitement. This excitement helps move the process forward and aids in momentum.

- **A list.**

  The end result of a successful brainstorming session is a list of opportunities, ideas, and actions your client can take. This does not mean that the list is inclusive of all of the ideas generated by coach and client. However, it does form a foundation for the client to design an action based on the newly-created list.

# Why

### A. Safety is created when judgment is placed aside.

Generally speaking, when ideas are created, there are two steps: the creation of the idea and the judgment of that idea. Those two actions usually occur simultaneously, and sometimes clients even judge the idea before they say it. The client's internal editor or Inner Critic may be harsh and judge the idea before it is spoken. This does not allow for the free flow of creation. It is crucial for coach and client to approach the creative process intentionally and set aside final judgment of an idea when looking to develop creative solutions and options. This is what makes brainstorming so effective.

### B. Practice stretches the creativity muscle.

Successful brainstorming stretches that creative muscle. Idea generating, like any mental or physical skill, gets stronger when exercised. It's a skill that gets better with practice.

### C. Building on each others' ideas strengthens the coach-client relationship.

Accepting and sharing ideas generates trust between the coach and client, increasing a sense of safety. Such safety strengthens the coach-client relationship and encourages the client to try out new ideas and share even more deeply.

### D. It naturally adopts a positive mindset of possibility.

The simple act of brainstorming puts both the coach and the client in the mindset that all of these ideas and actions are possible. The power of a positive mindset is that it helps clients identify the assumptions they are making. It also helps them discover the many resources they have available, aligning their action with positive assumptions.

## How

1. **Recognize good opportunities to brainstorm creative solutions.**

   As a coach, you understand the different perspectives that your client can use. Know that when you are starting a brainstorming session, you are automatically tapping into a positive perspective that embraces possibilities.

2. **Ask your client if they want to brainstorm some possible actions, perspectives, values, or structures.**

3. **Explain to your client that the process of delaying judgment aids the creative process and urge them to refrain from editing or judging themself.**

4. **Briefly design with your client how they want to proceed with the brainstorming.**

   Most often, coach and client will take turns coming up with ideas. Sometimes the client will get on a roll and throw out several ideas in a row. Sometimes a coach will start with two or three ideas before the client gets warmed up.

5. **Suggest ideas you feel may be useful, but be willing to let go of any ideas that the client does not take to.**

6. **Start creating ideas.**

   Pay attention to the pace and the tendency to judge the idea as soon as it comes up. As a coach, you can also short-circuit the judgment instinct by generating crazy ideas and keeping the momentum light and free from the Inner Critic. Demonstrating the free flow of ideas — even if they are silly — will help the client join in the spirit of the brainstorm.

7. **Let your client choose the actions, perspectives, structures, or ideas they want to move forward with, and follow up by creating well-designed actions.**

# 7: Essential Coach Qualities

### *Chapter Overview*

*This chapter revisits the 7 Essential Coach Qualities first introduced at the beginning of this book. This section goes into further detail about the elements of each quality, includes ideas about how to cultivate each quality, and explains ways to demonstrate them during a coaching session. These qualities act as the standards necessary for coaches to meet in order to become certified life coaches.*

### *Essential Coach Qualities Covered*

*All 7 are covered*

### *Skill-Check Questions*

*What are the 7 Essential Coach Qualities?*
*What are the defining elements of each quality?*
*What are coaching strategies or questions to use to demonstrate each quality in a coaching session?*

# Essential Coach Qualities

Now that the foundation of coaching has been established in the first six chapters, it's time to revisit the Essential Coach Qualities. These qualities are: Professional, Empathetic, Empowering, Curious, Courageous, Confident, and Inspiring.

These are the essential qualities of being an effective, masterful coach. While this book covers many coaching tools that may or may not be used in any one coaching session, a masterful coach demonstrates each of these seven Essential Coach Qualities in each coaching session.

A key element of ensuring that you continually increase your coaching skills is to elicit feedback from your clients and to listen to or watch recordings of your coaching. This section outlines specific skills and questions based on coaching's core competencies to ask yourself as you review your coaching sessions.

# 1. Professional

1. **A coach establishes clear expectations about the coaching process and adheres to high ethical standards.**

   A professional coach establishes clear expectations about coaching and the coaching process with the client and sponsor (such as a parent, university, or organization), if present. Establishing expectations also requires a coach to manage the various roles that a coach may play in a client's life. For example, an executive coach with extensive experience may be called in as a consultant. Professionalism is demonstrated by the coach's ability to define coaching succinctly, set outcomes, and delineate the different roles they might play when working with clients.

2. **A coach maintains confidentiality, respects a client's experience and identity, and knows when to refer clients to other professionals.**

   A professional coach is required to maintain confidentiality and avoid conflicts of interest. In addition, coaches must uphold the ethical standards of boundary-setting, and the referral process, when necessary. This also includes creating clear expectations and agreements with the sponsor, if present.

3. **A coach sets clear outcomes for the overall coaching relationship and effective agendas for each coaching session.**

   Coaches must establish an effective agenda at the beginning of each coaching session to set a strong foundation for the meeting. A professional coach will elicit the agenda from the client as a means to empower them to look proactively at their life and choose their focus area. Asking the client to set the agenda underlines the principle that the client is the expert in their own life. An effective agenda includes exploring a topic (T), the importance of the topic (I), a way to measure the effectiveness of the coaching session (M), and the coach's echo to ensure understanding and clarity of the agenda (E). Together, this creates the T.I.M.E. Model.

4. **A coach designs an alliance with a client to empower the coaching relationship.**

   "Designing the alliance" refers to the coach's ability to directly address various points regarding the coach-client relationship. This includes the client's needs from the coach, the type of feedback to give throughout the sessions, frequency of check-ins, etc. A Designed Alliance is your opportunity to empower your client to make suggestions and give feedback to make their coaching package most meaningful for them. It's also a time for you to ask your client their preferences regarding coaching style, question categories, and accountability.[57]

5. **A coach addresses and co-creates systems to help clients maintain accountability and follow-through on action steps.**

   Managing progress and accountability is a skill that coaches display by combining curious questions with direct communication to ensure the follow-through of the well-designed actions/plan. Helping clients think about accountability and its importance helps boost the chances that they will complete the designed action plan. Accountability makes up a large portion of value for the client.

   ***Additional skill-check questions:***

   - Did the coach address the client's previous accountability early in the session?
   - To what degree does the coach trust the client to follow through on accountabilities?
   - How well does the coach ask for feedback from the client regarding how the coaching session is addressing the client's needs?

   ***Suggested questions to ask:***

   - How did you do with your previous accountability?
   - How can I help hold you accountable to these actions?
   - What version of yourself do you have to be to accomplish this action?
   - What is your relationship to accountability?
   - How easy or hard will it be to follow through on this accountability?
   - What would make it easier to hold yourself accountable?

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[57] See Chapter 2, Design the Alliance, for a more detailed description of the coaching element.

***How this shows up on a coaching assessment:***

- Does the coach ask questions about the value of the coach-client relationship in the larger context of the client's objectives?
- Does the coach ask questions that apply similar insights across various areas of the client's life to provide more value to the client?
- Does the coach help the client develop larger strategic goals and design actions from a long-term perspective?

***Suggested questions to use in coaching sessions addressing the Alliance:***

- What is your long-term strategy?
- What value do you want to get from this coach-client relationship? How does that relate to your larger objectives?
- What adjustments do I need to make to ensure that you're getting what you need from coaching?

# 2. Empathetic

1. **A coach listens actively to clients, seeking to understand them within the context of their lives and to create a safe space for clients to share freely.**

   Empathetic listening is the core skill of coaching. It's what a coach *does* each minute of every session. It's a proactive activity, requiring the coach to actively imagine what it is like to be the client in the client's life, both in what the client is currently describing as well as right now, in this session. Such a stance in listening takes trusting your imagination, intuition, and natural curiosity to help you arrive at the next powerful question or direction for the coaching session.

2. **A coach generates questions from the client's perspective, asking questions designed to elicit insights.**

   When you listen from such a perspective, it makes sense to ask questions from your client's viewpoint. The first way a coach demonstrates this skill is by avoiding questions that are designed to get information. Instead, a coach should ask questions designed to elicit insight. Information-based questions might look at what has worked in the past, or gather information that someone would need in order to make a recommendation (for example, a weekly schedule of current activities). Insight-based questions focus on what the client might not yet have considered. For example:

   *"What is it like to say that out loud?"*

   *"What do you hope to learn about yourself in the next week?"*

   *"What do you want to say to yourself two months from now?"*

3. **A coach recognizes subtle shifts of energy, as well as patterns and themes in a client's life.**

   The other way this skill shows up is in the degree to which a coach recognizes small shifts in a client's perspective, energy, or emotion. When you listen from an empathetic perspective for extended lengths of time, you start to recognize changes and shifts in your client that even your client may not notice, or quickly dismisses. By bringing awareness to the present moment and the shifts that happen, you help your client become more mindful and raise awareness of certain patterns that are useful to address.

Listening closely makes clients feel seen and heard, and it creates a strong bond between a coach and a client. This kind of relationship creates a safe space for clients to dig deep and explore areas that are hard to navigate successfully solo. Empathetic listening and the recognition of small shifts adds depth, which provides value through coaching.

***Additional skill-check questions:***

- Did the coach listen for opportunities to ask questions beyond just fixing or addressing the problem?
- Did the coach ask the question based on listening between the lines?

***Suggested coaching questions:***

- Although you're not directly saying it, it seems to me that this is also really important to you?
- What's the relationship between what you're saying now and what you said a few minutes ago?
- It seems that your energy shifted just now. What happened?

# 3. Empowering

1. **One of the best uses of a coaching exercise is to offer an insightful starting point or a scaffold to ask powerful questions that move a client forward.**

   This quality looks at how well you are able to balance expert knowledge and coaching exercises with fully empowering the client to determine the topic and direction of the coaching. A coach looks for opportunities to ask questions from the perspective of being a student of your client. To meet this coaching standard, after you share expert information, it's best to shift immediately into empowerment mode to ask your client what they want to do with the information. If your client chooses to ignore or go against it, it's your job to follow them. If they choose to adopt and use it, that's great too, and it's your job to shift back into complete curiosity mode. One of the trickiest parts of coaching is to find the synergy between providing expert knowledge and leaning into empowerment coaching.

2. **A coach tailors coaching exercises and tools to fit the client.**

   The second way this concept shows up is in the way you adapt to fit your client's language and paradigm. Over-explaining coaching tools or reading questions from a list makes coaching sessions feel flat. It misses the opportunity to connect meaningfully with your client. Clients want to feel seen and heard. An expert coach seamlessly melds the structure of a coaching exercise with what the client just said. The whole conversation feels so natural that someone listening in might think that two people are having an amazing conversation, without realizing all of the coaching tools, exercises, and skills happening in the background.

   ***How this shows up on a coaching assessment:***

   - Did the coach ask short, open-ended questions?
   - Did the questions the coach asked lead to new insights for the client?
   - Were the questions primarily present- or future-tense-oriented?
   - How well did the coach choose an exercise to work with a client?
   - How well did the coach adapt the exercise to the client with apt questions?

# 4. Curious

1. **A coach asks powerful questions designed to elicit a deeper awareness; explore a client's current assumptions, ideas, and emotions; and look toward the future.**

   Curiosity comes from the Latin word *cura*, which means *to care, ask about.* Combined with listening empathetically from the client's perspective, curiosity is a way of deeply caring for someone else. Listening and asking questions is a gift that allows a client to explore more of themselves and what is truly most important in their lives. Curiosity shows up more clearly in the structure and topics of the questions a coach asks. The most effective structure is termed a "powerful question". Powerful questions are short (ten words or fewer), and start with open-ended question words such as *What*, *Why*, and *How*. The other aspect of powerful questions is the quality and range of a coach's curiosity to include a balance of Learning, Being, and Doing questions, covering both a client's agency and possible pathways.[58]

2. **A coach continues to ask meaningful questions that help clients go beyond current understanding, transforming judgment into curiosity and helping clients clarify and define new insights and ideas.**

   This skill shows up most clearly when the coach elicits deeper ideas and emotions by simply staying curious. When a coach stays in curiosity, keeps asking questions, and finds a deeper agenda for the client, they set clients on a journey with a completely new territory of thought and emotion. The probability of stumbling upon new and meaningful insights skyrockets. One such opportunity is at the beginning of each coaching session when setting the session agenda. When exploring the importance of a surface agenda, there is often an opportunity to look at another, more fundamental agenda that would have an impact on the current challenge, as well as on many other areas in a client's life. A skilled coach is able to listen for opportunities to ask questions that change a client's perspective or perhaps uncover and challenge limiting beliefs. The job of the coach is to listen from the perspective of the client to such a degree that the client feels their self-judgment transform into curiosity and progress.

[58] See the introductory chapter for a more detailed description of Powerful Questions.

***Additional skill-check questions:***

- Does the agenda come mostly from the client, or is the coach neglecting to identify the client's agenda or pushing their own?
- After the agenda is clear, does the coach explore and allow the client to dig deeper by making more connections to other areas of a client’s life or the meaning behind the agenda?
- Is the session agenda measurable?
- Does the coach repeat the agenda and confirm the client's agreement on the agenda for extra clarity?

***Suggested coaching questions:***

- What would you like to focus on today?
- What outcome would make the time we have together worthwhile?
- Just to be clear, in this session you would like to focus on [what the client just said] and come away with [two new tools] to use for this next week?

# 5. Courageous

1. **An effective coach is able to create a safe space that invites sharing and boldness.**

   Coaching courage shows up in the coach's comfort with vulnerability and willingness to take risks, ask tough questions, and address the elephant in the room if one is romping around.

2. **A coach is willing to be direct and state their observations, insights, and suggestions without being attached to whether the client agrees with the idea or not.**

   While suggesting solutions for clients is typically not an acceptable practice, there may be times a coach will have ideas or suggestions for their client to ponder. Courage addresses a coach's ability to share these insights with a client from a life coaching perspective. In coaching, this involves sharing your thoughts, followed by a powerful question. This allows the client to remain in control of the session. For example, you might ask, "I think you're avoiding a larger issue. What are your thoughts?" Or, you might say, "I think you really need to take this step. What do you think?" Here, it's important to release attachment to the client's agreement/disagreement with your thought, empowering your client to own their thoughts. If your intuition or idea is off the mark, clients will typically follow up by articulating an adjustment to the idea or suggestion that fits them better. Even when you're wrong, your questions still have the power to evoke insights.

   ***How this shows up on a coaching assessment:***

   - Does the energy in the coaching session feel safe?
   - Does the coaching conversation reflect intimacy and strength in the coach-client relationship?
   - Was the coach bold in asking insightful or risky powerful questions?
   - Did the coach work with the energy present in the coaching conversation?
   - Did the coach interact with the client and the client's energy, rather than stick to a scripted exercise?

# 6. Confident

1. **A professional coach leans into the three trusts in coaching — trust your client, trust yourself, and trust the process — and embraces pausing and silence as useful elements of a coaching session.**

   New coaches often find themselves trying to force new insights, rush through questions, or paraphrase before asking a powerful question. Expert coaches trust the coaching process. Experienced coaches are comfortable with allowing long pauses, sometimes as much as ten to twenty seconds of silence, before asking the next question. This comfort comes from the knowledge that clients likely need more time to process deeply insightful coaching questions. The silence is a show of respect for the client's need to process more slowly and a sign of trust in a client's ability to do so.

2. **An expert coach trusts the client's resilience and brilliance.**

   An experienced coach understands that a client is resourceful and capable of achieving their goals. The coach's role is not to over-step but to let the client do the heavy lifting to develop their own solutions. More experienced coaches avoid problem-solving, instead focusing on simple, curious questions to derive insights, solutions, and action steps directly from the client's learning. Coach confidence is displayed through the continued exploration of Learning, Being, client agency, client characteristics, and perspectives — not on the development of an immediate action plan. An experienced coach knows that the client's inner exploration will lead to a natural and effective action plan.

   ***Suggested coaching questions:***

   - Out of everything we discussed in the session so far, what action do you want to take?
   - In taking this action next week, what do you hope to learn?
   - How does this action relate to your larger agenda?

# 7. Inspiring

1. **A professional coach inspires clients to take bold action steps and design effective systems.**

   An effective coach guides clients to create exciting action steps that are both manageable and meaningful. This quality shows up most clearly in the strength of the well-designed actions co-designed by the coach and client. A well-designed action includes these elements: positively stated, effective size-to-time ratio, client-controlled success, and tangible measurement of success.

2. **A coach effectively ties action with Learning and Being, addressing both a client's agency and possible pathways.**

   A coach should be able to help the client relate their action steps to their agency (Learning and Being). Creating action steps that go beyond task completion and help them learn more about themselves, the effectiveness of a certain perspective, or how to use tasks to develop more skillsets are deeply meaningful. Action steps that include both action and learning will help bolster bolder action in the future.

3. **A coach co-designs accountability with clients and addresses the strategic and session agendas effectively.**

   Coaches should be adept at identifying the most effective ways for the coach and client to follow up on action during the next coaching session. Designing an Alliance around accountability ties back into the first coaching quality, professional, and completes the coaching core quality loop.

   ***How this shows up on a coaching assessment:***

   - To what degree is the client the main designer of the action?
   - Does the designed action also include developing greater awareness of learning for the client?
   - How well does the designed action relate to the session and deeper agendas?

# 8: Vision

### *Chapter Overview*

*Having a clear, compelling vision makes it easier to find and maintain one's motivation. It provides a benchmark for decision-making.*
*This chapter looks at elements of a compelling vision to help clients create a vision they feel connected to. It also examines coaching exercises that use vision as a tool to spark and maintain meaningful productivity.*

### *Essential Coach Qualities Covered*

*Empathetic, Empowering, Confident*

### *Skill-Check Questions*

*What are the elements of vision from a coaching perspective?*
*What specific aspects of a vision recording make it useful?*

# Vision

## What

Creating vision is a life coaching skill that unlocks the client's ability to imagine an experience in the future. Both coach and client must trust the client's own imagination. Vision is such a central element to life coaching because coaches can help clients clearly see what is possible for them in the future by using their imagination to visualize an ideal future.[59] It is one of the best tools that coaches have. Helping clients use vision in their lives has five components:

- **Imagination.**

  Imagination is central to the vision process. Jumping into a vision for the future is an act of faith that requires trusting the imagination.[60] It uses a series of pointed questions that allow a vision to emerge naturally.

- **Awareness of what is most important.**

  There are no right or wrong answers when it comes to vision and what a client wants in the future. Sometimes it is a challenge for clients to answer questions that have no right or wrong answers. Part of what makes vision so useful is that instead of looking for what is right or wrong, coaches look for what seems to have the most impact and what aligns with the client's values. Vision requires awareness of the client's priorities and focus.[61]

- **The bigger picture.**

  Vision often requires looking at something from a larger point of view and identifying the significance of the action steps that lead to larger goals. Especially if those larger strategic goals have a name, it's useful to reference them in the vision.

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[59] Weinberg, Robert. (2008). Does Imagery Work? Effects on Performance and Mental Skills. Journal of Imagery Research in Sport and Physical Activity. 3.

[60] Cumming, Jennifer & Williams, Sarah. (2012). The Role of Imagery in Performance.

[61] Ungerleider, S., & Golding, J. M. (1991). Mental practice among Olympic athletes. *Perceptual and Motor Skills, 72*(3, Pt 1), 1007–1017.

- **Little details.**

  Vision sometimes requires looking at the minute details of the future and making those little details more visceral.[62] These details can include descriptions of the actions necessary to be successful and evidence that the plan is working.

- **Stamina.**

  Using imagination requires energy and stamina. Especially if the client is not used to tapping into imagination in this way, staying focused on what life will be like in the future can be a challenge. A coach's well-developed stamina and ability to stick with clients for longer periods of time is a vital skill.

# Why

### A. Creating a vision is pragmatic.

People rarely take intentional time out of their busy day to reflect mindfully on what they really want in the future. In a coaching session, clients can leverage time by determining the best action to take and what will lead to fulfillment. This avoids wasting time on things that are not that important, or that will ultimately not lead to the larger vision. So, while taking time to think about a vision does not, on the surface, appear to move a client forward quickly, it is one of the most pragmatic steps to move forward and achieve larger, more significant goals.

### B. Vision increases hope and mitigates delayed gratification.

Creating a vision and adding lots of details, especially to a vision that has a lot of meaning for the client, is a way of making the future vision more real in the face of present circumstances. That hope for the future keeps the client moving forward and helps them cope with delaying gratification. The client learns the value of putting work into their vision; actions become vital to achieving that vision of the future. Vision is a central element to positively and sustainably managing motivation.

[62] Liebermann, Dario G. & Katz, Larry & Sorrentino, Ruth. (2005). Experienced Coaches' Attitudes Towards Science and Technology. International Journal of Computer Science in Sport. 4.

### C. Crafting a new vision can provide perspective on a difficult topic in a client's life.

When using vision, paying attention to a new point of view is powerful for the client. For example, the *Bird's Eye View* perspective (see Session 20) gives the client the opportunity to imagine all of the little details while also looking at the bigger picture. When imagining the *Future Self* (see Session 14), the client creates the perspective looking back from fifteen years in the future.

### D. It takes practice.

Imagination gets better with practice, especially when the client starts by creating a vision for just a few weeks into the future and then takes steps to make the vision happen. The experience can be surreal when they realize that it is possible for the imagined vision to be achieved—they can literally live their dream. Excitement builds as a result of understanding the visioning practice. One experience of a successfully achieved vision will help clients create additional vivid and useful pictures for other things they want in their future.

### E. It highlights potential obstacles.

During the course of creating a vision, clients can identify potential obstacles and create preemptive methods to overcome these obstacles.

### F. It pinpoints needed resources.

In the same way that visioning helps a client become aware of obstacles, it can also help them to understand what resources need to be emphasized, developed, or sought out.

### G. It highlights a specific action and when it needs to happen.

Often, the client feels vertigo when becoming aware of all the steps necessary for something to happen. For example, a client might make the decision to get up early on Tuesday and exercise. But that decision is not made on Tuesday morning. More likely, that decision was made on Monday evening while sitting around. The process can help the client determine specifically when they will follow through. Vision can help the client create a system to make decisions that are based on values.

# How

An important part of the vision process is called *Future Pacing* (See Chapter 18 for insight regarding how to use *Future Pacing* as its own tool). *Future Pacing* is jumping to some point in the future and imagining what that reality will be like. That timeframe could be two weeks, three months, or ten years.

1. **Introduce the idea of creating a vision and a structure, then become clear on the timeframe.**

   Three months is probably the easiest place to start and provides a great structure to remind your client of a well-designed action to take.

2. **Ask your client powerful questions to elicit both the bigger picture view and the meaning behind creating this structure.**

   You can also use the *Wheel of Life* as a starting point, or look at one day in your client's life three months from now.

3. **Now that you have identified some point in the future, pace the reality.**

   Take your client through the steps at the speed it would really be happening, and ask them to imagine what this new reality would be like.

4. **Imagine and capture the little details.**

   Once the timeframe, bigger picture, and reasons are clear, the next step is to flesh out the vision with specifics. Sometimes those details are the most valuable part and make the exercise come to life for your client. Such questions could be about what they would see, hear, or feel once they reach their goal (e.g., What would it be like to walk into that first day of their new dream job?)

