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CO-ACTIVE COACH® TRAINING

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Co-active® Coaching Fundamentals

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CO-ACTIVE® COACHING FUNDAMENTALS OBJECTIVES

This course is foundational to the Co-active Coaching curriculum. It is also a course that stands on its own if you want to learn coaching skills, but don't necessarily want to become a professional coach. There are no prerequisites to take this course.

The purpose of this course is to provide training and practical experience in the techniques and skills of the coaching profession, specifically Co-active Coaching. This course is oriented toward participation and practical experience rather than lecture. You will have extensive opportunities to coach and to receive feedback on your coaching.

As a result of taking this course, you will learn to:

>> Use the four cornerstones of Co-active Coaching with your clients.

>> Communicate with your clients using the five contexts of Co-active Coaching.

>> Use the Wheel of Life with clients.

>> Distinguish and use the three levels of listening.

>> Demonstrate the most often used coaching skills.

Section 1 Introduction

WHO ARE WE?

At The Coaches Training Institute (CTI) we envision a world where people of all cultures, ages, and vocations are working with a coach, becoming more skilled at choosing and creating what they truly want, and living wildly rich and satisfying lives as a result.

Headquartered in the San Francisco Bay area, CTI was one of the first educational institutes to develop and offer coaching training and is a long-standing, recognized leader in the creation and advancement of coaching standards and integrity.

Participants in our courses are players in many arenas. Whether entrepreneurs, CEOs, therapists, parents, community leaders, or professional coaches, all are committed to having those around them performing at their best. What's more, coaching isn't only about serving others. Learning to coach is an opportunity to let go of your own personal limitations and stand in a place of spaciousness and creativity.

The Founders

What causes a good idea to blossom into reality? CTI attributes its success largely to the happy chemistry between its three founders, Laura Whitworth and Karen and Henry Kimsey-House. It is through the balance of their individual insight into human behavior, ability for creative collaboration, fervent passion for invention, and constant curiosity that CTI has grown from the seed of an idea into a flourishing, international force.

Along with co-author Phil Sandahl, they are responsible for the ground breaking book: *Co-Active Coaching: New Skills for Coaching People Toward Success in Work and Life*. Laura, Karen, and Henry continue to be the lifeblood, and source of growth and direction at CTI.

Your Course Leaders

One of the things participants in the Co-active® Coaching Fundamentals Course first notice is that instead of one course leader there are two. The next thing they often notice is that the presentation style of the two leaders is more like a dance than two separate presenters each providing a selected portion of the material. This style of leadership is very intentional. With two leaders, participants get to see two different coaching styles. This reinforces our belief that each coach brings a unique combination of gifts and talents — maybe even quirks and eccentricities to their coaching. In the Co-active model there are no "cookie-cutter" coaches. Our goal is to provide an adaptable model of coaching that each participant will make their own. The "dance" participants see is also a working example of the dance we believe is central to effective coaching: not only the dance between the two co-leaders (there's that notion of "co" and "active" again), but the dance between the two leaders and the participants in the course.

The course evaluations we receive over the years are also filled with praise for the quality of the coaching participants see in their course leaders. We take that for granted. All of our course leaders are Certified Professional Co-active Coaches (CPCCs) meaning they have completed all of the CTI coursework including the six-month intensive certification program. Many are Professional Certified Coaches (PCCs) through the International Coach Federation or Master Certified Coaches (MCCs).

The course leaders are more than trainers delivering content, they are experienced coaches who all maintain an on-going private coaching business (it's a requirement for CTI leaders) in order to keep their coaching skills sharp with continuous real-life experience week after week. It also means they have the first hand business experience of building and maintaining a coaching business.

The high bar we set for the coaching expertise of those in front of the room is also matched by the rigor we impose on them as leaders. In order to lead courses for CTI every course leader must complete a year-long, intensive leadership program. The Co-active® Leadership Program was created by CTI's founders, Laura Whitworth and Karen and Henry Kimsey-House. Most of the people who go through the Leadership Program do so entirely for their own personal growth as leaders, without the desire or expectation of leading courses for CTI. However it is a requirement for those who do lead courses.

