



# Making a Referral

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This resource has been created as a guide for coaches to know when and how to refer a client to different service professionals. In addition, it includes information about mandated reporting and how to respond to suicidal ideations. The International Coaching Federation has also published a white paper that details specifics on [referring a client to therapy](#), which coaches may also find helpful.

## Types of Referral

A coach is not a mentor, not a teacher nor a tutor, not a consultant, not a therapist. Each of these professionals serve a very important role and can be incredibly impactful on a person's life. As coaches, it's important to recognize the distinctions between these roles and when you should be referring clients for additional support.

**Coaching** is a partnership that enables your clients to trust their own instincts and solve their own problems. It's a partnership that trusts the client as the expert on themselves and their experience and focuses mostly on the present and future.

A **mentor** is someone who has wisdom or guidance to pass on to someone. Typically, this wisdom or guidance is in a particular area and comes from having more experience than the person to whom they are passing the knowledge.

**Teachers and tutors** similarly have expertise in a particular area and are looking to share that knowledge with others. As mentioned before, coaches see their clients as the expert, so in essence the client is teaching the coach what it is like to live their life. It is a simple role-reversal.

A **consultant** will typically observe, engage in conversation with key stakeholders, implement assessments, and provide a report of what is going well, what's not going well, and specific action steps to fill any gaps. Consultants will typically spell out what you need to do in terms of action.

**Therapists** often focus on resolving past issues whereas coaches focus more on the present and the future. Another distinction is that a therapist can be helpful when someone is currently in a state of low function or non-functioning. Whereas, a coach can help someone thrive and flourish.

## When To Refer

Knowing the functionality of each service professional is key to recognizing when to make a referral.

As coaches, since we hold advice for rare occasions, suggesting a **mentor** can be helpful for clients who are regularly seeking advice around a specific aspect of their life (e.g. career, family, or health).

**Teachers and tutors** are incredibly helpful for clients who need to learn specific information or details in order to effectively execute a project, task, or job.

A **consultant** can be helpful in a team setting and when your client is seeking a clear, step-by-step action plan.

A **therapist** can be valuable for clients who are struggling to identify lessons from past experience to move forward with or from. When clients are stuck in the past and unable to move forward, this is an indicator that referring them to a therapist could be useful. Now this is different than being stuck in the present looking for a way forward. In this case, coaching can be very useful.

## How To Refer

At any point in the coaching relationship, when you determine that a referral could be helpful to the client, there are three main steps to making the referral:

1. Use direct communication to share clearly what you're observing and follow it with a powerful question. This keeps the client firmly leading the direction and empowered in the decision-making process.. For example:
  - a. It seems you are looking for someone with experience in your specific field from whom you can seek advice. A mentor could be beneficial for this. What are your thoughts about working with a mentor?
  - b. It seems this past circumstance is really holding you back from moving forward. A therapist can be really helpful with resolving obstacles from our past. What's your relationship with therapy?
2. Make the referral by sharing contact information of someone specific with whom they can work. This doesn't mean that your client has to work with this person, but it sets them up for successfully taking action on the referral, especially when referring to a therapist. Consider when you've received a referral from a doctor. They provide a specific person whom they trust can provide what you need as their patient. This is very similar. For this reason, it is important to maintain a network of referrals.
3. Revisit your alliance to determine how this referral might impact your coaching relationship. Making a referral in and of itself does not mean that the coaching relationship has to come to an end. It simply means that you need to get on the same page about where to go from here. Here are some simple curious questions to consider:
  - a. Knowing that you are now working with a therapist/mentor/consultant/tutor, how does that impact the goals we're working towards?
  - b. What adjustments need to be made to the way we work together?
  - c. What do you want me to know about your work with your therapist/mentor/consultant/tutor?
4. Especially when making a referral for therapy, follow up on the action your client took in order to hold them accountable.

## Building a Referral Network

A core component of successfully making a referral is having a collection of people to whom you can refer and from whom you can receive referrals. Here are some tips on building this network:

- Start with your own network. Who do you already know who is a counselor, therapist, tutor, or consultant?
- Leverage Yelp, Google Reviews, LinkedIn or a similar platform to find highly rated counselors, therapists, tutors, and consultants.

- Connect with each person individually over a phone call, lunch, or coffee to discuss what each of you offers and how you can support one another. Ideally you are finding those who work with the same or similar target audience as you. In essence, you are designing an alliance with each referral source.
- Once you have an established relationship, be sure you have an easy way to make direct referrals. Instead of sharing their website, how can your clients get more direct access to this person in a quicker manner and vice versa for their clients.
- As you grow your referral network, you may find these organizations helpful as an in between option until you network is developed:
  - Counseling/Therapy
    - Better Help: <https://www.betterhelp.com/>
    - Talk Space: <https://www.talkspace.com/>
  - Tutoring
    - Tutor.com: <https://www.tutor.com/>
    - Tutor Me: <https://tutorme.com/>
    - Tutors International: <https://www.tutors-international.com/>

## A Note On Mandated Reporting

While life coaches do not currently fall under the purview of Mandated Reporter laws in the United States, these laws do serve as a guideline for reporting more serious concerns. In general terms, mandated reporters are those people who have regular contact with vulnerable populations (e.g. children, senior citizens, people with disabilities) and are legally required to make a report in instances of observed or suspected abuse (e.g. neglect, physical, psychological or emotional, and sexual abuse). This abuse could show up in one of three ways: abuse from someone else towards your client, abuse from your client towards someone else, or abuse from your client towards themselves. It is not the job of the reporter to complete an investigation or have certainty prior to making a report. Rather, a report must be made when abuse is observed or suspected.