5. **Design the structure for your client to be reminded of this vision.**

   Determine how your client wants to capture this vision. Do they want to create a sound recording of what a day in their life will be like? Do they want to create a series of images? How often will your client be reminded of this vision?

6. **Repeat the process.**

   Three months will pass, and your client will have the opportunity to be in the vision's timeframe. Once a client has the experience of living one vision, they can fine-tune the next vision and create a new structure for the next couple of weeks, months, or a year.

# Vision Recording

A client's *Vision Recording* is essentially a tool to focus energy and overcome limiting beliefs. It relies on your client's imagination by asking them to create a vivid vision of what the future could hold. The exercise primes your client for future exercises in the coaching journey. The recording also captures that first vision of what your client wanted to accomplish. Once the goal is accomplished, your client can look back in awe at the power of their imagination and action.

Clients can also opt to create a written version, an illustration, or a collection of pictures that serves the same purpose. You can co-create with your client whatever format works best.

## What

- **Sound recording.**

  A vision recording is a sound recording, usually about three to five minutes long, that records someone's future goals and outcomes, with some music in the background.

- **Specific imagery.**

  The more specific and detailed the *Vision Recording*, the better. Tangible realities, such as holding a job offer letter, or seeing the smile on your first paying client's face, are great specific images that are useful for the recording.

- **Short and simple sentences.**

  It's best not to get too complicated. Simple is good.

- **Present or past tense (not future).**

  Verbs used are in the present or past tense, not the future. When researching the power of mental training and visualization (e.g. how Olympians train), it was often mentioned that the most useful visualizations are spoken in the present tense. It's important to imagine the event *as it's happening*, or looking back at the accomplishment *as if it has already happened*. The technical term is called *Future Pacing*.

- **Importance of emotion.**

  Along with the details and the setting, it is important to get into the emotion of the moment. What does it feel like—or what did it feel like—to have accomplished this?

# Why

**A. Provides motivation toward what clients want.**

The recording reminds clients of what's possible and helps them tap into motivation toward the future that they want.

**B. Boosts the mood.**

Music evokes emotion. There is something deeply emotional about hearing yourself describe your goals set to music. It's an immediate mood booster.

**C. Makes motivation habitual.**

Motivation styles are habitual. Listening to one's vision recording makes changing motivation habits much easier because the mind is constantly reminded of the new scenario your client wants to create.

# How

1. **Introduce the concept of creating a vision recording or another structure, such as a collage or illustration, to help the client move forward consistently and with a strong focus in mind.**

2. **Have clients complete another Wheel of Life.**

   However, instead of going through and rating where they are currently, ask clients to explore each area of the Wheel in turn and ask what would happen (what their life would look like, what emotions they would experience, etc.) if each area was a perfect, or near-perfect, ten.

3. **Ask for tangible details that would happen if important milestones were reached.**

   The more details they include, the more vivid the exercise and recording become. You can ask questions about what your client would see, hold, or hear once something is accomplished.

4. **Ask about the new habits or process your client has also adopted to realize the vision.**

   You can add value to the exercise by helping your client identify steps taken and habits formed, in addition to the goals outlined. Ideally, your client will create a balance of big-picture goals, as well as well-designed actions and habits for the recording.

5. **Plan the next steps of your client making an actual recording using the notes from the coaching session.**

   The notes your client makes in the assessment wheel will serve as the beginning of a script for the recording. While so much value is created by having your client clarify what they want to have on the recording, the next step is to plan action steps to create the actual recording.

6. **Design accountability.**

   Usually, clients want to share their recordings the next time they meet with their coach. It's helpful to design accountability with your clients about how they want to use their recordings.

# Strategic Vision

As an executive coach, you have the opportunity to help clients craft a vision to share with their team that maps out pathways to achieve important goals. In other words, you may have an opportunity to help your client develop a business plan. Several resources — and entire books — are dedicated to crafting solid business plans. One recommended resource is *Business Model Generation*, which has a nine-step process that goes into exacting detail about the different elements of a plan, and the type of business structure someone might establish.[63] Another is *A Beautiful Constraint*, which explores the idea of using obstacles as a way to increase one's agency and to develop different pathways that offer long-term value to others.[64] This section draws from those resources and looks at creating a strategic vision from a life coaching perspective.

# What

- **A Story Wrapped in a Strategic Vision.**

  At the heart of a strategic vision is a story. It's a story about who your client is, what they want to offer, and who is going to benefit. Your client has the opportunity to create a compelling and exciting picture of where they want to be in their career years from now.

  To avoid getting trapped in the fast pace of daily life, the business vision provides a clear picture and reminder of what the client is working toward. Through compelling questions, new insights help clarify new pathways to take and new systems to be developed.

- **Common Aspects of a Business Plan.**

  The business plan is the roadmap that consists of:

  - **Vision:** The first part of any plan is knowing the bigger picture the client wishes to create.

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[63] Osterwalder, Alexander, Yves Pigneur, Tim Clark, and Alan Smith. 2010. *Business model generation: a handbook for visionaries, game changers, and challengers.*

[64] Morgan, Adam. Barden, Mark. 2015. *A Beautiful Constraint: How To Transform Your Limitations Into Advantages, and Why It's Everyone's Business.* John Wiley & Sons.

- **Value Proposition:** This is the expected value the customer receives when you solve their problem or provide them a service.
- **Objectives/Goals:** The plan needs to have specific objectives, goals, or milestones the client is trying to hit.
- **Strategies:** These are the strategies that will help you get to your vision. These could be long-term strategies.
- **Customer Segments:** Who is going to buy the product or service?
- **Customer Relationships:** How does the business relate to the customer?
- **Well-Designed Actions:** These are the specific, concrete, time-based action steps necessary to implement the strategies. These are usually more short-term.
- **Revenue Streams:** The income that results from delivering value.
- **Strategic Resources:** What are the elements needed to deliver value consistently?
- **Reminders & Accountability:** Occasional and intentional check-ins to see if the plan is staying true to the vision. Recommended timeframes could be once a month, once every three months, or once a quarter.
- **Flexibility: This is the f**lexibility to be able to adjust any elements of the business plan.

# Why

## A. Provides inspiration and motivation to keep going.

If the vision and plan is clear, exciting, and energizing, then the client will naturally be more inspired and motivated to keep taking action to make it happen.

## B. Manageable and sustainable.

The business plan helps the client break down the timeline into bite-sized chunks that make it manageable and sustainable, not overwhelming or likely to lead to burnout.

## C. Provides flexibility and freedom to change.

Although the vision and plan provide structure, they are flexible, which allows for more learning, adjusting, and fun in appreciating the process.

**D. The 3-year plan allows for a broad strategy and a bigger vision.**

It gives the team the direction to which they are headed. It serves as an occasional checkpoint to determine if the team is headed in the right direction.

**E. The 1-year plan helps focus on what needs to happen to "keep the ship afloat" now, while also keeping the bigger 3-year plan in mind.**

While it can be a balancing act of how much time can be spent on each task, having both plans help focus mental and emotional energy.

# How

1. **Invite your client to use their imagination to create a compelling 3-year business vision statement.**

   Remind your client that this is what they *want* to happen, not what *could* happen or what *should* happen. Invite them to dream big and boldly.

2. **Coach them through questions around their Business Vision.**

   Be as detailed as possible. Invite clients to include specific examples using the elements in the above 'What' section. Some clients will have outside requirements (such as an accreditation process or other guidelines) about the timeframe and detail of the plans. Others may find it extremely useful to coach around what length of time would be the most powerful for them to consider. You'll find suggested questions below that use three years or one year as an example. Feel free to change the timeframe to fit your client.

# For a 1 or 3-year Business plan:

- What will your business look like in 1 or 3 years?
- In 1 or 3 years, what will people say about your business?
- What will your business be known for?
- In 1 or 3 years, what will the company culture be like?

- How will you have contributed to the success of your business? How will others have contributed?
- If others work for you, what will they be most proud of in your business?
- What will you be most proud of?
- What kind of leader will you be?
- What values will your business honor?
- How much income/revenue will your business be making in 3 years?

## For a 1-Year or 3-Year Vision Statement:

- What is your 1-year or 3- year Vision Statement?
- What are your 1-year or 3-year business goals? (Add specific target dates.)
- In 1 year or 3 years, what specific goals will your business have achieved?
- In 6 or 18 months, what specific goals will your business have achieved?
- In 3 or 9 months, what specific goals will your business have achieved?
- What strategies will you use to achieve these goals?
- How will you know it's working? What would be the first signs?
- What are signs that you need to change strategies?

## What specific and measurable actions will you take...

- This week?
- In the next month?
- In the next 3 months?

# 9: Assumptions

### *Chapter Overview*

*Our thoughts have a huge impact on our actions. No matter what kind of action a client tries to take, if the assumption is dismal and negative, the action is most likely doomed to fail. This section looks at useful ways a coach can address assumptions and beliefs in a coaching session.*

### *Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious, Courageous, Confident*

### *Skill-Check Questions*

*How will I recognize when my client expresses an idea that contains a limiting belief?*
*How will I help my client see a different way forward?*
*What are useful points to keep in mind when using the Assumption Chart?*
*What's the relationship between assumption and action?*

# Assumptions, Beliefs, and Perspectives

Being proven wrong can be very stressful, and people will often go to great lengths to avoid being proven wrong. Still, this fear of being wrong doesn't prevent people from making assumptions or viewing a situation through a problematic perspective. Most people aren’t even aware of what a perspective is, much less how easy it is to shift to a different perspective. Even fewer understand how to use assumptions and perspectives to their advantage.

The difference between an assumption, a belief, and a perspective can get muddy, but for the sake of the exercises (and to keep things clear in your mind), CTEDU makes the following distinctions among the three concepts.

- An assumption is what a client thinks about something that hasn’t ever been tested. Assumptions are picked up from other people or deduced from past experience.
- A belief, especially a limiting belief, is an idea that has been accepted as being true. It is a trust or confidence in something or someone.
- A perspective is a bundle of beliefs that includes an emotion and acts as a lens or point of view, affecting how information and experiences are interpreted.

The curriculum introduces these exercises in the order of assumptions, beliefs, then perspectives, as a crescendo in difficulty. This progression also works to give clients an understanding of the mechanics of assumptions to beliefs to action to evidence.

# Assumption Chart & Busting Limiting Beliefs

## What

An assumption is an idea believed to be true without being tested. A belief is an idea that has been accepted as true, usually with some evidence (or at least the semblance of evidence). Making distinctions and being exact is useful in the context of life coaching sessions, but for the purposes of this section, assumptions and beliefs will be treated as the same since the same procedure applies for busting both.

Assumptions and beliefs can either be useful or limiting, and life coaching is particularly effective at ferreting out a client's negative assumptions and limiting beliefs in order to replace them with assumptions and beliefs that can be used to move them forward. Replacing a negative assumption or busting a limiting belief has three main parts:

- **Isolating the idea.**

  Identifying the essence of an idea is an important part of understanding the mechanics and system for replacing negative assumptions and busting limiting beliefs.

- **Finding the disconnect.**

  Perhaps at one point in time the idea would have been useful to the client, but in the current circumstances, the idea limits the client and acts as a drag on the client's forward movement. A limiting belief impedes the client's progress precisely because it no longer makes sense to the larger context of their life.

- **Busting the negative assumption or limiting belief.**

  Busting a negative assumption or limiting belief means directly addressing it and identifying new assumptions, beliefs, and actions to take the place of the outdated, negative ones.

# Why

## A. Confirms our beliefs.

It is in our human nature to want our assumptions proven true, even if the assumption goes against what we really want. Why? Because it is extremely stressful to be inaccurate in our assumptions and beliefs about ourselves and the world. A client's assumptions give rise to a perspective, which, when combined with action, has a strong influence on the final outcome. That outcome is usually taken as evidence to support the client's original assumption. It's similar in concept to a self-fulfilling prophecy.

## B. Gets to the root of the problem.

The *Assumption Chart* helps the client get unstuck. It stops them from spending energy in ways that work against their goals. It works because it gets to the root of the problem: the problematic assumptions that clients make about who they are as a person, an area of their life, or a task they are trying to accomplish. Assumptions quickly lead to perspectives, which influence action. As stated previously, assumptions, perspectives, and action determine the outcome, becoming evidence to support the original assumption. This is why it appears that people who have bad attitudes have more bad things happen to them. Fortunately, the reverse is true for people who cultivate a positive perspective.

## C. Increases awareness.

Life coaching excels at helping clients become aware of outdated assumptions and beliefs. More often than not, simply becoming aware of such assumptions and beliefs helps clients discard them. This exercise helps clients see how negative assumptions and limiting beliefs affect them and make it harder to achieve their goals.

## D. Promotes idea upgrade.

Busting an outdated assumption or limiting belief is like getting a software update. It can activate the newest, most efficient version of the client. Clients have the opportunity to choose those beliefs that really work and discard those that do not. It empowers clients to see that they can change to a more positive and effective way of thinking if they choose to do so.

**E. Counter-examples always exist.**

There are always examples, even the smallest examples, that run counter to a client's outdated assumptions and limiting beliefs. Coaching helps clients see that holding onto outdated assumptions and limiting beliefs actually alters their perception—to the point that their outdated mindset negates actual, contrary evidence. Identifying counter-examples is an effective way to help clients realize the power of assumptions and beliefs.

# How: The Assumption Chart

1. **Explain to your client what an assumption is and the relationship between assumptions and evidence.**
   - **Assumption:** to take an unproven thought and act as if it is true, or to take it for granted.
   - **Process:** an assumption quickly leads to a perspective, which has an impact on action.
   - **Evidence:** actions based on an assumption directly leads to results, which become evidence and almost always reinforce the original assumption.

2. **Using an area in your client's life that may or may not be going so well, ask them about some of the original assumptions they have made—or perhaps an assumption around bringing up a difficult topic with a loved one.**

   Sometimes assumptions get mixed together with limiting beliefs. It is completely okay if that happens. For the sake of these exercises, assumptions and limiting beliefs may be considered synonymous. However, once your client understands the difference between assumptions and beliefs, it helps them avoid negative assumptions even before they become entrenched as limiting beliefs.

3. **Isolate one assumption.**

   It is typically something like, "Talking to this person about this topic is impossible." Write the assumption in the top left box.

4. **Explore what perspectives rise out of that assumption, and write them in the square in the bottom left area of the chart below.**

5. **Next, explore what kinds of actions are most likely to be taken from that perspective.**

   Write these actions in the bottom right area of the chart.

6. **Determine what kind of results will most likely occur from the action, which quickly becomes the evidence that reinforces the assumption.**

7. **This exercise can bring up a lot of great insights and material to use as a basis for coaching.**

   Coach away!

8. **Repeat the process using the Assumption Chart with a positive assumption. Start with the positive assumption in the top left box, then go counter-clockwise through the Assumption Chart.**

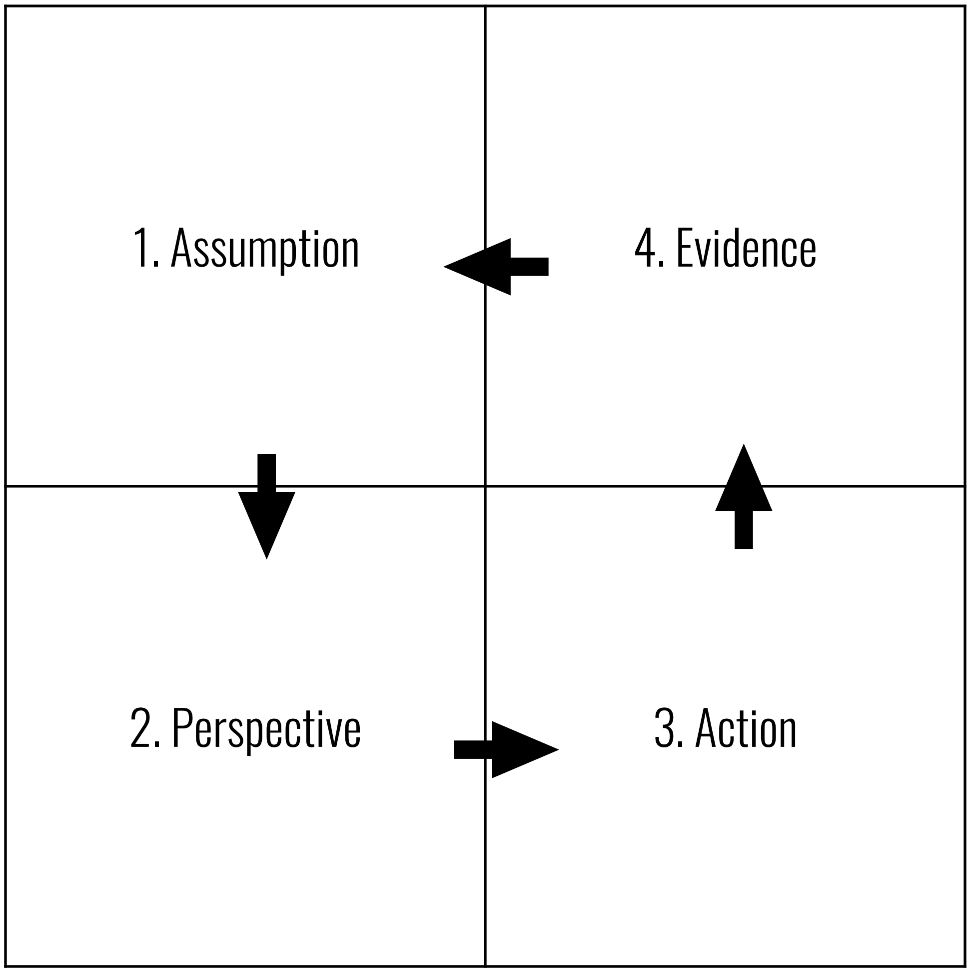
9. **Have your client compare the two charts, and coach through these questions:**

   - How will your client know which chart they are in?
   - What can your client do as a reminder to act from the positive assumption?

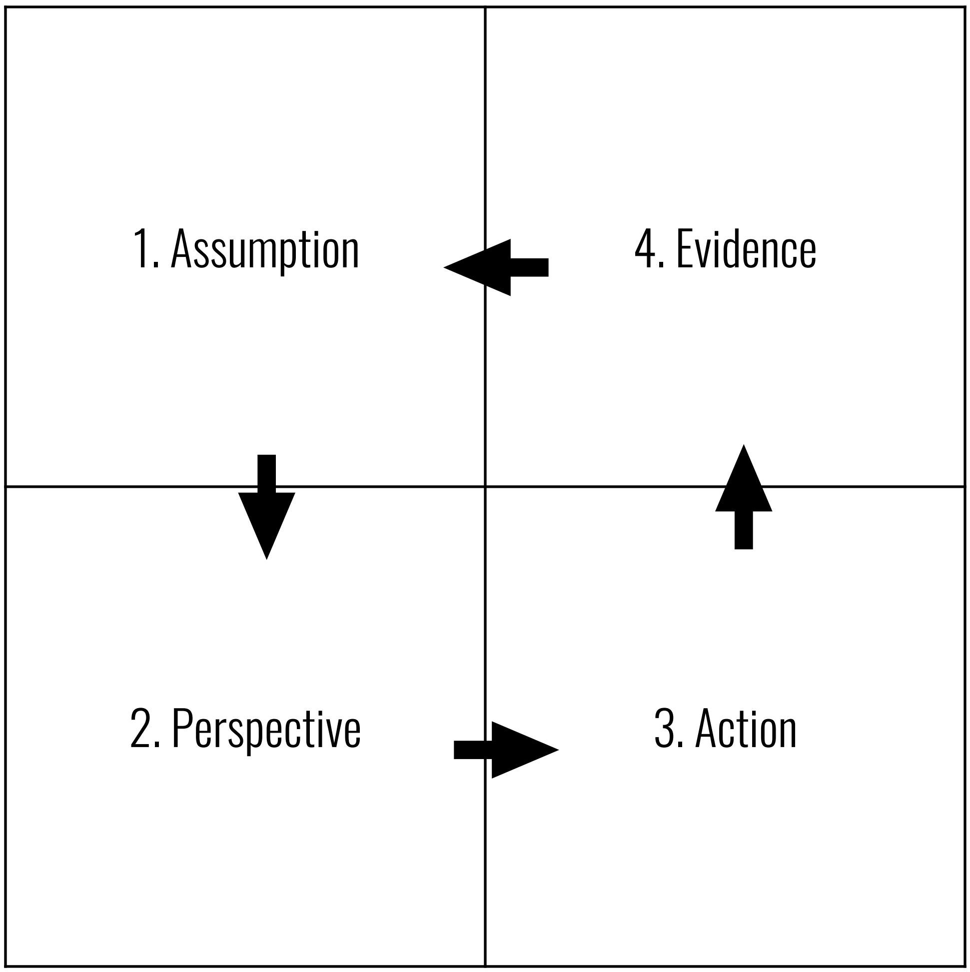
10. **Any other coaching questions that compare the two states of being are great to use!**

11. **Create coaching homework about staying in the realm of the positive Assumption Chart for the next two weeks to see what happens.**

## Negative Assumption



## Positive Assumption



# How: Busting Limiting Beliefs

The key to making the *Busting Limiting Beliefs* exercise work is to find the counter-examples, those little examples that fly in the face of limiting beliefs. Even a small example can create a crack in the previous limiting belief and offer a small gap for another belief to take its place. Look for those small cracks.

It is also important to be mindful of nominalization, the process of turning an action into a noun. The *Busting Limiting Beliefs* exercise is designed to reverse this process and help clients realize that the results they are getting are based on the beliefs and the system they are using, NOT on their innate self-worth or talent.

Coach through the insights and "aha!" moments this exercise generates for your client. Jump to other exercises, such as creating a system or a structure, to lock in your client's learning. Soon, their new belief becomes a perspective, and perspectives are extremely habitual.

1. **Explore a few areas in your client's life that are not going well or places where they aren't getting their desired results.**

2. **Pick one area to start the process.**

3. **Help your client brainstorm a list of beliefs about themself in the context of the topic.**

   Feel free to participate fully in the brainstorming, suggesting possible ideas that your client may or may not have thought of to help the process along. Intuition is powerful, and brainstorming often leads to great insights.

4. **Circle the helpful beliefs.**

   Cross out the limiting beliefs with a single line so they can still be read.

5. **Next to the crossed-out limiting belief, write the opposite belief.**

   It is important to have fun with this next step. Encourage your client to suspend judgment and go with the process.

6. **Ask your client, "In what ways is the new, empowering belief true?"**

   The key is to look for the counter-examples in your client's life: when the empowering belief is true, even if it is just a small example, or even if it is true in a small way. This step is crucial to the success of the exercise. This is where your coaching skills really come into play.

7. **After you have identified several areas in which the new, empowered belief could possibly be true, take it to the next level by asking your client, "What action would you take if you fully accepted the new, empowering belief as true?"**

   Write out the actions in the lower right of the exercise diagram.