As you can see, the people who are leading your course have made a significant commitment to coaching and to leadership. They have devoted a significant amount of time and effort in order to be qualified to lead and they passed a very demanding selection process in order to be chosen. They are working professionals in the coaching business and many are involved in other areas of coach training for CTI such as the Certification Program. They are also actively working to build the coaching profession as volunteers in a variety of programs to increase the visibility and professionalism of coaching. Feel free to ask them any question you like about the profession or business of coaching; just be prepared for a passionate response. These people believe in coaching.

Our course leaders represent a wide range of coaching styles, each grounded in the Co-active Coaching approach. As experienced CPCCs, CTI course leaders share an unparalleled commitment to Co-active Coaching and to the coaching profession.

OUR LEARNING PHILOSOPHY

CTI believes all people are distinct individuals, with unique needs and abilities. Our curriculum is designed to give the student three things:

1. A solid comprehension of core coaching skills,
2. An unconscious, almost instinctive competency with those skills, and;
3. A superior facility for effectively adapting those skills to his or her unique talents and style.

Educated in this environment, our students move on to wear their coaching hats confidently, bravely and with great personal flair.

For those students who do not wish to choose coaching as a profession, facility with the cornerstones, principles, contexts and skills of Co-active® Coaching can prove an invaluable catalyst for success in a wide array of professional applications. Since The Coaches Training Institute began offering courses in 1992, participants from all walks of life have pointed to their work with CTI as a key factor in their professional success.

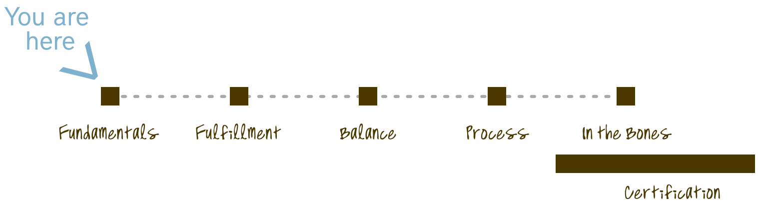
As a manager, you'll find that overall communication will improve both with colleagues and direct reports and you'll notice a dramatic increase in your ability to make powerful requests and hold clear accountability. As a sole proprietor, you'll see a shift in your conversations with customers and notice a marked improvement in your ability to understand and meet their needs. As an educator, you'll perceive a dramatic increase in your ability to design effective and dynamic alliances. Regardless of the context, training in Co-active Coaching offers an invaluable skill set for effective communication and success.

As with any muscle, developing an enduring skill in coaching requires time and practice. The Certification Program begins the road to mastery as a Co-active Coach. Comprehensive and rigorous, this program is designed for practicing coaches, to take their coaching to a higher professional level.

Upon successful completion of the Certification Program, including a written and oral exam, students receive the designation Certified Professional Co-active Coach (CPCC).

Intermediate Course Curriculum

Having been captured by the vision and impact of coaching, most graduates of the Co-active® Coaching Fundamentals Course want more. Our intermediate courses are intense and filled with hands-on learning that will immediately improve the quality of your coaching, whenever and whomever you coach. The following intermediate courses are three full days and must be taken in order.



Fulfillment
Coaching clients in the area of Fulfillment is about having them let go of preconceived rules and limitations, and step into creating lives that are centered in what truly brings them alive.

In the Fulfillment Course you learn to:

>> Use inner journeys and imagery to help clients define a vision of the future they will create.

>> Assist clients in identifying their unique values and assessing their satisfaction with living those values.

>> Identify self-defeating influences.

>> Begin creating the relationship with a new client.

>> Conduct an initial discovery session.

>> Discover and apply the secret of your unique enrollment style.

Balance
We live our lives in constant motion. It's easy to forget that we have a choice in what we do. Balance coaching is about guiding your clients to make powerful life choices, and to select the experiences they want most, rather than dashing about trying to have it all.

In this course, you will learn to:

>> Have your clients look at any situation from a number of perspectives.

>> Coach clients to make choices including choosing one perspective from the ones they've explored.

>> Have clients come up with an alive plan for action that arises out of the perspective they've chosen.

>> Bring clients to the place of commitment.

>> Use structures to keep clients in action.

Process
Process coaching is about being with clients wherever they are on the flowing river of their lives. Although uncomfortable, a client's mess, chaos, confusion and stuckness are part of his or her forward motion. Being with clients in both their messy and ecstatic places allows them to feel known, and in that mirror, to more fully know themselves.