Because coaches do not currently fall under the purview of Mandated Reporter laws in the United States, it is important for you to make an independent decision as to whether or not you will choose to uphold this standard and communicate this with your clients. This can be part of designing an alliance with your client and should be included in your coaching agreement. It is important to be clear with clients how implementation of mandated reporting impacts confidentiality (i.e. this is an example of when confidentiality would be broken).

Globally, Mandated Reporter laws are becoming more common, yet the United States, Canada, and Australia have the most extensive requirements. Because each state and country has passed individual Mandated Reporter laws, it is important to be aware of the laws in your state and country.

### Resources on Mandated Reporting

["Mandatory Reporters of Child Abuse and Neglect"](#) from the Child Welfare Information Gateway

["Mandatory Reporting of Child Abuse Around the World"](#) from AO Advocates

["Abuse in Disability Communities"](#) from National Domestic Violence Hotline

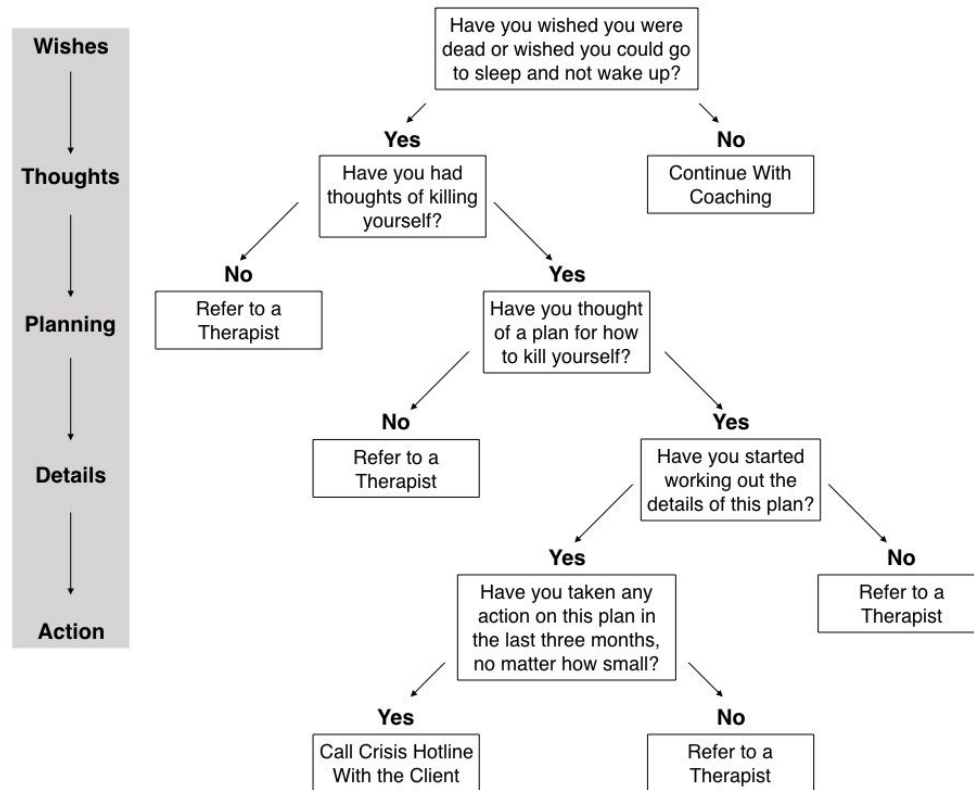
[National Adult Protective Services Association](#)

[2013 Nationwide Survey of Mandatory Reporting Requirements for Elderly and/or Vulnerable Persons](#) by the National Adult Protective Services Association

## A Note On Suicidal Ideations

When suicidal ideation comes up in a coaching session, it is important to address it head on. While life coaches are not trained as crisis responders, here are best practices for guiding your client to the help they need:

1. When a client shows signs that they are at risk for suicide, directly ask these questions:



2. Make a referral where necessary as described above.
3. Revisit the alliance and determine together whether continuing with a coaching relationship is appropriate or not. When making a referral as a result of suicidal ideation, you must reestablish the boundaries of the coaching relationship, unless you have received special training in this area.

Crisis hotlines vary by country and it is important to be knowledgeable of your local resources.

### Resources on Suicidal Ideations

[“We Can All Prevent Suicide”](#) from the National Suicide Prevention Lifeline

## Coach Support

A critical component of making a successful referral includes taking care of yourself throughout the process. As you build your referral network, it's equally as important to build your support network as well - those people whom you can call when a coaching session is tough or challenging, especially in the case that suicidal ideation comes up. We recommend that you find a coaching buddy who you can call for support through these types of situations.