8. **Create accountability for the new, empowering belief, and co-create some coaching homework to act on this new belief.**

# 10: Perspectives

## *Chapter Overview*

*Perspectives is a coaching exercise that allows clients to untangle the enmeshment of a limiting perspective that has derailed useful action. This section builds on the previous Assumptions exercise and provides another exercise that offers a step-by-step analysis designed to provoke insight. Perspectives are an omnipresent aspect of life that have an effect on happiness and effectiveness. Clarifying perspectives for a client can lead to life-changing insights and breakthroughs when clients start taking consistent actions from empowering perspectives. Even a subtle shift in perspective can make a huge difference in results.*

## *Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious, Courageous, Confident*

## *Skill-Check Questions*

*Why is the Perspectives exercise so effective?*
*What are the most important steps in the Perspectives exercise?*
*How will I help a client identify and explore their default perspective?*
*How will I help my client clarify an empowering perspective?*

# Perspectives

Most people have heard about the importance of having a positive attitude. Indeed, like goals and organization, having a positive attitude is a great asset. However, the notion of a positive attitude is often overused or pushed in the wrong context. In addition, many people don't have a system to consciously access a positive attitude in a given situation. Clients slip in and out of a myriad of perspectives throughout the day depending on the circumstances they encounter. However, they also draw on a handful of default perspectives to make sense of themselves and the world. It is important for a coach and a client first to identify the client's default perspectives. From there, the coach and the client can work together to create and shift to empowering perspectives that engage with reality in a meaningful way and lead to effective action.

The *Assumption Chart* and the *Busting Limiting Beliefs* exercises have helped your client shift thoughts on a few topics. Now, it's time for your client to take a huge leap and begin to create a few powerful perspectives into which they can slip at any point in life to consistently drive positive, effective action. Perspective is the filter through which they make meaning out of their experience and perception.The *Signature Perspective* exercise gives clients the tools to directly address their attitudes and assess the root cause of being stuck or ineffective.

# What

- **Beliefs and attitudes.**

  A perspective is a set of beliefs and attitudes through which something is perceived. It influences perception and the actions a client takes. It has both a mental structure and a typical emotional association. From a life coaching point of view, being able to identify the usual way a client sees themself, as well as the situation, is essential for increasing self-awareness and taking more effective action.

- **A filter.**

  A perspective also serves as a filter through which a client sees reality. It often causes them to ignore or exaggerate things that do not fit within their perspective, make generalizations based on experience, and apply these generalizations to other experiences.

- **A lens.**

  Whereas assumptions and beliefs usually focus only on one part of a client's life, a perspective extends to and affects all areas of life. A perspective acts as a lens to interpret information, prompt assumptions and beliefs, and drive decisions. Perspectives are incredibly powerful, and much of their power comes from how quickly they become habitual.

- **A default perspective.**

  A default perspective is a client's "go-to" perspective on life, particularly their usual perspective when faced with a challenge, new ideas, something out of their comfort zone, or resistance.

- **An empowered, signature perspective.**

  This is the perspective that will serve us well in order to achieve our goals. We want this perspective to be our "signature" so that our thoughts can positively influence our actions and outcomes.

# Why

A. **Having a certain perspective is a large part of the human experience.**

   Perspectives are incredibly useful to clients because they affect a client's perception of reality. It is impossible for people to see reality objectively without the filter of perspectives.

B. **Since perspectives shape how a client perceives reality, their influence is undeniable.**

   If the client has the perspective that they are an underperforming employee, and then they adopt a negative attitude, it is much harder to perform well and receive a positive performance review from their manager. On the other hand, if that same client is able to shift their perspective to realize that they have the tools needed to be a strong performer, and they can adopt an eager or even positive attitude, the client is able to take much more effective action and get better results.

### C. Coach-client relationship creates perspective awareness.

The coach-client relationship is an outstanding tool for helping clients become aware of their default perspectives and help them adopt more useful perspectives.

# How

### 1. Start with a particular focus and identify one topic.

As with the *Assumption Chart,* this exercise begins with a particular topic. The topic can be something that's currently challenging for your client or something that's easy. I've found it works well to refer back to the *Wheel of Life,* and ask your client to pick a wedge for the topic.

### 2. Generate different perspectives.

Sometimes it's a challenge for clients to think of different perspectives. You may have to offer a few to get the ball rolling.

### 3. As you generate different perspectives, take a little time to explore them.

Is there a default perspective that comes up? Is the default perspective useful for the client to achieve their goals? How would your client approach the topic differently from this perspective? Try out a different topic to see how it applies and what effect each perspective has on each topic.

### 4. Ask your client to identify one or two perspectives that they would like to use in their lives.

Usually one or two perspectives seem like the obvious choice. If two are outstanding, combine them. This will become your client's most empowering perspective, or their signature perspective.

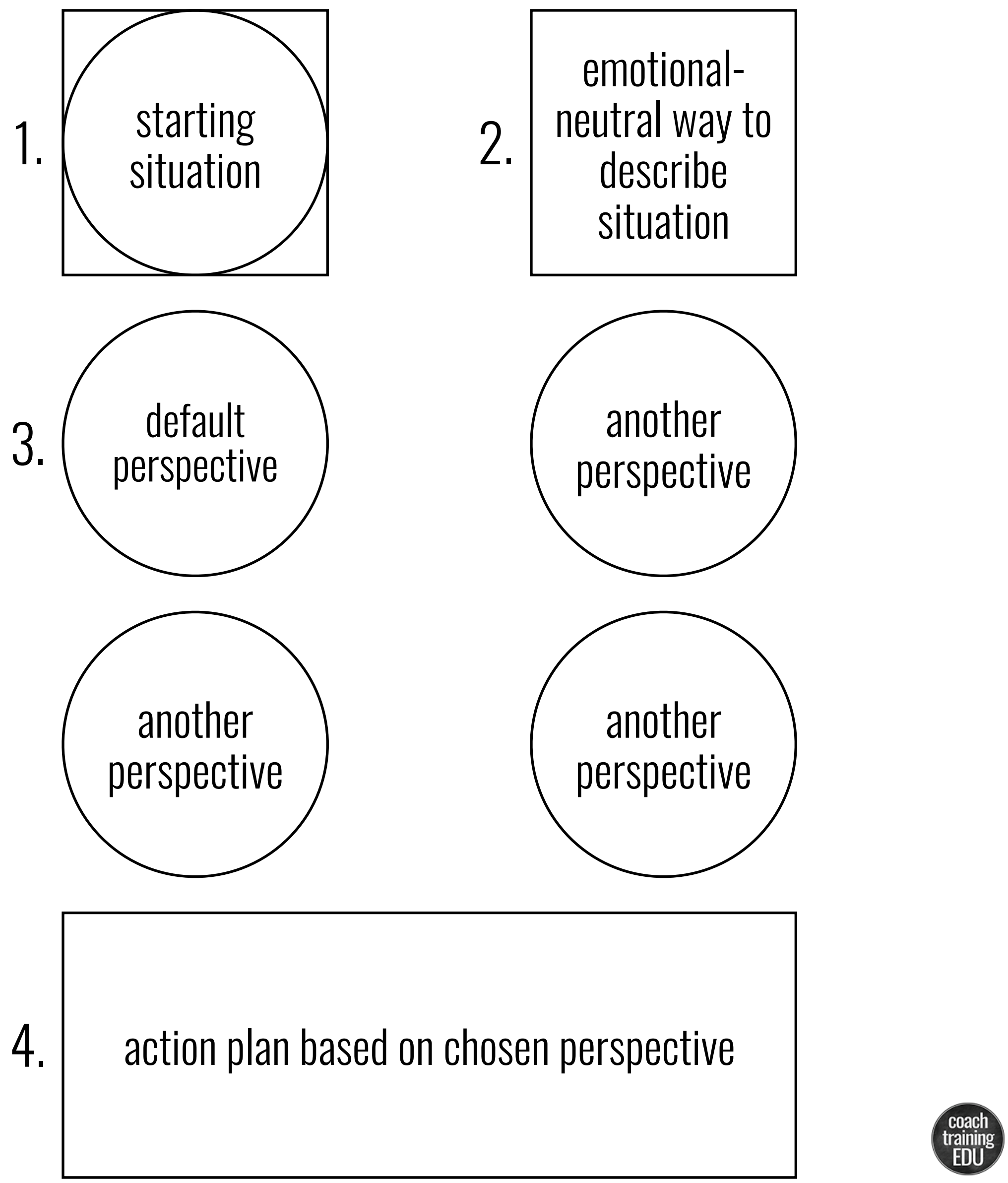
### 5. Create an unusual name for the signature perspective to make it easier for your client to remember.

These names can be a combination of adjectives in an unusual word order or an object that serves as a metaphor for the perspective. It's also helpful to design a system and structure for your client to use the new signature perspective. For example, if your client wants to cultivate a perspective of gratitude when they're feeling frustrated at home, they might refer to a gratitude journal they've filled with all of their family's best memories.

6. **Explore what action is possible from this signature perspective.**

   You can easily pivot to action steps by asking what action naturally arises from the perspective. You can also ask what action steps would test the strength of your client's ability to stay in the perspective even in the face of setbacks or challenges. Enjoy the energy of the exercise. It’s high-energy and positive; clients will come out of this session glowing.

# Perspectives



# 11: Values & Passion

## *Chapter Overview*

*Exploring values and passion adds layers of depth to goals, strategic outcomes, and vision. Often, even the pursuit of clarifying values and exploring passion provides life-changing insights for clients.*

*This section looks at a few coaching exercises designed to explore the intersection of values and passion with action steps and a clarified mission statement.*

## *Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious, Courageous, Inspiring*

## *Skill-Check Questions*

*What is the difference between a topic value and a process value?*
*How do values and passion relate to decision points?*

## *Etymology*

*Often referred to in graduation speeches, and either lauded or regarded as overrated by business gurus, passion typically refers to our much-loved pursuits, internal drives, and lifelong desires. And while this definition is useful, looking at the etymology of the word adds a layer of depth. The word "passion" comes from the Latin word* patior*, which means* to suffer. *In the hands of a skilled coach, passion is something that your client is willing to pursue even in the face of suffering. Why? Because the whole process—the successes, the failures, the learning, the journey—is worth it.*

# Clarifying Values

## What

Values are unique to each individual, representing what is most important. A person can share values with other people, but a complete list of values is like a fingerprint. By contrast, morals are customs and beliefs about what is right and wrong, usually held by society as a whole. Ethics involve conformity with a code of conduct that is usually narrowed by a particular field or profession. Each society has its own moral code, and each profession has its own ethical guidelines.

For life coaching purposes, values have the following main components:

- **Worth.**

  A value is something that the client holds to be important and have worth. If something is worth it, people are willing to give or relinquish something for the sake of it. For example, if exercise is a top value for a client, they are willing to give up an extra hour of sleep in the morning. If spending time with family is a value, people are willing to focus on family and spend less time with friends. Values inherently imply a sense of worth and sacrifice.

- **Topic Value vs. Process Value.**

  From a life coaching perspective, the two kinds of values are topic (the general subject of the value) and process (a quality of the actual experience). "Family" would be a topic value. Identifying "family" as a value is a good start, but it would not qualify to be a process value. "Spending time together as a family" gets closer to a process value. "That moment when family is together, and everyone smiles and laughs at the same time" is a good example of a process value. The more specific and clear you can get on both topic and process values, the more useful and powerful your sessions will be in your client's life.

- **A name.**

  Using too many words when naming values can be more cumbersome and less useful than values with short, unique names. Using the example above, the "moment when everyone laughs at the same time" could be termed "Laughter Shared." Creating a unique name gives a value more meaning and versatility for the client. For example, the client with the value "Laughter Shared" may also find ways to apply it at work with colleagues.

- **Inspires action.**

  Once a value is clear and has a name, the last criterion is that a value inspires and informs action in the client's life.

# Why

### A. Serves as a guide for making decisions and well-designed actions.

Values are an effective guide to creating well-designed actions. Indeed, values act like a compass and a map directing a client along the path ahead. They form the foundation for creating a compelling vision.

### B. Provides the basis of fulfillment.

Having clearly defined values—and taking action to honor those values—is the foundation for a fulfilled life. Living a life aligned with values does not always mean that a client's life will be easy, but it does mean that your client will understand the importance of aligning actions with values. If a client takes an action that aligns with their top values, the client will avoid inner conflict, even if the action is difficult to take.

### C. Drives a sense of purpose.

Having a defined and ordered list of the client's top values gives life a structured sense of purpose. Of course, values can and do change, but having a clear list gives a clear sense of completeness and purpose that can simplify and enrich life.

# How

1. **Introduce the idea of values and the importance of finding the set of values that is unique to your client.**

   Explain that taking action based on values is a way to achieve a more fulfilled and meaningful life. This work adds further structure and gives your client another tool for making decisions wisely.

2. **Explore different areas of your client's life to determine what is most important.**

   I often ask questions like:

   - When you were at your best, what were you doing?
   - Think back to a peak experience. What did you do to make it happen?
   - What do you really *dislike*? (In others or in a particular task? The opposite of what you dislike can elicit a value.)
   - If someone really knew you, what would they know about you?
   - What is the *most* important thing to you? What specifically is important about it?
   - If you could only take one thing with you on a trip, what would you take? Why?
   - Who is a person you admire? What do you admire about that person?
   - What gives you strength?

3. **Help your client brainstorm fun names for their values.**

   If your client can name a value—and the name is a little weird—your client has a much better chance of remembering that value and using it to inform their thinking.

4. **Ask the client to further describe each value.**

   This is where your coaching skills become crucial. The more detailed and meaningful the value, the more powerful it will be.

5. **Once you have a list, order the list in terms of what is most important to your client.**

   Ordering can be a challenge, but it can really test the importance of each value.

6. **Work with your client to design where they want to be with their stress level, what actions they want to design, what they want to become more aware of in their stress level and response, and what they want to focus on for next week.**

7. **If a concrete accountability comes out of the coaching, great.**

   If not, that is okay. The other exercises in the session lend themselves more to creating great coaching homework.

# Identifying Your Passions

Similar to the distinction between a topic value and a process value, the initial exploration of an interest can uncover your deeper passions. When you have found something your client cares about so much that they will take bold action and persevere through mistakes, you've found passion. Align that passion with a need in the community, and you've got the path to develop a leader. This exercise attempts to ground clients in an awareness of passion, while the following concepts in the coaching sessions look to nurture that passion with action steps. It is not just about exploring what your client loves to do but helping them understand why they love doing it.

## What

- **Clarify passions by exploring interests.**

  Exploring different areas will spark awareness of your client's interests and passions.

- **Make a distinction between a topic and a process.**

  Exactly like the difference between a topic value and a process value, you can also distinguish between passions. Practically speaking, not much separates a value from a passion other than the intensity of pursuit. People tend to pursue passions more than values, but in function, the concepts are extremely similar.

- **Acknowledge that the pain is worth it.**

  Tapping into the etymology of passion as experiencing something painful, your goal is to help your client prepare for doing hard things, build resilience, and improve endurance to keep going when challenged.

## Why

A. **Relates to grit.**

Grit is the ability to keep moving forward when the going gets tough. Recently, scholars and educators have lauded grit as perhaps the single most important skill that leads to success. Helping clients identify something worth fighting for helps them build grit. Having a clearly-defined passion mentally prepares people to expect, and even welcome, obstacles.

**B. Promotes action.**

Doing the work to understand a passion clearly makes it easier to identify which action to pursue. People like what they understand. Making a reason more understandable makes the required action more acceptable. Try it. The human mind is wired to encourage Flow, and a big part of Flow is playing in the area between complete understanding and slight confusion. Making the slightly confusing understandable is another definition of learning. Crafting a slightly vague interest into a crystal-clear passion mimics the brain's circuitry of learning and Flow. Amazing actions and results happen when engaged in Flow.

# How

1. **Introduce the idea of passion as something worth doing even when things get hard.**

   This exercise is straightforward. The coaching focuses on being curious about *what exactly is it about what the client loves to do that makes them love it so much.*

2. **Become curious about what your client loves to do and why.**

3. **A favorite question is: "Are you interested in anything that is considered odd or unusual?"**

   This question often elicits great clues to passions. Sometimes there is nothing there, but if there is, then it's usually a great place to explore. Other suggested questions:

   - What do you love to do? Why do you love doing it?
   - What activities give you purpose?
   - If you had a month completely free of obligations, what would you pursue?
   - What would you pursue if you were guaranteed to succeed?

# Precise Mission Statements

## What

By using the lens of a specific project, the *Mission Statement* exercise provides a natural limit or boundary for the mission statement. Such a boundary is useful in removing pressure from the mission statement needing to be an over-arching, "this-is-my-one-and-only-life-purpose sentence that captures every facet of my being." It adds precision to your client's immediate, strategic goals.

The *Mission Statement* is a concise sentence that identifies aspirations and is easy to reference throughout the day. It aligns action with intention and guides decision-making. A simple, powerful mission statement has the power to influence major life decisions, helping clients determine the best action to take based on a larger vision. A mission statement has these three characteristics:

- **Short, sweet, and to the point.**

  Your mission is what you are sent to do. A mission statement is a short sentence, usually ten words or less, that captures the purpose of the leadership practice. Short, sweet, and to the point, a mission statement speaks to both the action and the desired outcome.

- **Inspiring.**

  Another quality of mission statements is the motivation they inspire. You know you have created an outstanding mission statement when it inspires you and others to take bold action.

- **Guide for action.**

  At its best, a mission statement guides decision-making. A simple, powerful mission statement has the power to influence major life decisions and guide day-to-day business and/or personal decisions regarding which actions to take based on a larger vision.

# Why

### A. Powerfully communicates.

A strong mission statement helps others understand why your client is taking on the project. Such communication makes it easier for your client to express a vision quickly, which is an important element of being an effective leader.

### B. Provides focus.

A strong mission statement provides focus. In a world filled with distractions, having a clear, short-term mission statement can be extremely powerful in helping clients tone down the outside noise. The increased focus facilitates clients' more productive accomplishment of well-designed actions. Accomplished missions lead to a powerful cycle of an increased sense of accomplishment, stamina, and skill, which leads to better outcomes. The positive cycle of accomplishment and effort is set in motion, and a strong mission statement provides the focus for the process to continue.

### C. Inspires motivation.

Mission statements add a level of importance and fun to projects, which helps clients tap into intrinsic and proactive motivation.

# How

### 1. Start with identifying your client's passion using the concepts from the previous section in this chapter.

Use the *Mission Statement* diagram, and have your client write out their passion on one side.

### 2. Explore the need your client sees in the world.

What is needed in the community? What is life asking of you right now?

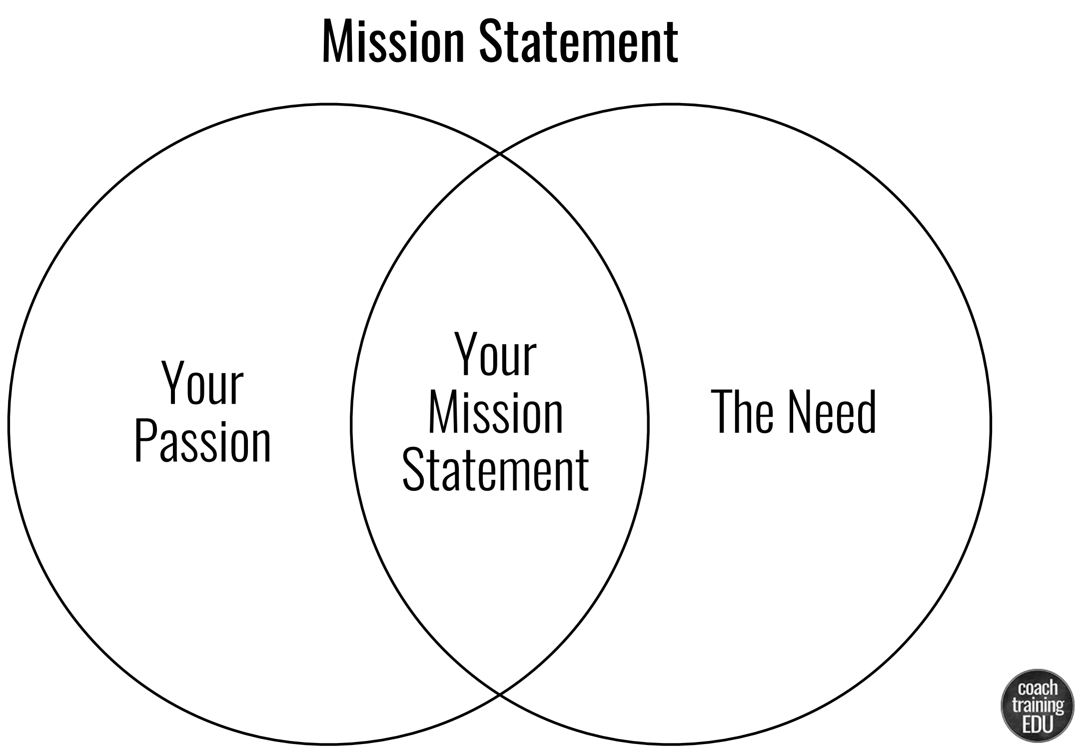
3. **Have your client explore the intersection between the passion and the need.**

   Have them write this in the middle of their *Mission Statement* diagram.

4. **Give your clients some coaching homework.**

   Encourage your client to co-create homework around their newly formed mission statement. For instance, they can bring their mission statement to mind one or more times a day.

5. **Push your client to take action steps based on the Mission Statement that could evolve into a leadership practice.**



# Leading Company Culture

Company culture is a reflection of what the organization stands for and the values in which it believes. Whether or not a company has a positive, thriving culture depends on how effective the alignment is between their values and the actions, behaviors, and attitudes embodied by the people who work there.

Because executives are the voice of the business, it is their responsibility to set the tone for a strong, positive culture. When the culture is clearly defined, and everyone is encouraged and expected to contribute to it, then all employees are invested in ensuring its success. When the leadership team provides a work environment that the staff enjoys, and they all believe in the company's mission, it can help improve staff performance.

Company culture is pre-existing and embedded in a company's genetic code. It is the vision for what the founders and the top leaders want the company to become. New employees and clients don't bring it with them; instead, they enter a culture that already exists. Because of this, it is important that both the supervisor and the potential employees feel that they are a good fit for the company culture, even before they are hired. No matter the current role of your client, being aware of the company culture is vital to how the client behaves, thinks, and makes decisions professionally. Coaching helps clients be proactive in understanding and being a positive influence on company culture.

# What

- **Elements of company culture include:**
  - **Shared Values, Attitudes, Beliefs, and Behaviors —** These are the main factors that contribute to a company's unique social and psychological environment. What do we believe in, and how do we behave? For new companies, it is the responsibility of the founding leaders to determine this and the role of all future company leaders to ensure that these shared values, attitudes, beliefs, and behaviors are honored.
  - **Expectations —** From the shared values, attitudes, and behaviors come what the team expects of each other, of themselves, and of their interactions with the outside world.
  - **Policies —** The policies and rules — either written or unwritten — stem from the values and expectations.

- **Developed over time —** The word 'culture' is derived from Latin's '*cultura,*' meaning to grow and cultivate. Culture is not something that can be created overnight, but it can be cultivated over time. It's something that requires consistent energy and care, encouraging steady growth toward your ideal company culture.
- **Touchstone —** Expressing the elements of the company culture clearly and concisely in written form can serve as a touchstone for major decision making, for the hiring process, and when the company needs to realign its actions with its values.

- **Elements of a *positive* and *thriving* company culture also include:**
  - **Enlisting, empowering, and encouraging —** Strong company cultures align people to the culture. Leaders must stimulate people to be excited, proud, and appreciative of the culture. When everybody *owns* the culture, it is more likely to thrive.
  - **Establish trust —** Trust is the cornerstone of any culture that thrives. All members must trust the leader to take them in the direction that they need to go, and all members need to trust each other for the company to keep moving forward.
  - **A respectful workplace —** How people treat each other in the organization must be openly addressed regularly. Is the Golden Rule being applied to everyone consistently regardless of whether the other person has a different role, ideas, or values?
  - **Caring for each other — The culture must attract** people who naturally care about the work and each other. When team members genuinely care for each other's well-being and interests, the work and the relationships become more meaningful.

- **Core Values Statement.**

  It is important for the leaders to write down the Core Values so that everybody knows what they're getting into when they're joining the company. Everybody should know the Core Values, and the leaders should regularly discuss the alignment of behaviors, actions, and decisions with team values.

  From a coaching perspective, the three main components that coaches can help clients address regarding company culture are:

  - Clarifying what they want their company culture to be.
  - Communicating the company culture with others.
  - Following through: team members aligning with the brand and honoring the company culture.

# Why

**A. Company culture affects every aspect of the company. For example:**

- Employee acquisition and retention
- Customer acquisition and retention
- Productivity and performance
- Morale
- Guidelines on customer care and service
- Product quality and safety
- Attendance and punctuality
- Concern for the environment
- Communication styles
- Problem-solving
- Handling challenging employees
- Termination process

**B. From an executive coaching point of view, in order for a leader to grow, they must know where the company culture currently is and where they want it to go.**

From there, a coach can effectively help the client reflect on how their behaviors are contributing to the company culture, and what needs to be done in order to move closer to the desired culture.

# How

**1. Help clients clarify what they want the company culture to be.**

Ask your client powerful questions regarding the elements they wish to be embodied in the company culture. Examples:

- What is the *most* important thing for the company? What, specifically, is important about it?
- What are your company's top three shared values?
- What specific qualities do you want your company to have?
- What do you expect of each other?
- When your company is at its best, what is it doing?

2. **Help clients communicate the company culture to fellow team members, customers, potential employees, and the outside world.**

   Examples:

   - How will all team members (existing and future) know what the company culture is?
   - How will the outside world know what the company culture is?
   - What is the role of the CEO and the leadership team in communicating the company culture?
   - What is the role of the employees in communicating the company culture?
   - How will people remember the elements of the company's culture? (See Core Values Statement above.)

3. **Help clients understand whether or not their company is living up to the promises of its brand. Help clients learn to identify if they're consistently honoring the company culture.**

   Examples:

   - How is your *actual* company culture right now compared to your *desired* company culture?
   - How do your company's employees hold each other accountable to consistently honor the company culture?
   - How will you know if the current company culture is straying from the desired culture? How will you get back on track?
   - To what degree are you following through on building the culture that you want versus letting it slide?

- What systems are in place to ensure alignment of the company's values with the company's people?

4. **Explore coaching tools to share with your client that they can implement into the company culture to consistently honor the company culture.**

   For example:

   - Decision points: How can your client use the Core Values statement in making decisions?
   - Levels of listening without judgment: How can these listening skills be instilled in the company to create a safer space?
   - Empathy: How can your client gain a better understanding of the total experience at the company?
   - Acknowledgments and Championing: How can your client reinforce positive company culture? How can they push the company culture to the next level?
   - Feedback: How can company employees give feedback responsibly and receive feedback gracefully?

5. **Design action steps that the client can implement to positively influence the company culture.**

# 12: Systems

## *Chapter Overview*

*This chapter dives into Systems thinking to help clients understand the power and use of creating structures and habits that lead to desired outcomes. It also zeroes in on key decision points within a system that act as leverage points for making the system run smoothly.*

## *Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious, Courageous, Confident*

## *Skill-Check Questions*

*How can I use Systems thinking as a coach?*
*What is the value of a decision point?*
*How can clients use Systems thinking to gain empowering perspectives on results?*

# Systems

The *Systems* exercise is designed to help clients be proactive, work differently, and be more effective. A system is a well-planned process consisting of a collection of objects and actions that function as a whole. This exercise is crucially important because it helps clients understand that their outcomes (e.g., current finances, current job, current health, current social media marketing knowledge, etc.) do not reflect their intelligence or innate self-worth. Rather, those outcomes are merely a reflection of their current systems and ingrained habits. The keys to *Systems* are:

- **Looking at the world from a systems point of view helps clients avoid putting things off or procrastinating,** which always prevents them from taking important action steps.
- **Clients are NOT their results.** Instead, their results are a reflection of the system they are using. If they change their system, then they change their results.
- **Systems are an integration of action, materials, and time.** The more specific a system is regarding *when* something takes place, *what* the needed materials are, and *what* action will take place, the stronger the system will be.
- **Identifying the points where a decision must be made.** In terms of systems, an example of a decision point may be the moment you come home from a networking event with a stack of business cards. Having an effective system in place will help you decide what to do with those cards.
- **A system will only be used if it makes the action easier and more effective than it was before.** Systems need to be simple and become stronger with use, not require more time or energy.
- **Effective systems often address the little details.** What little thing can you add to what you've already developed? What would make this more effective? Look for the details.

# What

An effective system consists of:

- **An inventory of original resources.**

  Everything is a resource: the plethora of papers you have on your desk at work, the amount of time you have on your hands, and your level of energy. In a system, everything is considered a resource. In the example above, the client wants to create a system to efficiently put contact information from collected business cards into their computer database. Some of the resources include the collected business cards, a filing box to store them before they're entered into the computer, the computer database, a place to store the cards after they've been entered, and the amount of time that the client wants to allow between time of card collection and entry into the computer.

- **Structures.**

  A structure is an object, or a designated space to put something, that directs the flow of a system and makes the whole system work (e.g., a new filing folder designed to streamline a project). Mental habits are also structures, such as using a particular perspective to set a consistent reminder on a phone. Such tangible (phone reminders) and intangible (the perspective used to set the reminder) structures are extremely powerful and effective. For example, consider a client who creates a Well-Designed Action to place his card filing box next to where he routinely puts his wallet when he gets home each day. The habit functions both as a tangible structure (the box) and a reminder to drop new cards into the "not yet contacted" part of the box.

- **Flow.**

  Flow is something that happens naturally. It is the energy of the system that moves it effortlessly in the direction the structures point. Without a structure of a filing box, new business cards from a conference tend to be stuffed in pockets. In this case, the natural flow would be from the pockets to a larger inbox (best case scenario), but this will likely be lost under larger pieces of paper and forgotten for a week. With a structure of a filing box that sits next to the keys at home, the natural flow is to see the "Not Yet Contacted" section of business cards move to the "Contacted" section. There's now a structure guiding the flow. String more structures together to guide a flow, and you've got a system.

- **A decision point.**

  A decision point is the intersection of structure and flow. For example, the key decision point in the system is the decision to put the new business cards in the "Not Yet Contacted" part of the box as soon as the client arrives home. If a client follows through with that choice, then the rest of the steps fall into place. Since that action is the hinge on which the system depends, it's essential to make that step as clear, simple, and easy as possible.

- **A desired outcome.**

  If the outcome matches what the client wants, and the system made it easier to achieve, great! If not, then the client should go back, adjust their structures, and see how they interact with the natural flow. In our example, the client's desired outcome is to have an easy routine of entering business cards into his computer database quickly, efficiently, and in an orderly manner. The client is getting their desired outcome at the moment, so they have created a successful system.

# Why

### A. Structures guide flow.

Systems work because structures make work easier by enabling a natural flow. For example, let's consider the simple Well-Designed Action of placing the business card box next to where the client will place his wallet when he gets home. Systems work because once the client sees the box, the natural flow is to place new business cards in the box. The key to making a system work is to create structures that guide flow easily and naturally.

### B. Structures break down bigger tasks into smaller tasks.

Systems work because they naturally break down bigger tasks into smaller tasks. In the business card example, the overall task is broken down into a series of smaller, manageable steps. As a result, this not only creates a card-to-computer pipeline, it also helps break down potentially bigger tasks, like reducing clutter and being able to find a phone number quickly.

### C. Structures are not personal, so try new things.

Some of the magic of thinking in terms of a system is taking judgment out of the equation. So often, people attribute success or failure to a personal character quality, which puts people into a fixed mindset. The downside to a fixed mindset is the increased pressure to be immediately successful and to intensely try to avoid failure. It's nearly impossible to adopt a playful attitude with a fixed mindset or take personally success or failure. Instead, thinking in terms of systems allows your client to experiment with new actions, putting new structures in place. If a system doesn't work, no big deal; try something else. Keep trying new things with the system until something clicks.

# How

### 1. Introduce the concept to the client.

The idea is to assess the starting point, the endpoint the client is trying to achieve, and the structure that will allow that final outcome to take place. When introducing *Systems,* an easy target is asking about the messiness of your client's living space. Clothes, laundry, dirty dishes, and trash containers provide a quick visual check to see how dialed in your client's cleaning and organizing systems are.

### 2. Determine the outcome your client wants to achieve.

Ask your client to identify their ideal end state or goal.

- What do you want to achieve?

### 3. Explore how values impact systems.

Creating a system is great, but tying it to a set of values makes the system feel more meaningful. Questions to consider:

- What value in my life am I honoring with this system?
- How do these action steps align with my values?

4. **Help clients think in terms of systems.**

   Ask about the steps and processes your client uses in their existing systems, such as how they go about attempting to keep their living space tidy. Ask about resources they have at their disposal. Consider questions like:

   - What does your system look like right now?
   - What resources do you use in your current system?
   - When do you make the decision to execute your system?

5. **Identify helpful aspects of the current system.**

   It might be easier to build on what *is* working than to scrap the whole system. Other times, a fresh start is more effective. Leave this up to your client. Outline the current system and look for the little details that are working. Consider questions like:

   - What about your current system do you like?
   - What is working in your current system?
   - How do you know this is working?

6. **Identify what's not working.**

   When looking at a messy living space, computer desktop, or to-do list, the tendency is to start cleaning things up. Although your client may immediately feel better, cleaning up has not solved the real problem—and soon, the mess has returned. In the process of cleaning up, your client has taken away all the evidence and clues about what structures are needed to create a more helpful system. Avoid the urge to clean up immediately. Instead, approach the mess like a scientist looking for clues so that you can create a lasting structure that will yield sustainable and desired outcomes. Consider questions like:

   - Where in your system do you get stuck?
   - What is failing in your current system?
   - What's the first thing to fail in your current system?
   - What's not working?

7. **Explore the next two prompts—Decision Points and Structures—simultaneously.**

   The purpose of having Decision Points before Structures is to prompt clients to think in terms of time. Anything your client acquires will, at some point, demand time and attention. A good system requires three key things: (1) Who (2) does what, and (3) when? In this case, the 'who' could be a person (e.g., the client) or an object (e.g., a computer or a trash can). The 'what' helps make up the structures of the system. 'When' isn't always attached to a time on a clock. For example, your client might say, "I need to manage the sticky notes on my desk by lunch." Consider these questions:

   - What tangible resources do you need to create a more sustainable system?
   - What do you need these resources to do?
   - When do you need to complete certain tasks to keep your system working?

8. **Draw the map of the system and include a visual representation of raw materials, time, decision points, structures, and desired outcomes.**

   This important and useful step helps clients lock in the learning about systems and move forward in creating new systems.

9. **Create Well-Designed Actions.**

   Now it's time to shift into creating action steps to test the structure of the system.

# Making Decisions

One of the main benefits of knowing one's values is applying that knowledge to make wise decisions aligned with those values. This exercise aims to help clients apply their values to the decision-making process. Using the previous exercise of *Systems*, pinpoint the actual time when your client is going to decide to follow through on a value or ignore the value and make a different choice. Then, guide your client in using these newly-minted values as structural support. Assist them in bringing more of what they really want into their life.

## What

- **Clarified value.**

  Start with the value that you created and clarified in the previous exercise.

- **Decision point.**

  This is the point before your client actually takes action in alignment with the value. For example, if the action is to work out in the morning, the actual decision point is probably the night before, when your client decides to set their clothes by the bedroom door.

## Why

A. **Combats over-optimism.**

   Many well-intended actions and values are torpedoed by over-optimism. Unrealistic thinking that says, "I can just wing it or get ready from scratch in the morning," usually leads either to frustration or to frantically hustling around to beat the clock (or sometimes a bit of both). Preparation is the key to being successful. By taking the extra step of identifying not just the value but also the action to take, and the preparation required ahead of time, your client has more tools to follow through.

**B. Promotes systems thinking.**

The idea of identifying the preparation and the decision point ahead of time helps you and your client think in terms of systems. Developing systems is a powerful tool. When you tie systems with values, you help your client develop a positive, synergistic cycle.

# How

1. **Transition from identifying values to identifying *when your client is going to use them to make decisions*.**

   Describe the process and look back to a system that you jointly designed to help your client achieve something in their life.

2. **Write down the area of focus.**

3. **Write a quick description of the system.**

4. **Identify the value most applicable to this area of focus.**

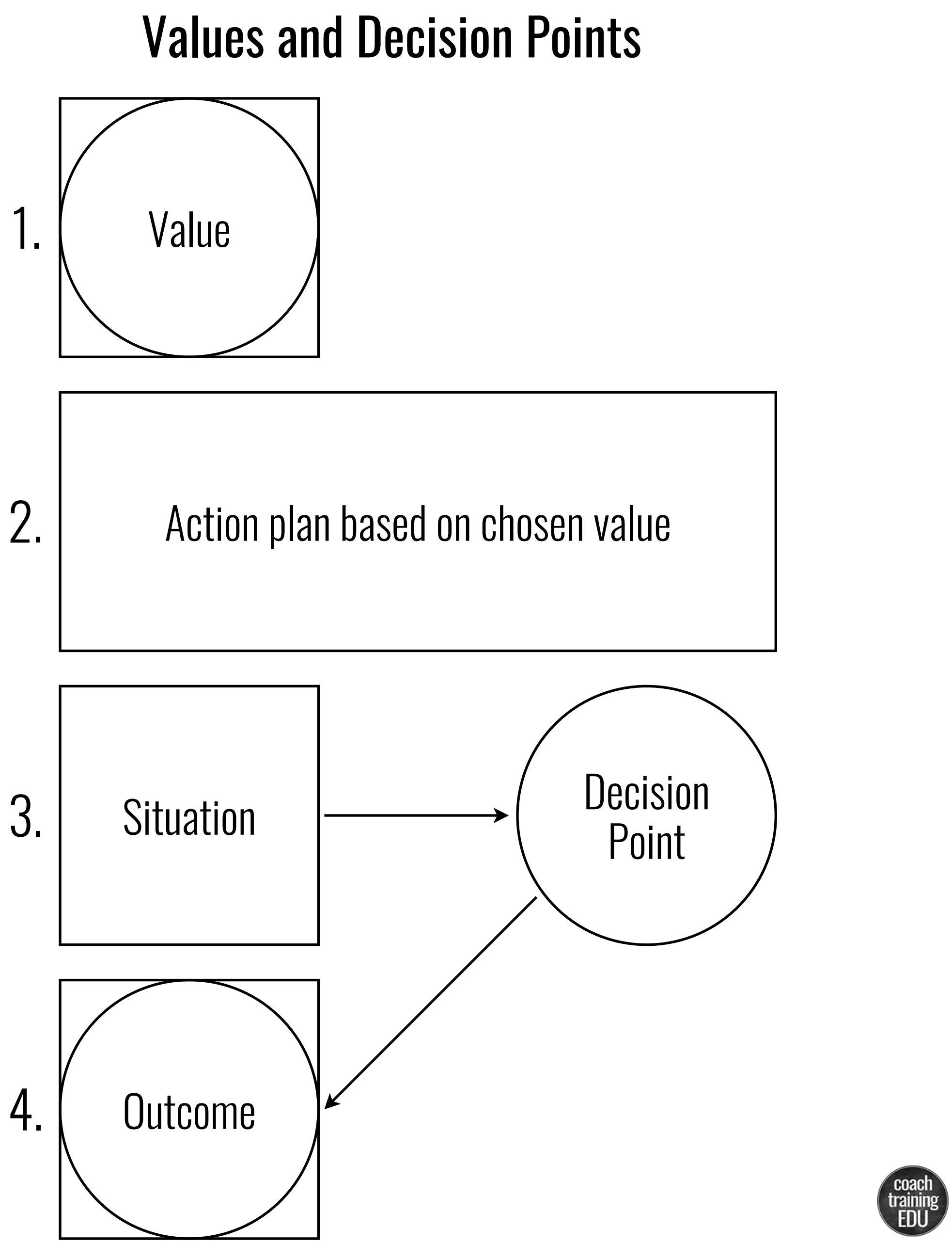
5. **Look at the specific point in time when your client will decide to honor the value, follow through, or make a different choice.**

   Make that decision point obvious.

6. **Create a new structure, or modify one that already exists to help your client employ the value to make the choice.**

7. **Record any other insights the exercise brings up along the way.**

   There's a prompt to record insights at the bottom of the diagram. You can also apply this exercise to other areas to look for patterns in your client's life. Chances are, if they are doing this in one area of life, it is also happening in other areas. This exercise creates a rich coaching environment.


Values and Decision Points
1.
Value
2.
Action plan based on chosen value
3.
Situation
Decision Point
4.
Outcome
coach training EDU

# Examples of Decision Points:

- **Self-Care Value:** The point in the morning when I have to choose between hitting the snooze button or getting up for a morning jog. If I honor my Self-Care Value, I will get up and go for the jog, knowing that I am taking care of myself and setting myself up for a great day. If I ignore my Self-Care Value, I may have a few more moments of sleep, but I will feel guilty for the rest of the day and may be a bit sluggish.
- **No Regrets Value:** The point when I decide whether to commit to hiring a web designer for my business website, or not. The web designer is waiting for my reply, and before I answer him, I can either honor my No Regrets Value or ignore it. Honoring it is asking myself if on my deathbed I will regret not investing in an awesome website to promote the business of my dreams. Ignoring my No Regrets Value would mean saving the money, playing it safe, and working on the website myself, knowing that it would probably never be as good without professional help.
- **Aha! Moment Value:** The point at work when I have an opportunity to talk to my boss to let him know that I would like more responsibilities, and that I have an interest in leadership in the workplace. I have a choice to either honor my Aha! Moment Value, which is going after opportunities where I know I can learn new things, or ignore my value and succumb to the fear of rejection or judgment from my boss.

# 13: Motivation Styles

## *Chapter Overview*

*The quality of motivation matters because it sparks action and energizes you to take steps forward when the going gets tough. Understanding specific motivation styles—intrinsic versus conditional, proactive (toward benefit) versus reactive (away from threat), self-interest versus empathetic—helps your client develop a more refined ability and flexibility to employ all styles.*

*The following exercise helps your client become aware of each style and understand why it is important to tap into the different styles at different times. Each style has its own benefits and drawbacks. To continually push potential, we need each style.*

## *Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious, Courageous, Confident, Inspiring*

## *Skill-Check Questions*

*What are the different aspects of motivation?*
*What's useful about each aspect? What are the drawbacks?*
*How can I design action as a way of testing the action plan and the quality of motivation?*

# Motivation Styles

When clients understand distinctions in motivation styles and which motivation styles work best for them, they do not have to rely exclusively on willpower to stay on track. They can start to create systems that support and remind them of different perspectives or reasons to keep moving forward. Having an awareness of motivation styles leads to smarter systems. Let's examine the distinctions between motivation styles, why they work, and how to use them when working with clients.

## What

- **Conditional vs. intrinsic motivation.**

  Intrinsic motivation is experiencing Flow and joy from the activity at hand. It’s doing something for the love of the activity, or for the internal satisfaction you get from doing it, rather than looking for or expecting an external reward in return. Finding intrinsic joy in unpleasant tasks is a superpower that requires focus and mental discipline. It is also a habit and becomes easier to accomplish as clients develop stronger skills to deal with drudgery and adopt a more resourceful, positive attitude. On the other hand, tapping into conditional motivation (i.e., doing something for the sake of the reward at the end of the task) is not necessarily useless. Conditional motivation can be extremely useful to get clients to move quickly. However, in the long run, sustaining conditional motivation requires larger and larger payoffs, or less and less work, for the same reward at the end of the journey.

- **Proactive vs. reactive motivation.**

  Proactive motivation is being motivated in advance based on a positive vision of what you are working toward. It is being motivated toward something beneficial. Reactive motivation is getting in gear because a deadline is staring you in the face and you have to get moving now. It is being motivated away from pain. The benefit of proactive motivation is that it feels good and is more easily sustained in the long run. The drawback is that it’s challenging to spark. Reactive motivation is easier to spark, but harder to sustain in the long run. We need both.

- **Self vs. empathetic motivation.**

  Self-motivation is being motivated for the sake of self. Empathetic motivation is being motivated for the sake of others. Coaches who are looking to build a larger coaching practice experience much more anxiety and fear when they are only motivated for the sake of themselves.

  Tapping into motivation for the sake of others helps us get out of our own way, and it functions similarly to listening empathetically. People are more joyful, more fulfilled, less stressed, and less anxious when working for the benefit of others.

# Why

### A. Creates awareness.

Often, individuals do not realize that there are different motivation styles. Financial, health, and family pressure tends to drive a conditional, reactive, sake-of-self motivation style. Empowering clients with the awareness (and results) of alternative motivation styles is like providing a map to guide them out of the hazy procrastination forest. By stumbling around in the procrastination forest, clients might eventually reach the golden fields of being on top of their work, but having a map makes the journey so much faster and easier.

### B. Develops stamina.

A big part of motivation and accomplishment is having the stamina to stick with frustration and setbacks long enough to experience a breakthrough. So often, clients stop short in taking those next steps because stamina is low. Tapping into alternative motivation styles helps clients manage their energy differently. Like shifting into different gears in a car, leveraging alternative motivation combinations can serve different functions throughout the client's day.

### C. Leads to better results.

Perhaps the biggest reason why motivation styles work so well with clients is that experimenting with different ways to get motivated leads to a resourceful, almost playful, mindset. Any time a client is curious about trying different approaches, you have the opportunity to help your client explore different mindsets as well. The combination of different mindsets and actions is powerful. It can lead to quick results, which demonstrates that the mindsets and actions are working.

# How: Conditional vs. Intrinsic Motivation

Intrinsic motivation seems to be getting all the praise these days. And rightfully so. Tapping into intrinsic motivation—doing something for the sheer joy of doing it—is intertwined with the state of "Flow". Flow exists at the intersection of skill and challenge. It is that blissful experience of being immersed and fully engaged in the present moment.

Conditional motivation, on the other hand, gets the bad reputation of creating more problems than it solves. Conditional motivation is doing something only because the reward or benefit at the end of the task is worth it. It is doing dull administrative work because you want to keep your job or grow your business.

The bottom line is that both intrinsic and conditional motivation are useful and necessary for leading a productive, fulfilled life. When applying conditional and intrinsic motivation to food choice, most people rely on conditional motivation at first. It's tough to make not eating a cookie intrinsically motivating. A client skips the cake because they want to look a certain way once swimsuit season comes around. However, the problem with conditional motivation and food choice is that it tends to run out or lead to a yo-yo pattern. Instead, the opportunity with using intrinsic motivation and food choice is to explore what perspective your client needs to be in to enjoy the state of making optimal decisions. When you can pivot the coaching to go deep enough to include the state of Being, you now have a foundation to make almost any unsavory task at least palatable and maybe even enjoyable. The task is not enjoyed because it is fun; the task is enjoyed because of what it says about you as a person and the characteristics you're employing.

Such a shift helps people grasp a deep truth about procrastination and poor time management decisions. The usual reason not to procrastinate is to get something accomplished. It's all about the end goal in mind. It's not a bad reason, but it does take a fair share of willpower to pluck up the energy to take on the task and hopefully make enough progress to keep you going through completion.

Another deeper reason not to procrastinate is that it feels so good in the moment to know that you are doing the work and making the best choices for yourself at the time. There is a certain joy in doing the most important work. When you are in the moment of doing your life's work, you know it. When you can link food choice to the positive, powerful force of making the most useful decision and doing the most useful work, you've helped your client with an impactful new perspective and tool to use for motivation.

When addressing these concepts in coaching, here are a few guidelines to think about:

1. **Be straightforward.**

   Ask your client when they currently use intrinsic or conditional motivation in their daily life. It is surprising how simply raising awareness in a coaching setting, combined with a coach's demonstrated curiosity, can lead to more insight and inspired action plans.

2. **Use a borrowed perspective from another area of your client's life.**

   Ask your client about an area of life where they easily tap into intrinsic motivation. Help your client define the perspective, recognize the pattern, and pull out details of the experience of being in Flow. Then ask your client to apply that same mindset to another area of their life. The client is borrowing an intrinsic perspective and applying it to another area of their life.

3. **Rely on self-realization.**

   Developing skills and stamina can be intrinsically motivating. It feels good to work hard. Using the challenge to test personal skills and stamina puts the focus and attention on the ability to work rather than on the task at hand. Such a shift can help clients tap into intrinsic motivation by making the skill development the topic, so performing the task just happens to be the playground for building the ability.

4. **Try the 2% experiment.**

   This is my personal favorite. The next time your client is faced with work they're dreading, encourage them to become curious about even 2% joy they may be experiencing when they do that task. Usually clients can find a small element of a subject that is enjoyable. If they can start to look for even little things they like about the work, it can help build more understanding about the task's importance to their short-term and long-term goals. And people like what they understand.

5. **Finally, look for ways to make the work a game.**

   Can I get through all this work by 2 pm? Can I write in my habit tracker each day for two weeks straight? Can I keep up this streak? When clients shift their perspective to make the work a game, they invite the experience of Flow, which most likely taps into intrinsic motivation.

# How: Reactive vs. Proactive Motivation (Motivation Away From vs. Motivation Toward)

“Reactive motivation” is a fancy term for describing the “motivation away from” a particular thing. The difference between being motivated away from something undesired versus being motivated toward something desired is stark. Such a difference shows up in the quality of perspectives and eventual results. Reactive motivation invites a rollercoaster ride, with the dips of slacking off and the peaks of panicked action. It’s the rollercoaster of crash diets followed by "I’ll eat whatever, whenever." When the undesirable state or danger is far away, taking it easy and coasting makes the most sense. However, when the undesired result rears its ugly head, bam - it is time to shift into action! Clients on this rollercoaster bounce between ignoring work and scrambling to keep up. It creates a pattern of bouncing between procrastination and putting out fires. A reactive motivation style can be effective in short bursts, but it leads to stress overload in the long run.

Proactive motivation (or motivation toward) feels great. Tapping into this style consistently is the tricky part. People who tap into proactive motivation do the work ahead of time and work to create systems to solve problems before they come up. The challenge is getting the gumption to do the work well before a deadline looms. One of the hardest parts of proactive motivation is believing that the goal is achievable and can be a reality. So often, goals involve an element of chance. Even if the work is done, a client might not get to the goal. You might not get that promotion or land that paying client, even if you do all the right things and put in the work. Proactive motivation requires focusing on the aspects of a goal within the client’s control, then trusting that if the work is done, the results will eventually follow.

As a coach, your job is to help clients design ways to use both forms of motivation—proactive and reactive—mindfully and intentionally. Below are steps you can take to help your client become more aware of these two types of motivation:

1. **Bring awareness to the mechanics of proactive and reactive motivation.**

   Proactive motivation does not have the steep climbs that are experienced in reactive motivation, but neither does it have the big dips. Often, the simple awareness of the two styles, and the patterns each produces, is enough for clients to start shifting motivation styles.

2. **Use the exercise to further explore the concept of reactive vs. proactive motivation by asking curious questions.**

3. **Move on to the next section, Motivation for the Sake of Self vs. Other, to tie these motivation styles together.**

# How: Self vs. Empathetic Motivation (Motivation for the Sake of Self vs. Other)

This *Motivation Chart* ties all the distinctions of motivation together and adds a third: motivation for the sake of self vs. other. This distinction is designed to get clients thinking empathetically. It requires them to think in terms of the future and the impact they want to have on the world. The exercise aims for clients to tap into being motivated for the sake of something larger than themselves. In terms of food choice, the decision becomes much more about how being healthy and making healthy choices affects others around them.

Being motivated for a larger cause creates a context that gives even mundane tasks a deeper meaning. The main objective of this session is to introduce clients to the concept of taking action for the sake of something larger than themselves. Follow the steps below to work through the *Motivation Chart*.

1. **Identify the outcome your client wants.**

   The more specific, the better. It could be "to get to the gym five times a week" or "to eat according to my plan."

2. **Start in the upper left of the Motivation Chart, asking your client, "What are the negative outcomes that will happen if you do not follow through?"**

   Then shift to the upper right side of the chart, asking, "What are the positive outcomes that will happen if you *do* follow through?" Continue to the bottom left side of the chart, Empathetic-Reactive, asking, "What are the negative outcomes that will happen in the lives of others if you do not follow through?" Then move to the bottom right side of the chart, asking, “What are the positive outcomes that will happen in the lives of others if you do follow through?”

3. **Coach from the topic-rich environment you've created.**

   Ask your client where they want to go next or what insights they have. At the end of the session, it is useful to have an action plan that tests out your client’s new approach to motivation to see what works and what needs to be changed.

| | ***Skipped it*** | ***Did it*** |
|---|---|---|
| *In my life* | | |
| *In the lives of others* | | |
| *In the future (in the lives of people you do not yet know)* | | |

# Team Bonding

## What

Team bonding is feeling connected with your team. Team bonding is a crucial part of healthy company cultures that understand that nurturing relationships with each other is just as important as achieving results. Effective team leaders make time for team bonding.

- **Shared States of Flow.**

  Becoming immersed in an activity where you lose track of time and enjoy the present moment is considered a state of Flow. Flow is a state where you are alert, creative, and relaxed. Being engaged in such a state with a group of people also engaged in the same activity (e.g., a board game) creates a shared state of Flow, which is an important ingredient in team bonding.

- **Different Dimensions of People.**

  While at work, people (hopefully) bring their most professional selves. Part of the magic of team bonding is doing an activity that invites team members to show a different side of themselves. When doing an activity different from the usual grind of work, you allow your team members to show and share different sides of themselves.

- **Challenge.**

  Some systems or objects break when placed under pressure (e.g., a glass of water that's pushed off a table). Other systems, however, thrive and even require setbacks and challenges to grow, learn, and thrive (e.g., a child who is learning how to walk). The best team bonding occurs when there is a shared challenge and teams learn to be patient with setbacks and work together to arrive at solutions.

# Why

### A. Connection.

Teams who feel more connected are more effective because the connections create a company culture that is a safe place to learn, grow, make mistakes, and share ideas without judgment.

### B. Strengths and Vulnerabilities.

Team bonding exercises often expose each other's strengths and vulnerabilities. It is vulnerability that allows us to better connect with each other. Bonded teams often have more empathy and compassion for each other. This leads to them having more effective communication, which then leads to better results.

### C. Deeper Understanding of Ourselves and Others.

We like what - and whom - we understand. Shared activities for the sake of fun and understanding create a deeper understanding of ourselves and those on our team. We tend to like what we understand, and when you understand your teammates better in positive environments, you create an increased sense of trust, and thus bonding, among your teammates.

# How

1. **Become aware of your client's current level of satisfaction regarding how well their team is bonded.**

2. **Look at your client's numbers on the Wheel of Life for Executives in the areas of Connection, Communication, and Culture.**

   Ask, "How do you feel about these numbers? What would a 10 look like in each area?"

3. **Explore your client's current perspectives about team bonding.**

   Honestly reflect on the amount of effort that your client makes to intentionally create time for team building.

4. **Brainstorm ideas for team building exercises.**

   Search for different ideas for team building activities. Organizations such as Toggl, Teambonding, and Slide Karaoke offer many suggestions on activities you can do either remotely or in-person.

5. **Pay attention to Limiting Beliefs that may surface when trying to create time for team building (e.g., there's not enough time, there won't be interest, people will think it's dumb, etc).**

6. **Co-create an action plan of how and when your client will implement team bonding into their company.**

# 14: Future Self

## *Chapter Overview*

*The Future Self is a designed, positive perspective. It is set from the client's point of view, ten or fifteen years in the future. The Future Self is a powerful exercise that helps clients create a habit of positive self-talk and a future-oriented perspective.*
*The Future Self exercise relies heavily on a client's imagination to create an image of themself in the future. This chapter looks at aspects of the Future Self and techniques to help clients tap into its magic.*

## *Essential Coach Qualities Covered*

*Empowering, Confident, Inspired*

## *Skill-Check Questions*

*How can I effectively lead a client through the Future Self visualization?*
*How can I help clients remember to use the exercise between coaching sessions?*

# Future Self

Studies in positive psychology have found that the vast majority of concepts we create about ourselves in the future are extremely optimistic. This kind of outlook is crucial to long-term health.[65] Even during tough times, the Future Self is usually overwhelmingly positive.[66] Our brains are wired to create positive Future Self concepts. It's simply a matter of giving ourselves permission to tap into that wiring and follow our imagination.

The *Future Self* exercise is based on the research on Best Possible Self. Researchers have found that interventions like the Best Possible Self lead to a boost in positive future expectancies, raise and maintain positive mood, bolster well-being, and increase positive affect[67] . The biggest question that emerged from this research was simple, "How?" With researchers spending millions to develop effective psychological interventions, how was something like the Best Possible Self so effective? What the researchers found was having a simple and easy-to-follow exercise helped keep participants motivated. Additionally, when participants continued to engage with the activity regularly, it allowed them to slowly built up their positive affect and mood over time.

Originally created as a writing exercise, the Best Possible Self exercise has been used as a basis for many future-oriented tools, including the *Future Self* exercise. The key benefit of creating a positive Future Self is that clients can get a sense of *who they are going to be* rather than *what they are going to do*. Remember being asked as a child, "What do you want to be when you grow up?" It usually meant, "What job or profession are you going to have when you grow up?" Adults may get asked, "What are your plans this year?" In both scenarios, it has the individual thinking only about actions *(*the *"Doing")* they are going to take in the future without thinking about the Being. The Future Self concept can include a job or profession, but goes beyond that by helping clients get a feeling for the whole person they are striving to become. The Future Self includes all the positive perspectives, experiences, and knowledge that clients have gained throughout the years,

[65] Rutchick, A. M., Slepian, M. L., Reyes, M. O., Pleskus, L. N., & Hershfield, H. E. (2018). Future self-continuity is associated with improved health and increases exercise behavior. *Journal of Experimental Psychology: Applied, 24*(1), 72–80.

[66] Liberman, N., & Trope, Y. (1998). The role of feasibility and desirability considerations in near and distant future decisions: A test of temporal construal theory. Journal of Personality and Social Psychology, 75, 5–18.

[67] Pennebaker, J. W. (1997). Writing about emotional experiences as a therapeutic process. Psychological science, 8(3), 162-166.

which helps clients tap into that inner knowing. A future-oriented and positive perspective is incredibly powerful.

# What

- **Image of who they are going to be.**

  When most clients think of the future, a specific job is often the first thing that comes to mind. Other images might be family, a house, a car, a vacation, etc. The *Future Self* exercise helps clients focus more on character qualities than on careers or possessions. It's not that a career or possessions aren't important, but for this exercise, we want to focus on deeper aspects of a client's life that are not normally addressed.

- **Description.**

  Creating a detailed description of a Future Self adds so much value for your client. A Future Self has specific clothing, a geographic location, a physical description, top values, perspectives, a typical day—essentially all the things that real people have. Your client's job is to create this description using their imagination, aiming for highly vivid details. These details will make the description more useful.

- **Nickname.**

  Creating a nickname that only the coach and the client will use to refer to the Future Self will help distinguish the current perspective from that of the Future Self.

- **Positive perspective.**

  Think back to the *Perspectives* exercise. During that exercise, the coach asks the client to "try on" several perspectives to find the one that is most empowering in a given situation. This Future Self acts as an additional positive perspective to "try on" in challenging situations. It allows the Future Self to offer wisdom to your client from the future.

- **Relationship between present self and Future Self.**

  The Future Self represents a relationship between the client's current default perspective and a perspective that looks back from years in the future. The gap between those perspectives is personified in the relationship between the present-day self and the Future Self.

# Why

### A. Addresses Doing and Being.

Most clients have dreamed of what the future holds, but the *Future Self* exercise takes that to another level by looking at who your client will *be*. By imagining specific characteristics and wisdom gained through the years, your client has a method for directly addressing desired personal growth. You give your client a way to balance dreaming of both the Doing (career) and the Being (personal characteristics).

### B. Paints an optimistic future.

Human beings naturally have an optimistic view of the distant future. The *Future Self* is effective because it gives shape to that natural instinct and makes the future come to life. Positive, future-oriented activities that are simple to follow help increase and maintain motivation toward future goals.

### C. Takes a strong, positive perspective.

Asking the *Future Self* questions is equivalent to taking a strong, positive perspective. It is similar to a *Bird's Eye View*, but instead of looking at life from above, it looks at life from a time in the distant future.

# How

1. **Explain the concept of the Future Self. Provide examples of your own Future Self and perhaps those of other clients (with your previous clients' permission).**

2. **Take a moment to center yourself, and have your client do the same.**

   Have your client take a deep breath, and shake off any remaining thoughts of a previous exercise. Encourage your client to use his or her imagination and to have fun with it. Invite your client to center themself, take a deep breath, and even close their eyes for a few seconds.

3. **Ask your client to imagine a future version of themself ten to fifteen years in the future.**

   You can lead your client through a longer Future Self visualization or ask them to simply imagine their Future Self walking into the coffee shop and having a seat with you. It's helpful to ask questions about:

   - Fashion style
   - Geographic location
   - Description of their home
   - Occupation
   - Typical day
   - Favorite things to do
   - Top values
   - Message to your client
   - Other notes

   NOTE: If your client is having a hard time creating a positive vision of life in the future, gently guide them to create a neutral image while gradually making the details increasingly positive.

4. **Ask your client to create a nickname for their Future Self.**

5. **Ask your client to create a "message to you" that is relevant to their Future Self.**

   You are looking to help your client gain value and take action based on the image of their Future Self. This question can bring up a lot of emotions. Often, Future Selves are very kind and say things like, “Keep working hard.” Sometimes they say, “Get your butt moving!” Whatever the message, it is a great time to use your coaching skills to bring your client to a deeper awareness of how they can take that message and turn it into present-day actions.

6. **Complete the session with some coaching homework, and continue to check in with the Future Self throughout the next few weeks.**

## Sample Questions

Here are some examples of powerful questions about the Future Self. (Ideally, replace the words “Future Self” with the nickname that your client creates.)

- What has your Future Self learned that you have yet to learn?
- When you encounter resistance, what advice does your Future Self have for you?
- What is the biggest challenge that your Future Self encountered between who you are now and who you’ll be then? How did they overcome the challenge?
- What does your Future Self want your present self to know?
- What does your present self want your Future Self to know?
- What hopes and dreams does your Future Self have for you?
- What is the biggest change you need to make in yourself to complete the transformation into your Future Self?
- What can you do today that your Future Self will thank you for?
- What is the most powerful perspective that your Future Self wants you to have?

# 15: Inner Critic

## *Chapter Overview*

*The Inner Critic tool gives coaches an exercise to specifically target negative and debilitating self-talk. Creating a new relationship with the Inner Critic empowers your client, especially if you co-design a plan to manage the negative self-talk when it shows up again.*
*The Inner Critic exercise pairs well with the Future Self exercise, and the two work well in the same session. If you do the Future Self first, then you can use that perspective to help with addressing the Inner Critic. If you decide to do the Inner Critic first, it can act as a way to clear negative self-talk out of the way, allowing the Future Self to fill the gap with a positive mental structure.*

## *Essential Coach Qualities Covered*

*Empowering, Curious, Courageous, Confident*

## *Skill-Check Questions*

*How will I help a client recognize negative self-talk as an Inner Critic and give it an identity?*
*What will it look like when my client has designed a new relationship between themselves and their Inner Critic?*

# Inner Critic

## What

In the early 1990s, psychologist Dr. Richard Schwartz became very curious about a pattern of conversation he was having with patients in therapy. In a large number of sessions, he noticed that patients would refer to different parts within themselves, going as far as to describe this part's thoughts and emotions. Intrigued by the notion of these parts, Dr. Schwartz began to develop the concept of sub-personalities and developed a model of therapy to help address the individual "parts" that exist within our minds. This therapy model is known as Internal Family Systems (IFS) Therapy and has become a popular form of therapy across the US.

Internal Family Systems Therapy identifies three potential roles that our "parts" can take on, though we often have many more than three parts. One of these roles is called the "manager." When operating at optimal levels, managers help keep us safe from harm and provide helpful feedback. When operating at less than optimal levels, however, they can provide critical or even biting feedback that can lead to feelings of doubt or discouragement.

In the coaching world, the voice inside us that churns out negative self-talk is referred to as the Inner Critic. This exercise is a tool used to personify these negative habits, negative self-talk, and negative perspectives in order to take on a new set of more useful habits, dialogue, and perspectives. The exercise is similar to debugging a software program. It takes old, outdated patterns of thought and habit, exposes them, and playfully puts them aside so that the new software can run smoothly.

At the end of the *Inner Critic* process, you will create new ground rules for your client to interact with their Inner Critic.

The *Inner Critic* exercise has three components:

- **Describe negative self-talk.**

  Being able to describe the situation and the content of the negative self-talk is the foundation for this exercise.

- **Imagine the Inner Critic.**

  It takes imagination on the part of the client to personify the negative self-talk into some sort of character, usually a cartoon character or something that corresponds to the self-talk.

- **Manage focus.**

  Once the Inner Critic is personified, the next step is managing focus by building a habit of setting aside the Inner Critic in favor of something more productive.

# Why

### A. Creates distance between the negative self-talk and the client's inner dialogue.

The main reason the *Inner Critic* exercise works so well is that clients begin to recognize that this Inner Critic is not who they are. In Internal Family Systems Therapy, Dr. Schwartz concluded that people are made up of many parts, all separate from the self. In coaching, it's helpful to see the "Self" as the CEO of the client. This Self embodies characteristics like calm, collected, and conscientious. The Inner Critic is one part of the person, but it is NOT a part of the CEO, who is in control. Instead, it is a relic of a message that is no longer needed or useful. The Inner Critic is a part of the client for a reason - it believes that it has (or had) a purpose and feels obligated to continue delivering this message, such as protecting you from pain or embarassment. Once that message is isolated, however, the exercise creates distance between the client and their self-talk. This mental exercise increases the probability that the client will be able to dismiss that negative self-talk and focus on something more positive. Being able to separate the Inner Critic from the client's core personality and what they really want is powerful.

### B. Creates realization of how easy it is to dismiss the negative self-talk.

Once clients have created a gap between themselves and their negative self-talk, it's easier to recognize that negative self-talk can be dismissed. Often, clients discover that they have to recover from and dismiss the Inner Critic numerous times. The habit of recovery is an important part of the process. It helps clients understand that they are not their Inner Critic and that they *do* have power over it. It is empowering for clients to learn that they have the choice either to listen to their Inner Critic or to focus on something more useful, like their Future Self.

**C. Is silly.**

The exercise is a little silly and outside of what most clients have experienced. This silliness is one of the strengths of the exercise and why it works so well. Turning negative self-talk into a personified character brings an element of playfulness to the process. Such playfulness is useful in helping a client address issues that may be heavy or difficult.

# How

1. **Take a little time setting up the atmosphere of the coaching session.**

   Scope out the room, especially if you are in a coffee shop, to make sure that you are in a good spot for the coaching session to be relatively uninterrupted.

2. **Take an extra minute to establish a great connection with your client.**

   Invite your client to stretch their imagination with this exercise. Invite them to have fun, and remind them to let go of judgment of themselves and of the exercise itself.

3. **Explain the concept of the Inner Critic.**

   It can be helpful to use the analogy of a software update to explain how the Inner Critic is the personification of negative patterns so that your client can learn new habits.

4. **Give a few examples of your own Inner Critic or the Inner Critic of other clients with whom you have worked.**

   [Make sure you obtain former clients' permission to share first and do not reveal their name or other identifying characteristics.]

5. **Ask your client about an area where things are not going so well or a time during the day when they usually have a hard time.**

   Ask specifically, “What kinds of things do you say to yourself when you’re frustrated?” or “What kinds of things do you picture?” or “What do you say to yourself when things are not going well?”

6. **Explore the negative self-talk and perspectives.**

   In your notes, write down the specific words your client uses.

7. **Repeat the specific words used, and ask, “What do you think about a person who [fill in the negative pattern your client used]?”**

   Keep following the thread down into the negative stuff until you feel you have reached the kernel of the negative pattern. You have found the bug, and now it is time to debug the system.

8. **Ask your client, “If a little creature or being was to express that message to you, what would it look like?”**

   I often use the word “little” here on purpose to keep the Inner Critic tame. Sometimes, however, an Inner Critic is not little. Use your intuition and coaching skills to shift the internal message (that may be very close to your client’s negative self-concept) to a personified character that can be easily overcome. Take your time. This step is the crux of the *Inner Critic* work!

9. **Once you have the beginnings of the Inner Critic sketched out, ask your client detailed questions to create a clear image of what the Inner Critic looks like and what it wants.**

10. **Ask your client to name this Inner Critic.**

11. **Keep the Inner Critic tame, small, and cartoonish.**

    Tame Inner Critics get the job done and avoid the danger of creating an intense negative mental construct. Cartoon characters, small creatures, or funny-dressed people work well for Inner Critics.

12. **After you have filled out the description, ask your client to put their Inner Critic on the other side of the table, or perhaps further away, on the other side of the room.**

    You may need to encourage your client to use their imagination and have fun with the process. Put the Inner Critic underground or in a cave.

13. **Facilitate a discussion between your client and their Inner Critic, exploring and creating a new way for your client to relate to their Inner Critic.**

    The following offers some guidelines for laying out the new ground rules for the Inner Critic.

## Guidelines for New Ground Rules

Creating new ground rules for the Inner Critic is the software update. You are creating a new relationship between your client and their negative self-talk. This process has a few guidelines:

- The new rules give your client the power to dismiss their Inner Critic at will or more intentionally consider the relevance of the Inner Critic's message.
- After your client tells their Inner Critic the new ground rules, their Inner Critic may balk, argue, throw a fit, etc. The point is to envision how their Inner Critic will react when your client tells it that it is no longer in charge. It does not matter how the Inner Critic will react. Your client is not to engage, but rather simply to distract the Inner Critic with milk and cookies (or some other creative distraction), and get on with life!
- The new ground rules can be silly and fun.

Here are some powerful questions about the Inner Critic: (Ideally, replace the words “Inner Critic” with the nickname that your client creates.)

- When does your Inner Critic show up most often?
- What is its mission?
- What does your Inner Critic want for you?
- What do you want your Inner Critic to know?

# 16: Leadership & Feedback

*Chapter Overview*

*Gathering feedback is an essential part of leadership growth. This chapter uses Core Motivation as a tool to design targeted questions to elicit useful feedback. This chapter continues with a small handful of coaching strategies that are useful to have in a coach's toolbox. Helping client's craft or use metaphors is excellent for addressing a client's Being and Learning. Bird's-Eye View, Reframe, and Challenge are all quick coaching tools to help clients see themselves or the situation from a different perspective.*

*Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious*

*Skill-Check Questions*

*What are effective strategies for gathering useful feedback?*
*How can I use feedback in a coaching setting?*
*How does metaphor help address a client's Being and Learning?*
*When is Bird's-Eye View and Reframe best used?*
*Why is Challenge a helpful tool when a client is designing action steps?*

# Leadership & Feedback

Strengths-based development in life coaching isn't as easy as sitting down with our clients and making lists of strengths and weaknesses. It requires looking deeply at our clients' talents and improvement areas, eliciting feedback from others, and staying curious about the process. However, this process is usually a challenging one, and it requires a substantial amount of vulnerability and trust from your client.

Collecting feedback - especially meaningful and intentional feedback - can be a tricky process. On one hand, feedback helps us grow and develop into better versions of ourselves. On the other hand, feedback can sometimes feel threatening and impact the way we see our identity. This is why it's crucial to ensure that you design a carefully crafted alliance around how your client would like to receive feedback, especially as it pertains to exercises like the one below.

Once you've discussed a plan for how your client will receive feedback, you can dive into the 360-Degree Feedback exercise. This exercise uses strengths from the Core Motivation tool used in Chapter 4 of this book. However, feel free to draw from any strength's program such as Gallup's StrengthsFinder[68] or Peterson's *Character Strengths and Virtues.*[69]

## What

360-Degree Feedback surveys or assessments allow the client to better understand their leadership effectiveness by learning how others view them. These surveys consist of questions for the client's team members to answer. These answers can help the client increase awareness of their strengths, weaknesses, and personal and professional growth opportunities. The surveys are called "360-Degree" because they aim to gather feedback from a variety of points of view: from peers, supervisors, direct reports, and even customers and vendors. The survey responses are almost always kept anonymous, and they should be gathered by a third party like a coach or consultant.

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[68] Rath, Tom. 2007. *StrengthsFinder 2.0.* Gallup Press: New York, NY.

[69] Peterson, Christopher, and Martin E. P. Seligman. 2004. *Character strengths and virtues: a handbook and classification.* Washington, DC: American Psychological Association.

- **Purpose and intention.**

  All parties involved in this feedback process must be clear that its purpose is to help the client learn and improve. The process works best from the "growth mindset" perspective. Although the process can produce some resistance and nerves from both the client and evaluators, it can be a very enlightening and positive experience when it is clearly understood that the intention is for positive growth rather than punitive measures.

- **The Client.**

  Whether the client enrolls themself in the process voluntarily, or the 360-Degree Feedback process is a standard practice in the company, it is important that the client makes the decision to go through the process with a growth mindset. Since the client usually chooses their evaluators (sometimes they may be given categories of people to choose from, such as supervisors, peers, direct reports, etc.), the client should choose those who will offer a vast array of viewpoints so the client can get a holistic view of their abilities. The client must keep in mind that they should choose honest evaluators who will keep their best interest at heart to help with learning and growth.

- **The Evaluators.**

  The client should choose the evaluators, though those at smaller companies (say fifteen or less) may want to include everyone in the process for a holistic look at their performance. The evaluators play a vital role in the 360-Degree Feedback process, and they will help the client learn how they are viewed from many different perspectives. The responses should be anonymous to allow the evaluators to be honest with what they feel are the client's biggest strengths and growth opportunities. While evaluators are encouraged to be honest, even brutally honest, if necessary, their feedback must come from a good intention to help the client grow, rather than from an intention to retaliate, embarrass, shame, or punish the client.

- **The Process.**

  When all parties understand the purpose and intention of the 360-Degree Feedback process, then the client can give their evaluators the survey. The responses usually go to a third party, like a coach or consultant. Then, the coach meets with the client to review the findings to increase awareness, generate learning, and design a development plan.

# Why

**A. Increases client’s self-awareness.**

The 360-Degree Feedback process allows clients to compare their perception of themselves with others' perceptions of them. Surveys provide clients feedback on their strengths and opportunities for growth.

**B. Explores client’s relationship with feedback.**

The 360-Degree Feedback process allows coaches to explore how their clients receive both positive and negative feedback. In addition, the process allows coaches an opportunity to explore their own comfort level of sharing their clients’ results, both positive and negative.

**C. Provides a catalyst for lasting change.**

The increased awareness created from the 360-Degree Feedback process provides crucial information that serves as a foundation for change. This can lead to tangible action steps that the client can take to become a more effective leader at work and at home.

# How

1. **Confirm client's Core Motivation type prior to sending 360-Degree Feedback surveys to evaluators.**

2. **Introduce client to the idea of doing a 360-Degree Feedback survey.**

3. **Notice client's reaction.**

   Ask powerful questions about your client's feelings about a 360-Degree Feedback assessment.

4. **Co-create the survey in Google Forms (or another survey site). Since there will be specific questions based on that client's Core Motivation type, create a separate Google Form for each client being evaluated.**

   (We will review how to make a survey using the template below as an example.)

5. **Have the client pick 5-10 people to complete the 360-Degree Feedback survey who are familiar with their work ethic, leadership efforts, and personality.**

6. **Decide on a deadline for surveys to be completed.**

   Usually within 2 weeks is good.

7. **Collect the survey responses.**

   Survey responses come to the coach.

8. **Compile the responses anonymously into a separate document.**

9. **Share feedback based on the way you designed your alliance before the feedback process.**

   If they want the feedback before your meeting, send a day or two ahead. If not, you can review the results with them during a coaching session.

10. **Ask the client to think about which parts of the feedback they agree with and which parts cause resistance or discomfort.**

11. **At the next coaching session, coach around the feedback.**

12. **Create a developmental action plan to move closer to whom the client wants to become.**

# Questions Based on Core Motivation

When your clients are more aware of how their Core Motivation type affects their work, their leadership, and others' perception of them, they can be more aware of which strengths to leverage and which weaknesses to manage. Here are the steps in this process:

1. **Create a 360-Degree Feedback Survey on Google Forms.**

   You will create a separate survey for each client based on the client's Core Motivation type.

2. **The first question should be: "Your relationship to the client." (e.g., supervisor, peer, direct report, customer, etc.).**

3. **Include five feedback questions.**

   Among the five questions, choose three questions from the "General Questions" list below, and choose two questions under the client's Core Motivation types below. Make sure that the questions address both strengths and areas of improvement.

4. **The client does <u>not</u> need to inform their evaluators of their Core Motivation type.**

## General Questions (Pick 3)

### What is this person's greatest leadership asset, skill, or talent? What suggestions do you have for leveraging this strength?

- What is this person's greatest leadership challenge or area of development? What suggestions do you have for handling this?
- How would you describe this person's leadership style?
- How does this person make you feel?
- How would you describe this person's energy?

- What metaphor best describes this person?
- In your opinion, how may this person's greatest strength turn into a weakness?
- In your opinion, how may this person's greatest weakness turn into a strength?
- What potential do you see in this person?
- How do you think this person gets in their own way?
- Is there any additional feedback that you'd like to provide to this person that may not have been previously addressed in this assessment?

# The Core Motivation Questions (Pick 2)

### Type One: The Perfectionist

- How skilled is this person at giving constructive feedback?
- How does this person manage flexibility?
- How is this person with mistakes, errors, and spontaneity?
- How may this person's "wanting things to be right or perfect" affect others?
- How is this person with understanding and empathy?

### Type Two: The Helper

- How is this person with understanding and empathy?
- How is this person with having their own needs met?
- How is this person with setting boundaries?
- How does this person engage with their emotions?
- How does this person deal with feedback?

### Type Three: The Doer

- How is this person with failure?

- How does this person deal with inefficiency?
- How is this person with their emotions and vulnerability?
- How does this person deal with feedback?
- How is this person's balance between task and connection to others?

### Type Four: The Artist

- How is this person with taking action?
- How is this person with their emotions?
- How does this person deal with the ordinary?
- How does this person deal with adversity?
- How is this person's balance between achieving results and connecting to others?

### Type Five: The Thinker

- How is this person with taking action?
- How is this person with their emotions?
- How well does this person deal with needing to know more?
- How is this person with wanting to be right?
- How is this person's balance between seeking knowledge and connecting to others?

### Type Six: The Friend

- How is this person with learning about new ideas, situations, and/or people?
- How is this person with their emotions?
- How is this person when it comes to trust?
- How is this person with taking risks?
- How is this person's balance between thinking about positive outcomes versus negative outcomes?

## Type Seven: The Optimist

- How is this person with follow-through on projects?
- How is this person with mundane tasks?
- How is this person with staying engaged in hard conversations and situations?
- How is this person with being focused and present in the moment?
- How does this person deal with feedback?

## Type Eight: The Defender

- How is this person with delegation and trusting others to do things differently?
- How is this person with emotions and vulnerability?
- How is this person with compassion and empathy?
- How is this person as a team player?
- How does this person deal with feedback?

## Type Nine: The Peacemaker

- How is this person with taking initiative and being proactive?
- How is this person with their emotions?
- How is this person when dealing with conflict and/or confrontation?
- How is this person when dealing with change?
- How effective is this person at balancing their own desires with the desires of others?

# Sample Template 360-Degree Feedback Form

(Example: The first three questions are from the General Questions list and the last two questions are from the Core Motivation list. This person is a Core Motivation Type 8).

**Title:** Executive Coaching 360-Degree Feedback for [NAME OF PERSON BEING EVALUATED]

- Please indicate your relationship to this person:

- What is this person's greatest leadership asset, skill, or talent? What suggestions do you have for leveraging this strength?

- What is this person's greatest leadership challenge or area of development? What suggestions do you have for handling this?

- How is this person with delegation and trusting others to do things differently?

- How is this person with emotions, vulnerability, and expressing their own weaknesses?

- How is this person as a team player?

# Metaphor

## What

Using a metaphor creates an image in the client's mind that captures an important thought, making it more memorable and valuable. An outstanding metaphor can help the client wrap their mind around something that may have been difficult for them to understand. When a coach tries to explain something difficult, a metaphor helps the client take that first step toward understanding. The three elements of using a metaphor are:

- **The object or action.**

  An understanding of the original object or action the client is describing.

- **Imagination.**

  Employing imagination to use something as a symbol for that original object.

- **Invitation to the client to make it their own.**

  Perhaps your client can think of a better metaphor for the issue at hand.

## Why

### A. Captures a thought that is difficult to express.

Metaphors can express a thought that is otherwise a challenge to express. Even if you or your client state a metaphor that doesn't quite capture the idea, it usually moves the conversation forward and makes it more likely that your client will land on a metaphor that works.

### B. Is easy to remember.

Metaphors are often easy to remember, can carry deep meaning, and have the potential to stay with a client for years.

**C. Uses the imagination.**

Metaphors help clients flex their imagination and think about their situation differently. When a coach asks the client to make the metaphor fit them specifically, the coach also opens up the possibility for the client to further enhance the metaphor and tap into their creativity.

# How

1. **Trust yourself.**
2. **Create a metaphor using your creativity and intuition.**
3. **Invite your client to make it their own by asking if the metaphor fits, and if not, what they would change to make it work.**
4. **Follow up with powerful questions to ensure that you are back in Level 2 listening.**

# Sample Questions about Metaphors:

- What metaphor would describe the transformation that you're experiencing right now?
- In your life's journey, what animal are you right now, and what animal do you hope to become?
- If your life was a book in three chapters, and chapter one describes where you were, chapter two describes where you are now, and chapter three describes where you're going, what would the title and summaries be of each chapter?
- What metaphor could represent the challenges you're facing?
- What metaphor could represent what it will be like when you achieve your goals?

# Bird’s Eye View

## What

- **Big picture perspective.**

  The *Bird’s Eye View* is the act of pulling the client’s perspective up into the sky to look at the situation from further away. Essentially, it is a pre-determined, bigger-picture perspective.

- **Reset button.**

  Sometimes a client can get caught up in the details of a story, or a particular perspective might sink in. The *Bird's Eye View* acts as a reset button during a coaching session, helping both you and your client take a step back to reevaluate the progress made and choose a new direction to take.

## Why

A. **Provides clarity.**

Sometimes when a client gets so tied up in irrelevant details, pulling back and getting a larger-picture perspective shines a light on what is really important.

B. **Speeds up the process.**

The *Bird’s Eye View* is a ready-made perspective. A coach or a client does not have to go through the whole process of generating different perspectives. The *Bird’s Eye View* is ready to go out of the box.

C. **Provides an opportunity to step back and reassess.**

If a coach does not know where to go with the next question, asking your client to take a step back from the situation is an opportunity to shake up the perspective. The *Bird’s Eye*

*View* is an effective change-up and often provides insight into where to take the coaching session.

# How

1. **Recognize the *Bird's Eye View's value,* and decide that now would be a great time to pull back and ask questions from a larger perspective.**

   The *Bird's Eye View* is especially beneficial if you feel the client is constricted or overly tied up in details.

2. **Direct your client to take a Bird's Eye View.**

   "For a moment, let's take a Bird's Eye View. If you were to look down on this situation from far up in the sky, what would occur to you?"

3. **Follow up with questions that maintain the perspective:**

   - What does your life look like from such a distant perspective?
   - What seems to be the most important aspect?
   - What would you most like to change? Why?
   - What are you most thankful for?
   - What is most surprising from this perspective?

# Reframing

## What

- **Quick perspective shift.**

  Reframing is the art of expressing an event or a concept from a different perspective. The coach takes what a client may consider a setback or something inconsequential and provides a different—and sometimes radical—perspective shift.

- **Client's original perspective.**

  Reframing is useful when your client just said something that stands out to you as a limiting belief or disempowering perspective. Clearly identifying the original perspective in your mind helps you flip your client's thinking when using reframing. Sometimes you can clearly define the original, limiting view, then reframe. Other times, you can just go straight for reframing. It depends on what you think would be most useful for your client.

- **Different twist.**

  A quick, direct statement that includes the perspective shift is the key to effective reframing. You use many of the same words your client just said, but with a different twist that invites the client to consider a new perspective.

- **Curiosity.**

  By asking what your client thinks of the reframed perspective, you ensure that you continue to partner with your client in co-creating the session. It's important to refrain from trying to get your client to adopt the reframing simply because you think it would be useful.

# Why

### A. Provides a fresh perspective.

Reframing is an important skill in life coaching because it helps clients get to a fresh perspective quickly. This influences their attitude, as well as possible actions. Because it offers a different point of view, reframing can almost immediately short-circuit a useless cycle of self-criticism.

### B. Is elegant and efficient.

One of the reasons why reframing can be so effective is its efficiency in elegantly changing a perspective. This tool serves as a shortcut through the more extended *Perspectives* exercise. Because it is shorter, it can easily be combined with other life coaching tools.

# How

1. **Start with the original idea that you think would be beneficial to reframe.**

   It could be a limiting belief. It could be an accomplishment underplayed. It could be an accomplishment overplayed. Something usually stands out to you as a moment or a statement that could be useful for your client.

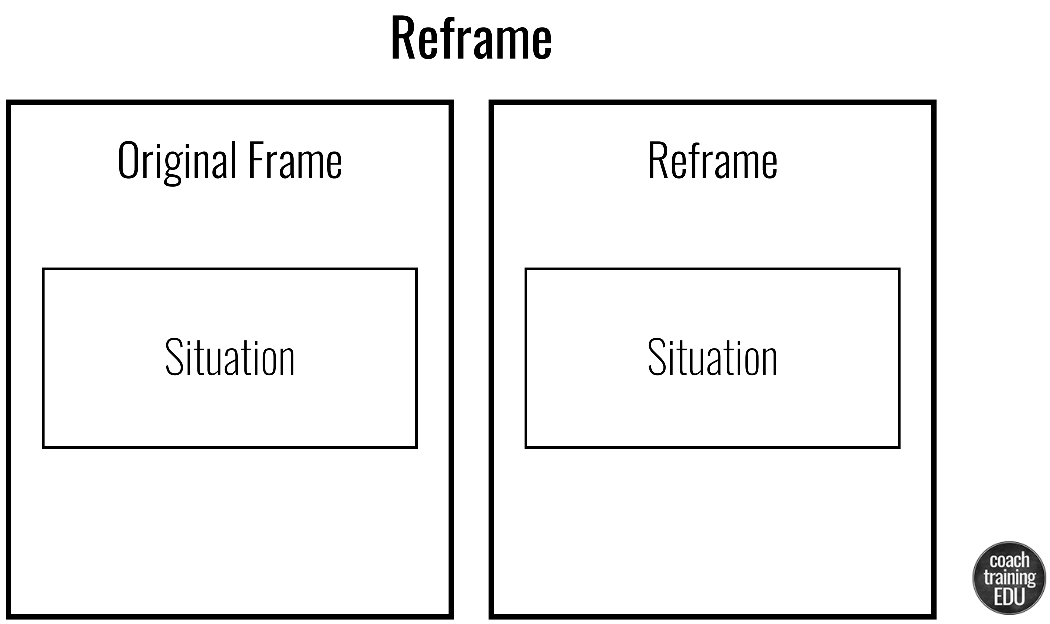
2. **Use a short, direct statement that reframes what your client just said.**

   The key is to be quick and direct.

3. **If the insight and reframe is deeply meaningful to your client, you could opt to use the Reframe Chart that follows.**

   The chart has an area where you can write the old belief and situation and an alternative, reframed belief and new situation.

4. **Follow up with a simple question about your client's thoughts about the reframe.**



# Challenge

## What

"Challenge" is one of my favorite coaching tools. It is closely related to the championing tool, and the two used together can be highly effective. However, both tools are best used sparingly. If used too often, life coaching sessions can feel like intimidating, to-do-list-generating conversations. Used mindfully, Challenge is an elegant tool that busts limiting beliefs quickly and inspires clients to take bolder actions than previously considered.

Elements of Challenge:

- **Bold question.**

  A challenge is a question that boldly assumes your client can achieve something well beyond what they previously considered. For example, if your client has a goal of contacting three people in the next week to work on some community leadership practice, you could ask your client what it would be like to contact twenty people.

- **Busting previous boundaries.**

  Challenging is a process that busts previous boundaries. Helping your client dream and imagine what it would be like to push themself further than ever before is an important element in an effective challenge. By focusing on your client's ability and the assumptions your client is making, you can address their Learning, which leads to valuable insights.

- **Counteroffer.**

  The bold question pushes the boundaries of what your client thought was possible. Sometimes clients accept the challenge at face value. However, clients often balk at the suggestion and come back with a flat-out "no" or their own counteroffer. The counteroffer stage provides the chance to explore assumptions, details, well-designed actions, and the nitty-gritty of what it will take to accomplish the desired outcome.

- **Continued curiosity.**

  Whether or not your client takes the challenge is not as important as your continued curiosity as a coach. An effective challenge can have a profound effect on your client's thinking and emotions. It is helpful not to be attached to whether or not your client accepts your challenge but rather to stay curious and in coaching mode. Let the tool do the work for you as your client wrestles with assumptions, dreams, and committing to ambitious accountabilities.

# Why

**A. Discovers boundaries.**

Part of what makes Challenge effective is its ability to uncover the boundaries of what a client thinks is possible. Clients often respond to a challenge with disbelief, but their limits of what they think is possible have been expanded. Most clients reject a challenge at first. (If they do not, the challenge is likely not big enough.) In response, most clients respond with an action smaller than the challenge, but bolder than they would have considered initially.

**B. Expands the brainstorming process.**

A client may not accept the coach's original challenge, but may come up with an equally grand action.

**C. Underscores the coach's belief in the client.**

A challenge points to the coach's belief in the client's capabilities.

**D. Pushes the client out of their comfort zone.**

For clients to grow, they need to take risks and try new things.

**E. Plays into a client's personality strengths.**

A challenge is exciting, and depending on the client's Core Motivation type, a challenge can be a boom to their excitement level.

# How

1. **While listening to your client describe the action they are going to take, think about what action could be four or five levels bigger.**

2. **Ask permission, or simply jump to your challenge.**

3. **Pay close attention to your client's reaction. Disbelief? Curiosity? Excitement?**

   Stay in Level 2 listening. Resist the temptation to go to Level 1 listening.

4. **Follow up by asking your client if they want to take a different action.**

   If your client does not want to meet the challenge, what steps are they excited to take?

5. **Ask powerful questions to explore any limiting beliefs or your client's assumptions about previous boundaries.**

6. **Help your client create well-designed actions and accountabilities.**

# 17: Setting Reminders

### *Chapter Overview*

*This chapter looks at a coaching exercise that helps clients lock in Learning and design a way to remember crucial insights between coaching sessions. It also addresses two coaching tools: Paraphrasing and Championing.*

### *Essential Coach Qualities Covered*

*Empowering, Curious, Courageous, Confident*

### *Skill-Check Questions*

*What are the steps to Setting a Reminder with a client?*
*What helps make association work?*
*When are Paraphrase and Championing best used as coaching tools?*

# Setting Reminders

*Setting Reminders* leverages the systems and structures philosophy and applies it to the inner world of thought and emotion. A successful reminder is a structure to help your client recover quickly and, for example, choose a powerful perspective or a value to honor. With this exercise, you help your client associate a body movement, specific word, image, color—or something a little unusual so that it's remembered easily—with a chosen perspective that your client will use at a crucial decision point. By creating this association, you have helped your client create a powerful reminder that calls forth internal resources when most needed.

## What

- **Desired mindset.**

  The desired mindset is the concept, empowering belief, or perspective that your client wants to bring to mind when needed.

- **Reminder.**

  The most useful reminders are typically simple, such as applying a little bit of pressure on your hand or a subtle hand movement.

- **Association.**

  *Setting Reminders* involves asking your client to associate the desired mindset with a reminder, such as the aforementioned pressure on the hand or a subtle hand movement. To help your client associate the mindset and the reminder, you will lead your client through exploring past memories when the mindset was present, as well as imagine future situations when your client will use the reminder to evoke the mindset.

- **Break state.**

  The purpose of the break state is to get your client thinking of something completely unrelated to the desired mindset or reminder. You will use a break state between association and testing the reminder to see if the association was successful.

- **Testing the reminder.**

  Testing the reminder is asking your client to perform the hand motion to determine the degree to which it brings back the desired mindset. (Most times, when clients do their hand motion, they smile if the association worked.) In association, you ask your client to think of the desired mindset first and then do the hand motion. Testing and using the reminder works in the opposite direction. If it works, the hand motion will evoke the desired mindset.

# Why

### A. Provides clarity and value.

The first step, clarifying the specific concept your client wants to be reminded, provides value for your client. It helps create a focal point for the next two weeks and beyond.

### B. Stimulates conscious association.

Simple Pavlovian association is a powerful force in human (and animal) nature. Most of the time, association happens unconsciously. In this exercise, we make the associative process conscious. Like all associations, the process works best if it is used often and reinforced.

# How

1. **Identify a perspective your client needs to be reminded of when things get hard, OR a future point when such a perspective will be most needed.**

2. **Enrich that perspective by asking questions like:**

   "If your perspective had a feeling, what would that feeling be?" "If it had a color, what color would it be?" "Remember a time in your life when you've felt this perspective. What was going on?" "In this perspective, what kinds of things do you say to yourself?" Use your coaching skills to draw out the perspective and make it more vivid.

3. **Make up some word, image, or body movement to associate with the perspective.**

   One favorite is applying a little pressure on the part of the hand between the thumb and index finger.

4. **Invite your client to relax as you help them associate the chosen perspective, with all of its richness, to the specific word, image, or body movement.**

   You can combine associations to link to the chosen perspective.

5. **Ask your client to describe the perspective.**

   Just at the peak of emotion, or when you sense your client is really in the perspective, ask them to make the association (e.g., apply a little more pressure to the hand or think of the word or color). Whatever the reminder is, invoke it a few times while your client talks about the perspective and the desired experience.

6. **Repeat the previous step a few times.**

   Repeat the reminder as you lead your client through visualizations, associating the reminder with the perspective.

7. **Test the reminder.**

   Explain that you are going to ask your client about something completely different. Then invoke the reminder to see if the reminder is linked to the perspective. (This is called a "break state.") Ask your client to think about something completely different, like their address or ZIP code.

8. **Ask your client to use the reminder.**

   See if it brings back all the other images and sensations of the chosen perspective, or whatever your client wanted to remember. If it does, good. You've successfully set a reminder! If it doesn't, repeat the process. Sometimes you'll go through the process two or three times. It's perfectly fine and normal to have to repeat the process a few times.

9. **Ask your client to use their reminder once a day for the next week or two.**

   The more they use the reminder, the stronger and more useful it becomes.

# Paraphrase

## What

- **Reflection.**

  Paraphrase is repeating back the words your client just used for the sake of your client's reflection. Reflection allows your client to think more deeply about what they just said.

- **Brief.**

  This tool is most effective when the paraphrase is brief, not a long rehashing of a story or a point for the benefit of the coach's understanding. Your understanding as a coach is simply not that important. What is important is continuing to ask powerful questions that get your client to consider new ideas and break new ground. Frequent, lengthy paraphrasing mimics counseling and gets in the way of truly partnering with your client in a coaching session. The key to effective paraphrasing is keeping it brief.

- **Pause.**

  An important aspect of paraphrasing is pausing afterward to allow your client time to reflect and consider what you just said. A few words of reflection and paraphrase followed by a mindful pause can profoundly affect a client.

## Why

**A. Shifts the perspective.**

One of the most effective uses of paraphrase is saying the words from a slightly different point of view. By using different words, a coach shifts the perspective so that the client can see things a little differently. That difference may lead to a shift in the client's thinking, eventually leading to great insights. Paraphrase is one method of reframing a situation.

**B. Provides clarity.**

Paraphrase is also effective because it gives the client a chance to clarify exactly what they are thinking. The client's words are the most important. By paraphrasing, a coach offers the opportunity for the client to either take the coach's words and run with them or change them to words that the client can fully own. Paraphrase also gives the coach the opportunity to clearly understand what the client is saying.

# How

1. **Listen carefully to what your client is saying. Pick up on individual words and comprehend the larger meaning.**

2. **With a mixture of intuition and curiosity, rephrase what your client has said, adding a slight reframe or a subtle shift in the point of view.**

3. **Be open to your client paraphrasing your paraphrase.**

   At its best, paraphrase opens a new direction of exploration for you and your client.

# Championing

## What

To “reach one’s full potential” may be overused in life, but the meaning is clear: clients have talents and possibilities for the future that far outpace their current idea of what they think is possible. To "Champion" is to help the client close the gap between their current situation and the reality that exists just beyond the next push.

- **Direct statement.**

  Championing a client means that the coach is directing attention to a client’s potential, especially when the client is stuck in self-doubt.

- **A resourceful perspective.**

  Working with your client from the perspective that they have all the inner and outer resources to accomplish their desired outcomes is a fundamental part of being an effective life coach. By adopting such a powerful perspective, your client implicitly (or explicitly if you speak to it when Designing the Alliance) adopts the same perspective. Championing serves as a reminder of the resourceful perspective.

- **A coach’s trust.**

  Championing also involves you completely trusting your client’s ability to accomplish the chosen task. Your trust as a coach is an important part of the recipe of what makes championing effective.

## Why

**A. Acts like a mirror.**

Sometimes a client has a hard time seeing themself and their potential. Showing the client how they appear to others, and their capabilities is a priceless tool.

**B. Exposes limiting beliefs.**

In the process of working through several action steps, a client often confronts some limiting beliefs. A coach must pay close attention to the response that the client provides after being championed. Sometimes clients respond with a limiting belief, which is a wonderful opportunity to expose that limiting belief to help the client move forward.

**C. Serves as a reminder.**

At its best, championing acts as a reminder that the client can achieve their desired outcomes. Instead of facing one, big, insurmountable mountain, the coach helps the client see that the situation is a series of small, but surmountable, hills of challenging tasks.

**D. Feels great.**

Championing feels great. Having someone champion us feels good. It reminds the client that the coach is someone who believes in them.

# How

The best Championing comes from a genuine vision of who your client is and what their capabilities are. Championing is a tool that adds strength to your coaching. Powerful questions, risk-taking, challenging, and other coaching tools really stretch and push your client. Championing reassures your client that they can achieve their desired outcomes.

1. **Determine where your client needs to go.**

   Recognize that there is a gap in your client's beliefs about themself, their self-image, and their perception of their personal abilities.

2. **Gain clarity on the action steps that your client is willing—and really wants—to take.**

3. **Share with your client the strengths, positive characteristics, and capabilities you observe in them.**

4. **Pay close attention to your client's reaction.**

   Listen for any limiting beliefs or evidence that your words resonated with them.

5. **Ask a powerful question, and continue on with the coaching.**

# Company Rituals

## What

Rituals can range from the religious to the personal, from a sports team end-of-practice routine to a weekly family game night. Company rituals are opportunities to drive company culture and reinforce the organization's values. Companies can create rituals around any number of events, such as opening a morning meeting, sharing meals, storytelling, celebrating, welcoming a new employee, or closing a sale.

- **Intention.**

  Rituals differ from systems in that rituals are not about efficiency but about creating fun and engaging ways to honor the company values and create a shared experience among team members. Sports teams thrive on rituals at all stages, from practice to pregame and post-game rituals designed to get the team into a state of Flow.

- **Members of a Group.**

  Company rituals involve groups of people. One of the most powerful elements of a ritual involves its ability to create a sense of belonging by understanding the meaning of what is happening, as opposed to looking in from the outside in bewilderment.

- **A Procedure.**

  A ritual involves a series of coordinated movements. It can be as simple as ringing a bell to signal the beginning or end of a trading session or as complex as an hour-long opening night ceremony at an annual corporate retreat.

- **A Specific Time and Setting.**

  Rituals start at the same time, at known intervals ranging from each day to annually. They also occur at predictable locations, such as at a company retreat center or in a specific conference room.

# Why

### A. Builds a Sense of Belonging.

One of the defining features of a ritual is that members understand and know what happens next, while outsiders are left in the dark.

### B. Instills a Shared Purpose.

Company rituals are important because they engage people around things that are the most important to an organization. This instills a sense of shared experience and purpose. Company rituals are a living embodiment of the company values.

### C. Invokes a Specific Feeling or Mental/Emotional State.

Redesigning a ritual with a specific target mental and emotional state helps to mindfully have an impact on company culture.

# How

1. **Introduce your client to the idea of company rituals.**

2. **Share some examples of company rituals that well-known companies have created, rituals you have, or rituals you have helped your clients create. (Be sure to obtain your client's permission to share.)**

   For example:

   - Employees at Google wear the "Noogler" hat.
   - New hires at Starbucks participate in a ritual tasting of their store manager's favorite coffees.
   - Team members at Etsy share a communal lunch called "Eatsy."

3. **Explore your client's intention for their team.**

   Gain clarity on what feeling, mental/emotional state, and culture your client wants to create.

4. **Identify the time and place where your client wants to add the ritual.**

5. **Brainstorm ideas.**

6. **Make a plan to enlist others.**

Try out the ideas to see which gain traction.

# 18: Future Pacing

### *Chapter Overview*

*Imagination is a powerful tool to help clients visualize the key action steps they need to take during a coaching session to increase their insights and to follow through on their planned actions between coaching sessions. This chapter also explores the Jet Lag exercise to help clients apply an insight to all other areas of their lives.*

### *Essential Coach Qualities Covered*

*Curiosity, Inspiring*

### *Skill-Check Questions*

*What are the steps to the Future Pacing exercise?*
*How does the metaphor of jet lag apply to an insight and to the client's life?*

# Future Pacing

The idea behind *Future Pacing* is to create a vision of the future when your client makes that new and different choice. Hanging out with the daydream and adding detail to it make it really have the potential to evoke more emotion instead of simply completing an intellectual exercise, such as integrating a value into a system. Imagining into this space significantly boosts the chances that your client will follow through with action.

Your job is to guide your client in visualizing what life will be like when they honor their values, follow through with action, and achieve a desired outcome.

## What

- **Visualizing a specific action.**

  From the *Values* exercise, your client will have a specific action in mind that they want to take. *Future Pacing* requires that your client visualize what it will be like to follow through on that action based on a newly clarified value.

- **Next day to two-week timeline.**

  One of the major differences between *Future Pacing* and *Future Self* is the timeline associated with each exercise. *Future Pacing* usually focuses on an action coming up quickly, either the next day or in the next week or two. In contrast, *Future Self* is a visualization exercise focused on jumping forward to the next decade.

## Why

**A. Primes follow-through.**

*Future Pacing* makes following through on an action more likely because it primes your client to follow through on agreed action steps.

**B. Practices visualization.**

From Olympic athletes in the 1980s to positive psychologists in the 2010s, visualization has been proven to help people tap into internal resources to accomplish desired outcomes.

# How

1. **Use the Making Decisions exercise to pinpoint an agreed-upon time when your client will choose to follow through on a well-designed action based on their values.**

2. **Guide your client to imagine that future point in time.**

3. **Ask your client, "What is it like to have made that choice?"**

4. **Explore the actual process of making that decision.**

   Ask questions like: "What's easy about the choice?", "What's hard about making that choice?", and "What's exciting about trying something different?"

5. **Go slowly through the vision, and help your client step into the reality of what making that decision will feel like.**

   "What does it feel like the moment before you strap on your running shoes?" "What do you notice the moment after you accomplish your action?"

6. **Ask what structures or additional systems your client needs to support their well-designed actions and values.**

# Jet Lag

When you approach the halfway mark and the conclusion of the coaching relationship with your clients, it may be a good time to look at the *Wheel of Life* again with these newer tools. *Jet Lag* is simply using the insights gained over past sessions to close the gap between your client's recent personal growth and any old habits and beliefs that no longer fit. *Jet Lag* uses *Values* as a tool to explore each aspect of your client's life with questions such as: "How would you apply this new value to this area of life also?" It's a powerful question that shortens the time it takes for an insight to percolate through all areas of your client's life.

The purpose of the *Jet Lag* tool is to help your client return to a state of self-alignment, where their perception of themself or the situation is back in sync. *Jet Lag* happens when a client has an insight or a deeper understanding of themself that moves them further along the path of personal growth quicker than if they would have received this insight at a later time or not at all. It's similar to what happens when you fly over a handful (or more) of time zones. The actual (local) time has accelerated, and it takes a few days for your biological clock to catch up. Recognizing such a phenomenon in a life coaching program helps cut down the time it takes your client to catch up with their insights.

## What

- **Original insight.**

  Identify a Learning, perspective, or value the client has experienced through the coaching process. This insight could have come through a specific tool, powerful questioning, the Coaching to Flourish model, etc.

- **Wheel of Life.**

  In addressing the other areas or topics in your client's life, they have the opportunity to create a visual representation of the impact an insight can have.

- **New insights and action steps.**

  The *Jet Lag* exercise leads to new insights for your client and serves as an opportunity for you to design new action steps in other areas based on the tool.

# Why

### A. Updates old values.

In a program designed for personal growth, newly-identified values will often clash with outdated values. For example, reading a book to learn something new clashes with the old value of escaping into television. The metaphor of Jet Lag helps clients see how the old value was useful at one point (for example, as a way to relieve stress temporarily), but is now less useful than the new value.

### B. Takes advantage of growth.

Like the metaphor of Jet Lag suggests, your client has grown in some area. Part of the journey of becoming an expert coach is being able to apply an insight from one area of a client's life to other areas. This exercise walks your client through that experience.

# How

1. **Briefly explain the metaphor of Jet Lag and how it's a natural part of the life coaching process.**

2. **Invite your client to complete another Wheel of Life.**

   This time, however, instead of looking at each area and assessing current levels of satisfaction, invite your client to apply their newly-created value or Signature Perspective to other areas in the Wheel. Ask the question, "What would be different about your approach to [name the area] if you applied [fill in the trademark value or Signature Perspective]?"

3. **Explore what would be different.**

   This exercise creates some great coaching homework! Be sure to follow up in future sessions, and return to this exercise as needed. Personal growth is a circular, not linear, process.

# Feedback Follow-Up

After compiling the client's responses from the 360 Degree Feedback survey, it is time to set up the follow-up session. The emotions that both the client and the coach may feel before, during, and after the follow-up session could range from excitement to anxiety to anger. It is extremely important that the coach sets a safe space and reminds the client of the intention and purpose of this 360 Degree Feedback process.

## What

- **Provide advance notice of feedback session.**

  Letting the client know when the follow-up session will take place is important, so there are no surprises. The advance notice also allows mental preparation time for both the client and the coach.

- **Compile anonymous responses.**

  Compile the questions and responses into one document. Make sure to delete any names or identifiers to honor anonymity. Make sure to review the responses beforehand.

- **Set the tone, review confidentiality, and create a safe space at the beginning of the session.**

  This follow-up session can get emotional. Often, it can be one of the most emotional or intense coaching sessions that clients and coaches have because receiving feedback can be tough for many people. That's why it's very important to take the time at the beginning of the session to remind the client that the purpose of this 360 Degree Feedback process is to learn and grow, that all elements of the session are confidential (within ICF ethics, but that does not need to be brought up if it had already been covered in the Designed Alliance and at the very beginning of the coaching relationship), and that it's a safe space, free of judgment.

- **Co-design with the client how to share the feedback.**

  If meeting online, some clients prefer that the coach emails the feedback to them at the beginning of the session so they can read it to themselves for a few minutes while the coach waits. Some clients may want the coach to read the feedback. If meeting in person, the coach could hand the feedback to them and wait patiently until they're done reading through everything. Some clients and coaches may want to email the feedback ahead of time. It is recommended not to do this as processing the information in real-time with the coach is the most safe and helpful. Also, the time between when the client reads the feedback and meets with the coach can be very difficult depending on the feedback.

- **Direct Communication & Sharing Observations.**

  This is a great opportunity for the coach to act as a mirror for how the client is receiving the feedback. Sometimes, the way a client receives feedback is reflected in the feedback itself. If this is true of your client, this gives you an opportunity to be bold and share this observation.

- **Coaching.**

  A rich multi-dimensional coaching environment has been created. In addition to the content of the responses and the client's feelings about them, you're also processing with your client how they are reacting to the feedback in the moment.

- **Empathy.**

  Find opportunities to ask powerful questions around building empathy with the evaluators. What may it feel like in their shoes? Why are they sharing this feedback?

- **Sit in awareness.**

  Some clients may want to rush into taking action to change their behavior immediately. While ideas for a developmental action plan may be explored, resist setting any accountability on action steps at this first follow-up. This can be an opportunity for your client to sit in their awareness and see what they notice before the next coaching session.

- **Next steps.**

  Suggest that the next session can be the “follow-up to the follow-up” where a developmental action plan can be created.

# Why

### A. Feeling safe and heard increases receptivity.

It is natural that clients may get defensive or feel upset, angry, shocked, or embarrassed by the feedback. When the coach reminds the client that it is a safe space and doesn’t judge the feedback, it allows the client to be more receptive and release judgment of the feedback.

### B. “Real-time” learning can be a powerful catalyst for change.

When the coach acts as a mirror and reflects back to the client that they are demonstrating behavior that is written in the feedback, it can be an "aha" moment. Often, the negative feedback is not a surprise to the client, but pointing out that they are engaging in the behavior in the moment can be enlightening.

### C. Listening with an open heart and mind is the best gift.

When clients remember that feedback is a gift, it allows for better listening and even a sense of gratitude.

# How

1. **Make sure the client knows at least a few days in advance that this will be the 360 Degree Feedback Survey follow-up session.**

2. **Make sure to familiarize yourself with the feedback in case any insights or observations come up during the follow-up session that may reflect what the feedback says.**

3. **Copy and paste the responses from the Google Form onto one document.**

   Make sure it's anonymous.

4. **At the beginning of the session, check in with the client to see what is present for them.**

5. **Remind the client that this process is for learning and growth, that it is a safe space, free of judgment.**

   Assure confidentiality.

6. **Co-design with the client the best way for them to receive the feedback.**

   Email to them now? The coach reads it out loud? If in person, the coach hands the feedback to the client?

7. **Be patient as the client reads the feedback.**

   Let the client know to inform the coach when they are done.

8. **Pay close attention to the client's reactions as they read or hear the feedback.**

9. **Wait until they are done.**

10. **Ask about energy shifts, giggles, sighs that they may have experienced while going over the feedback.**

11. **Ask the client what jumped out at them about the feedback. Some questions to consider are:**

    - What did they like about it?
    - What didn't they like?
    - What resonated? What didn't?
    - What caused resistance?
    - What surprised them?

12. **Share observations and offer insights if any behavior or attitude happening in the present session is reflected in the feedback.**

13. **The client may want to jump to action steps.**

    While action steps may be explored, inform the client that at the end of this session, there will be no concrete action steps except to sit in their new awareness and see what is noticed between now and the next session.

14. **Inform the client that developmental action steps will be created at the next session.**

15. **Acknowledge the client for their courage to take part in this process.**

# 19: Powerful Relationships

## *Chapter Overview*

*The quality of the relationships around us largely determine our effectiveness and happiness. This chapter explores the deep impact assumptions have in relationships, as well as two exercises designed to help clients arrive at insights to create peaceful, effective relationships.*

## *Essential Coach Qualities Covered*

*Empathy, Curiosity, Courage*

## *Skill-Check Questions*

*How does exploring the Powerful Relationship exercise empower clients, both in putting in effort to improve the relationship and in creating strong relationship boundaries?*
*How can I use the Empathy exercise to coach for insights?*

# Powerful Relationships

## What

*Powerful Relationships* is an exercise that uses life coaching principles to help clients understand the assumptions that they are making in their relationships. From this awareness, they can create well-designed actions to improve their relationships with other people. It is a chance for a coach to help the client proactively. Clients need to be reminded that they cannot control the thoughts, habits, and actions of others; they can only control their own. However, when clients learn to manage their own thoughts and assumptions about others, this can greatly influence a relationship.

The three elements of creating *Powerful Relationships* are:

- **The client's choice.**

  In life coaching, the client drives the agenda. If a client wants to focus on a specific relationship, this is an outstanding tool. Often, clients want to have a better relationship with someone, but at the same time, they also want to protect themselves from being hurt. The client has the choice to change their assumptions while still maintaining the bubble of protection. In short, this exercise only works if the client is willing to take personal responsibility for their role in the relationship and if the client *chooses* to put in the effort to improve it.

- **The assumptions that the client makes about people.**

  The exercise shows how simple—yet challenging—it can be to change assumptions about people. The exercise helps the client focus on their specific role in creating the relationship.

- **Empathy.**

  This exercise also accounts for the inherent nature of relationships and helps clients see that they are only one part of the equation. The exercise helps the client understand what it is like from the other person's point of view, focuses on building empathy, and uncovers resources to manage the relationship.

# Why

### A. Gives the client a powerful choice to improve a relationship (or not).

Helping the client focus on improving a relationship is a key to helping them look at specific areas in their life.

### B. Focuses on the client's role.

Just like a well-designed action, powerful relationships only focus on what the client can specifically control. This exercise points out that the client can only control their own assumptions and actions. Focusing on those two things is the best way for the client to improve a relationship.

### C. Asks clients to take a leap and think empathetically.

Essentially, the coach is asking the client to think from the point of view of the other person in the relationship. It is similar to Level 2 listening and helps clients understand how they are being viewed by the other person. That leap of empathy helps to improve the situation and is often the key for this exercise to be successful.

### D. Aligns assumptions.

People naturally want their assumptions to be proven true because they like to think that they can predict the future and therefore have control over it. This exercise helps clients align their assumptions with the other person's actions and what the other person might really want.

# How

### 1. Use the Powerful Relationships charts.

One chart is for a negative cycle; the other is for a positive cycle.

### 2. If you're seeing a relationship issue pop up a lot in coaching, invite your client to further explore what is not working in the relationship.

3. **Have your client write down some negative assumptions about the other person in the relationship (Box 1 in Powerful Relationships chart).**

4. **After your client has written down some negative assumptions about the other person, ask, "If you were to act from those assumptions, what actions would you take with that other person?" (Box 2 in chart).**

5. **Then ask, "Based on those actions, what assumptions may that other person have about you?" (Box 3 in chart).**

6. **Then, "Based on the assumptions the other person has about you, what actions may that person take?" (Box 4 in chart).**

7. **Point out that those actions that the other person takes will likely confirm the original negative assumptions that your client has about the other person.**

8. **Look for patterns in this assumption and relationship that also occur in other areas of your client's life.**

9. **After you've had a chance to explore this area, invite your client to choose a positive assumption and apply the same process of looking at the interdependence of each person's assumptions and actions.**

10. **You may need to remind your client that they do not have to necessarily believe in the positive assumption yet.**

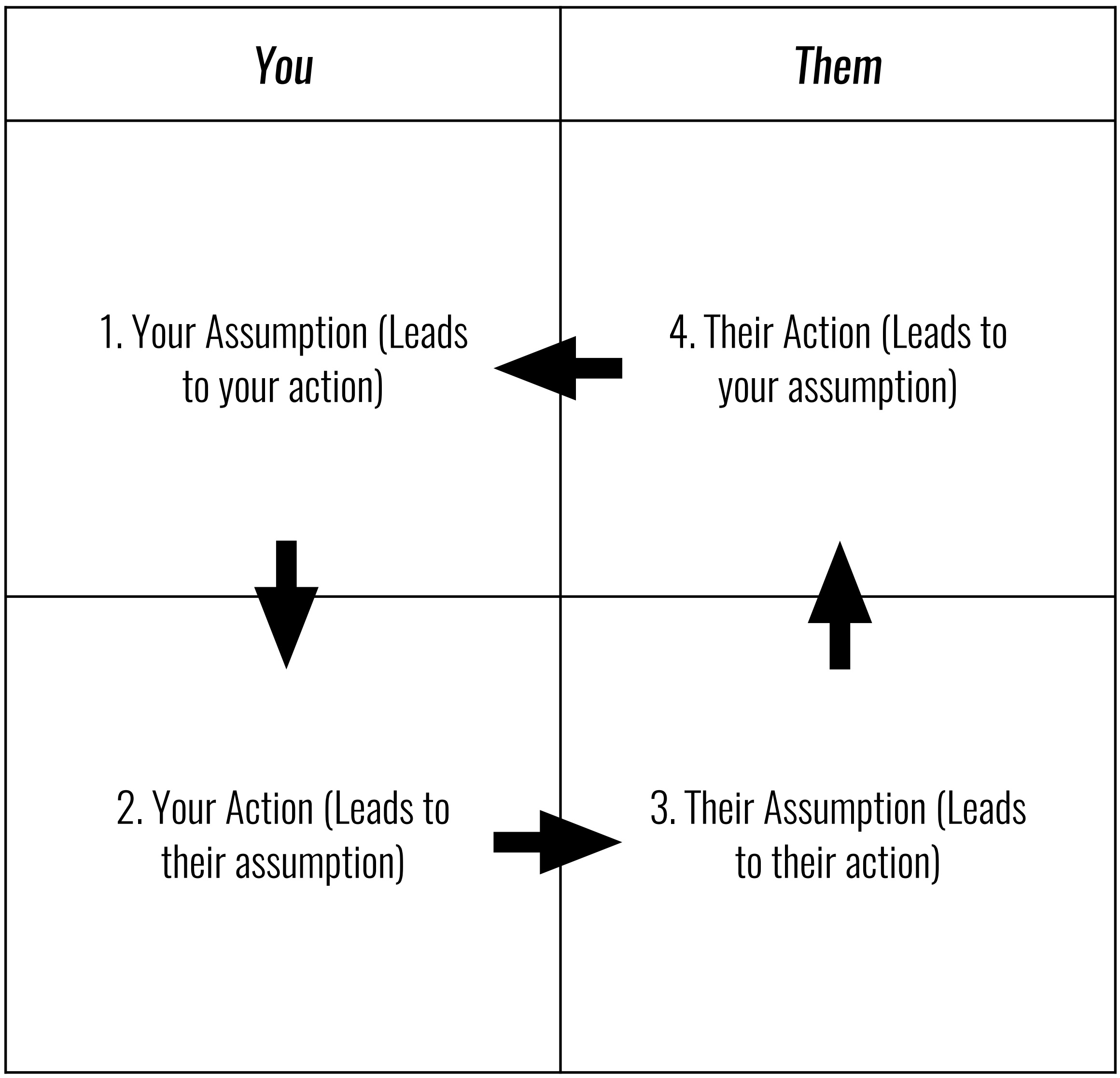
    It can be difficult for a client to create a positive assumption about another person when the relationship needs improvement. The point of the exercise is not to force your client to believe the positive assumption. The point is for the client to gain awareness of how changing the assumption may impact the relationship.

11. **In large part, each assumption relies on the other person also holding the same assumption and action.**

    If your client breaks the cycle and can successfully stay in that cycle while the momentum of the relationship goes in a different direction, your client has mastered the art of building a powerful relationship.

12. **Observe the cycle and put your coaching skills to use.**

    You've created a coaching-rich environment with a lot of different places to explore to bring growth and value to the session.




Leadership starts with knowing yourself and building relationships with others. *Powerful Relationships* builds on the personal growth and transformation that your client has undergone up to this point. The next stage is to apply the concepts they have learned to how your client relates to and communicates with others. This exercise applies the concept of the *Assumption Chart* to relationships.

This exercise works because it takes the emotional charge out of relationships that aren't functioning very well. Simply changing an assumption about someone doesn't magically make the relationship better, but it does set the stage for clients to get out of their own way and feel less of a negative emotional charge in order to build powerful relationships.

This exercise can put clients in a reflective mood, and the nature of the exercise gives them the responsibility for making their relationships strong. That responsibility is empowering, but it can also be daunting. Sometimes clients will even experience an energy dip as they process what they are learning. It's perfectly normal—and actually a good sign that you're facilitating some major internal work. It's a good idea to check in with the client a day or two after the exercise to see how things are going. This is big, important work, and this session is extremely powerful.

# Empathy

The previous exercise encourages clients to take responsibility for their assumptions in relationships. This exercise empowers them to take *leadership* in those relationships. Empathy is one of the core elements of emotional intelligence. Building empathy can sometimes be a challenge, but the first step is helping your client experience empathy directly by how you demonstrate it in your coaching relationship.

Much of what we do as coaches is based on empathy. I have spent whole sessions entirely empathetic, only realizing later - “Oh, yeah, I’m here too.” These sessions feel great. It’s as if a whole new world opens up, and you’re completely at the service of someone else.

Exploring this concept with a client aims to give a clear glimpse of that same awareness of empathy. As a life coach, you are allowing the roles to switch momentarily. You are asking your client to be empathetic *with you*. Because you’re sitting right there, your client’s guesses suddenly become real. Those guesses won't be judged for accuracy, and your job as a coach is to encourage your client to make those guesses and explore using imagination to enhance empathy.

By temporarily switching who is actively empathetic (you or your client), you’ve created an experience that leads to a coaching-rich environment. The next step is to resume your role as the coach, and to ask your client about the experience. Ask your client what opportunities are available to apply empathy. Empathy gives designed actions a powerful boost.

## What

- **Permission to do an unusual exercise.**

  Asking Permission is a useful tool that empowers clients to partner with you in the design of the coaching session. Asking Permission is a useful frame for unusual exercises or for ones that require your client to take risks and try out something new.

- **Role reversal.**

  This exercise requires the client to do Level 2 listening with you for a period of time. Such a switch gives your client the direct experience of empathy, which is useful for the rest of the coaching exercise.

- **Curiosity and action.**

  During the exercise, you use your skills, become curious, and create action steps informed by empathy.

# Why

**A. Creates direct experience.**

By asking your client to be empathic with you, your client has a direct experience of empathy. Such a fresh experience provides many opportunities for you to create learning and increased self-awareness for your client.

**B. Is applicable to other areas.**

Empathy is such a useful skill for people to change perspectives, communicate effectively, and powerfully step up into leadership. The skill used on the micro-level with just one person can also be applied to other areas of your client's life.

# How

1. **Introduce the concept of empathy.**

   (Here's the quick difference between compassion and empathy: Compassion is feeling sympathetic pity and concern for the sufferings or misfortunes of others. Empathy is the ability to understand and share the feelings of others.)

2. **Explain that the exercise involves switching roles for a few minutes.**

   You are asking your client to be empathetic with you, the coach. The purpose is for the client to get a feeling for what it is like to be empathetic with someone sitting directly across (or on the other side of the phone) from themself.

3. **Ask permission from your client to use the exercise.**

4. **Sometimes I introduce the concepts of levels of listening, then encourage my client to take a risk in venturing guesses about what my life is like.**

   What do I care about the most? What are my fears? My hopes? My dreams? My expectations?

5. **Allow your client to guess.**

   Give feedback if it feels natural, but be sure you are not judging their guesses.

6. **Diffuse judgment.**

   The important thing is that your client feels like they are flexing their empathy muscles.

7. **Switch roles back.**

   Return to being the empathetic coach who is focused on your client. Ask your client about what the empathetic experience was like. What worked well? What was hard about it? What was easy about it? What did it feel like when you had to guess at first? What surprised you about your imagination?

8. **Ask questions about how it felt using Level 1 listening (for the sake of self) vs. Level 2 (for the sake of other).**

9. **Apply the Learning.**

# 20: Leadership Legacy

### *Chapter Overview*

*This chapter dives into the topic of leadership and using the insights and growth clients have experienced during coaching sessions to design next steps.*

### *Essential Coach Qualities Covered*

*Empathetic, Empowering, Curious, Courageous, Confident, Inspiring*

### *Skill-Check Questions*

*How can I help my clients be proactive?*
*How does addressing leadership play out in a coaching relationship?*

# Leadership Legacy

In coaching, the brand of leadership to focus on is mission-specific. What kind of legacy do you want to leave behind when you leave your position? This world?

The foundation of leadership is not about convincing others to believe in what your client believes in. It's about deciding to step up and pursue something that your client wholeheartedly believes is worth pursuing. Coaching is based on the theory that establishing a vision and taking action steps develops talent. It's a growth-oriented mindset. Such an approach assumes that if there is desire and push, clients will develop the necessary skills, perspectives, or mindset shifts to gain the vital experiences they need to become great leaders.

The Leadership Legacy exercise is designed to get clients thinking about the impact they want to leave on this world. Put simply, this exercise encourages clients to think about how their vision and legacy will impact others in an intentional and thoughtful way. From a service-based leadership model, a leader is someone who serves others, creates experiences, and builds relationships. By stepping into the role of a leader, clients naturally develop the habit and skill of being proactive. Being a leader is a transformative act that has positive impacts in all other areas of life.

## What

This exercise is a coaching tool culmination, of sorts. It combines tools like vision, values, passion, and systems into a powerful action plan designed for leaving an impactful legacy.

- **Vision.**

  Early in the coaching process, the client should have developed a vision for their future. This vision will serve as the starting point for the legacy they want to leave.

- **Values and Passion.**

  Leaving a legacy requires acting from a value-perspective and delivering results from a place of passion and desire.

- **The Need.**

  The client should identify a way that their vision and values can positively impact members of their community. This can be as small as leaving a legacy for one person, or as large as developing a program that will address the needs of many.

- **Systems.**

  To leave any kind of meaningful legacy, your client will need to identify systems and action steps that will ensure the success of the legacy.

# Why

### A. Leaving a legacy contributes to a client's sense of meaning.

Meaning is one of the top five indicators of well-being and life satisfaction. It involves a desire to belong to something larger than ourselves and acts as a way to keep us anchored when challenges arise. A Leadership Legacy is one way to bolster this sense of meaning.

### B. Effort leads to outcomes.

By focusing on effort that the client can control, clients can focus on separating their abilities from the results. Whether the outcomes happen quickly or not, clients will benefit from focusing on the growth they can control and the mindsets they are able to build. When clients put in enough effort, outcomes will follow.

### C. Actions and learning go beyond the life coaching program.

After the coach-client relationship completes, their Leadership Legacy - and all of the learning and tangible steps it will require - will continue to engage clients in learning, and stretch their skills beyond the coaching relationship.

# How

1. **Explain the concept of developing a Leadership Legacy.**

   Ask your client if they've thought about the legacy they want to leave behind. Explain that the coaching process has helped them develop a growth mindset, and one powerful way to utilize this mindset is to share it with others. Let them know that a Leadership Legacy is a way for them to provide meaningful support to others after they're gone. Then, ask them if they'd like to explore their Leadership Legacy.

2. **Start with Vision.**

   If they agree to move forward with developing a Leadership Legacy, start by having them recall their vision. Coach around this vision, helping them create a vivid recreation of the vision for their future in their minds.

3. **Move to Values.**

   Encourage your client to think through the values associated with that vision. As you ask questions around values, passion, and vision, listen for ways the client sees these things helping others.

4. **Identify the need.**

   Encourage your client to think bigger and broader.

   - What is the larger vision and mission you're trying to accomplish?
   - What kind of change do you want to create in the world?

5. **Work through building systems.**

   Help your client identify the things they are doing right now that support their legacy. Then, have them identify the things they are doing that run counter to the legacy they want to create. With this knowledge, encourage them to think of systems they will need to have in place to develop their legacy.

6. **Create momentum.**

   If there's time, encourage your client to think about their daily activities. Ask questions like:

   - How does exercise play into developing your legacy?
   - How does creating time for play help you develop your legacy?

7. **Design clear pathways. (Well-designed actions are really important in this session.)**

   Be sure to identify one or two that are relatively easy to complete in a week. Mini-projects are useful here. Focus not so much on creating a grand project as on giving your client the experience of action-based service leadership.

As the coach, it's helpful to recognize that the concept of a Leadership Legacy is more about your client continuing to develop a growth mindset rather than accomplishing large tasks or achieving great success. Supporting your clients in thinking intentionally about their own growth and fostering leadership by helping them share it with others will serve them well in the end.

# Leadership with Core Motivation

## What

Throughout the coaching experience, clients explore personal growth and learning, yet the Core Motivation tool is especially powerful in isolating a client's Being or core characteristics. Core Motivation develops a deeper understanding of their personality and uses a framework to leverage strengths and overcome weaknesses.

At this point in the coaching process, you have developed a strong relationship with your client. You know your client's strengths and weaknesses, know what has worked and what has not, and have insights into possible directions your client can explore.

With this background, it makes sense to revisit Core Motivation through the lens of how your client can specifically build on the strengths of their personality. By looking at personality through the leadership lens, you can help your client take those next steps in personal development to push their performance to the next level.

- **Definition of leadership.**

  There are many different definitions of leadership. From a coaching point of view, leadership starts with the ability to lead yourself, do something that you believe in, and build effective and powerful relationships with others.

- **Core motivation tool.**

  Core Motivation consists of nine personality types. By this point in the coaching, you and your client are very clear on which one or two types best describe your client. If needed, you can refer back to the tool and the charts in the introductory session.

- **New direction.**

  With the increased clarity and deepened learning, you can help your client determine new directions of action. Using the frame of personality strengths and weaknesses applied to leadership, you are giving your client a fantastic foundation to explore action steps that will spark an upward spiral of increased leadership. This develops increased skill and ability to take on increasingly challenging projects.

# Why

### A. Focuses on Being from a leadership perspective.

The natural focus on a client pushing themself past previous performance boundaries for personal development is the reason why Core Motivation combined with leadership is so powerful. Such a strengths-focused discussion gives your clients increased resilience and taps into intrinsic motivation for the sake of self-realization. Developing ourselves is intensely enjoyable. It helps people take on increasingly more difficult challenges because we experience a sense of accomplishment and a greater capacity to do hard things.

### B. Revisits a recurring theme.

The coaching process starts with your client exploring their Core Motivation. This session revisits that exploration. By continuing the theme of addressing personality strengths and weaknesses, you increase the chances that your client will remember to use the tool even after coaching sessions are over. Coming back to the Core Motivation tool periodically through the coaching relationship mimics spaced practice sessions, which are proven to increase long-term working memory.

### C. Leverages personality as a tool.

The *Leadership Styles with Core Motivation* exercise prepares clients to take the next leadership step in service of a larger mission. It's designed to get your client thinking about personality as a tool that can help them pursue a passion and design a legacy. The purpose is to align your client's passion and natural talent with an eye to the future. How might they apply a passion and their talents to leadership practice in their community?

# How

1. **Explore the Leadership Styles with Core Motivation material.**

2. **Ask your client curious questions based on using personality strengths in service of pursuing a passion.**

3. **Ask your client about potential blind spots and weaknesses.**

4. **Design action steps to explore and hone a personality strength.**

| *Challenges to Effective Leadership* | *I Tap into my Natural Leadership Style…* |
|---|---|
| *Type 1: The Perfectionist* | |
| Mistakes, errors. Pressure of having so many things to get right. Not being able to stop thinking if what I am doing is good enough. Others blaming me. | When I allow myself to have fun and enjoy. When I accept myself and the situation as it is. |
| *Type 2: The Helper* | |
| Others not recognizing me. Having too much to do for others and not having time for myself. Caring too much about relationships. | When I don't depend on the recognition of others. When I focus on action that is beneficial for myself as well as others. |
| *Type 3: The Doer* | |
| Others thinking poorly of me. Inefficiency, things getting in the way of accomplishing a goal. Pressure from ambitious goals. | When I allow myself to focus on fulfillment. When I set aside the desire to look good for the sake of accomplishing a meaningful goal. |
| *Type 4: The Artist* | |

| | |
|---|---|
| When others do not acknowledge how I'm feeling, or even worse, when they tell me not to feel that way. Feeling inadequate, abandoned. | When I embrace the ordinary and work to make it exceptional. When I focus on principles without getting sidetracked by emotions. |
| *Type 5: The Expert* | |
| Demands on my time and energy. People invading my space. Being proven factually wrong. | When I take action and connect with people. Thoughtful and astute, I have the ability to think deeply about problems and create lasting solutions. |
| *Type 6: The Loyal Skeptic* | |
| Danger or threats. Not trusting other people. People breaking their promises or being unreliable. Problems. | When I focus on positive goals and view problems as challenges and opportunities. I can be magnetic when I act on positive assumptions. |
| *Type 7: The Enthusiast* | |
| Thinking that something better is out there for me. Feeling trapped in something boring or painful. Too many options and not enough time, or limits on getting what I want. | When I can use my natural ability to stir things up for a purpose. When I am willing to face negative situations and emotions and stay focused on creating positive outcomes. |
| *Type 8: The Defender* | |
| People who take advantage of me or others. Weakness in myself and others. Stupidity. Unfairness. When I sense injustice. | As Type 8, I usually have a big impact. As a natural leader, I truly shine when I take other people's needs and feelings into account. |
| *Type 9: The Peacemaker* | |
| Having people angry at me. Going along with the plans of others, even if I don't agree with them. Not being able to say no. Seeing possible problems but ignoring them. | When I have a clearly defined goal and I'm willing to step outside my comfort zone and take measured steps to accomplish goals. |

# Conclusion

### *Chapter Overview*

*Congratulations on completing your 1.0 coach training course!*
*This section addresses the art of completion for closing out a coaching relationship mindfully and powerfully. It also looks at the importance of celebration and looking toward the future as useful ways to complete a coaching relationship.*

### *Essential Coach Qualities Covered*

*Professional*

### *Skill-Check Questions*

*What are the elements that make a powerful conclusion to a coach-client relationship?*
*How is Celebration used as a tool for personal/professional growth?*

# Completion

*Completion* is being filled up or concluded. There is an art to completing a program well. Looking at Completion as a skill involves mindfulness in assessing the past and being aware of present emotions.

A successful Completion is part reflection, part acknowledgment, part gratitude, and part looking forward. Here is your chance to consciously reflect on the journey you took with your client and complete your professional relationship. Your client has successfully completed a specific portion of your work together.

The program takes clients on a journey of self-discovery, and it concludes by outlining future steps. While the *Completion* exercise is designed for clients who are concluding coaching sessions, most clients choose to continue coaching to some degree.

## What

Another word for this exercise is *Reflection*. Successful Completion has these five elements.

- **Mindfulness.**

  The key ingredient to a successful Completion is mindfulness—an awareness of the present moment. Mindfulness also plays a role in being self-aware of thoughts and emotions while reflecting on the past.

- **Assessment.**

  Ask your client to do a self-assessment using a *Wheel of Life* to identify how the coaching experience has had an impact on the different areas in their life. You should also ask your client to assess the program and your performance as a coach.

- **Acknowledgment.**

  Lean into the skill of Acknowledgment to empathetically recognize the character strengths you see in your client.

- **Design the Alliance.**

  You can do a quick Design the Alliance to design with your client how you want to build your relationship in the future. For example, you can make a plan to check in every three months or so to see how their Leadership Practice is going.

- **Gratitude.**

  Completions usually end in shared gratitude, with the coach and the client both thanking each other for a valuable experience.

# Why

### A. Serves as a mini-graduation ceremony.

*Completion* serves as a mini-graduation ceremony. It is time you set aside to reflect on past accomplishments and be mindful of the present moment. Setting aside such time helps the program feel complete and your client to feel a sense of accomplishment.

### B. Assessments help accountability.

An assessment provides a benchmark to judge whether or not the action was effective. The *Wheel of Life* is an easy way to help your client make a quick assessment to see how far they have come since the beginning of the program.

### C. Reflects on the professional relationship. Designs the future.

A mindful Completion gives both you and your client the opportunity to reflect on the professional coaching relationship: what was useful, what could be better, and what you and your client have learned from your time together. *Completion* is also powerful because you have the opportunity to discuss how you can best support your client going forward and what they want your future relationship to be like. (It’s great when former clients check in from time to time!)

# How

1. **Consciously take a moment to reflect back on the program.**

   Ask your client to do the same.

2. **Determine what you need to complete the program and the professional relationship.**

   You play an important role in your client's life. Your words matter. Acknowledgment is a powerful tool for moments such as these.

3. **Tap into gratitude.**

   Thank your client.

4. **Ask your client what they want to say.**

5. **Design the next steps with your client.**

   (Continue for another specified amount of time, or take a break?)

# Celebration

## What

From a life coaching perspective, *Celebration* is about creating a reminder of a past success for present motivation. A useful celebration reminds clients that the *effort,* not just the end result, is worth it. A well-designed celebration is fun and meaningful, but most importantly, it reminds your client of the value of work in the face of future challenges. When the tide turns and the challenges loom, having the memory of a celebration or a token sitting on a desk or a shelf acts as a reminder that all the effort and work are worth it. Celebrations should have the following elements:

- **Exploration.**

  *Celebration* starts with an exploration of the past or recognition of a successful action taken. It can also be forward-focused, looking at some point in the future once a project is completed.

- **Acknowledgment.**

  A celebration is a recognition of success. Useful celebrations include both an acknowledgment of the required work and effort, and the completion of the project. Sometimes, it can be difficult for clients to celebrate if there hasn't been a huge success. Reflecting and acknowledging how far they have come helps further their motivation.

- **Structure.**

  Sometimes celebrations can be an action, such as a party or going out to dinner. Celebrations can also be a tangible structure, like buying something special or memorable. *Celebration* could be both. A useful celebration includes some element or structure that serves as a reminder of the success.

# Why

### A. Reinforces motivation styles.

Celebrations are powerful and put clients into a motivation mindset. Having such reminders of past success and hard work helps clients feel more energized and more likely to take useful action and create systems.

### B. Recognizes small accomplishments.

It is helpful to celebrate small things and small accomplishments with small celebrations. *Celebration* becomes a constantly evolving structure for an empowering belief, a positive perspective, and the value of hard work.

# How

1. **Lead your client through another Wheel of Life exercise.**

2. **Refer back to the first Wheel that your client created.**

   Compare the two. You'll stumble onto some great coaching questions in the process.

3. **Identify your client's biggest accomplishments and the times when they put in the most effort.**

4. **Find a way for your client to celebrate those successes and to recognize hard work.**

   Build in a feeling of excitement and an acknowledgment of the work that was required. Allow the celebration to act as a structure for championing your client.

# Thank You!

Thank you for being an integral part of the Coach Training EDU community. Executive Coaching offers a new perspective on learning and performance.

The world of coaching needs your voice and your unique experience. We invite you to share your experience and to be involved in the community of those coaches who are passionate about making a positive difference. We are part of a movement to help people receive a different kind of experience and empowerment that has an exponentially positive impact on the world.

Thank you for being a part of this larger movement.

~John

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~John

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~Hayden