In the course you will learn how to:

>> Use "Geography" in client interactions.

>> Facilitate a Life Purpose Statement with your clients.

>> Work with emotionally charged issues with clients.

>> Use process coaching skills that have clients experience in the moment what is true for them rather than talk about it.

In The Bones
A Co-active® Coach creates in the moment, uses intuition, and dances with the client. Co-active Coaching is not about applying techniques from some external static "rule book." In The Bones focuses on integrating what you have learned in previous courses and takes your coaching to a higher level of impact and professionalism.

At the end of the course you will be able to:

>> Demonstrate the ability to coach your client choosing among the principles of Fulfillment, Balance, and Process.

>> Create in the moment, rather than from any pre-conceived rules.

>> Incorporate your own creativity and ability with what you have learned in previous courses.

>> Articulate the Cornerstones, Principles, Contexts, and Skills of Co-active Coaching.

>> Understand the concept of "calling forth" and how to include it in your coaching.

Program Hours for the Intermediate Courses

Upon completion of the core curriculum you will have earned 116 hours of training as a Professional Co-active Coach. Many participants document this time as part of their professional development, and in some cases, are able to use some portion of these hours to meet continuing education or professional development requirements. CTI has been approved as an Accredited Coach Training Organization by the International Coach Federation (ICF).

This self-affirming, challenging program consists of a wide range of hands-on coaching, group instruction, one-on-one supervision of coaching appointments, required reading, and skill drills.

The Co-active Coach Certification Program is a six-month program and takes place entirely via telephone. A team of CTI-trained master coaches is available throughout the program to provide assistance, and support participants in the process.

The Co-active Coach Certification Program is accredited by the ICF, and is licensed by the California Bureau for Private Postsecondary and Vocational Education. It is also licensed by the states of California and Minnesota and as well as the California Board of Behavioral Sciences.

Program Requirements

CTI will award the designation CPCC when a program candidate completes the requirements as outlined in their program application. Here is a brief outline:

>> *Core Curriculum* — Students must complete Co-active Coaching Fundamentals, Fulfillment, Balance and Process Courses before beginning the Co-active Coach Certification Program. In The Bones must be completed before taking the exam.

>> *Clients* — Students will have at least five paying clients by the third week of the program.

>> *100 Hours of Coaching* — It takes time to integrate coaching skills and the CTI model for coaching. We have found that it takes about 100 hours of experience to become a "Professional Coach." Participants are responsible for tracking hours, along with other program requirements, and submitting these records to CTI at least two weeks prior to the exam.

>> *Group Calls* — Group telephone calls provide a structure for support and learning. Each phone call has a specific focus. These calls are weekly and are 1½ hours long.

>> *Triad Skill Drill Calls* — These calls focus on practicing specific skills. Each call is 1½ hours in length.

>> *Supervision* — Through direct feedback from a supervisor on actual client calls, you will gain insight and training on how to improve your coaching skills. Each call is one hour in length. Clients must give you permission to tape their sessions.

>> *Special Topic Calls* — Participants choose at least two out of six special topic calls to listen in on. These sessions are lead by CTI leaders, and cover hot topics in coaching.

>> *CD Recordings* — Before your weekly calls you are required to listen to a CD recording that relates to the topic of the week.

>> *Experience as a Client* — Working with an approved coach provides participants with the on-going experience of the work and benefit of being coached. Participants are required to work with a certified CPCC, PCC, or MCC for the duration of the Co-active Coach Certification Program.

>> *The Exam* — Upon completion of the requirements, participants are eligible to take the Certification Exam. The Exam consists of two basic components: a written test and an oral test.

WELCOME TO THE CTI COMMUNITY

As a CTI alumni, you are globally connected to the growth and development of coaching throughout the world. Entering into coursework with us makes you part of a large community of coaches and business professionals with like-minded commitment to developing human potential using the powerful tools of Co-active® Coaching.

As part of CTI's commitment to expanding coaching to all corners of the world, we have created the Co-active Network, an online community gathering place for coaches, and people who are interested in coaching. It is a free service provided by The Coaches Training Institute. The founders of CTI and authors of the book *Co-Active Coaching* often lead discussions there. Members of the Co-active Network come together to create learning, share resources, cultivate alliances, develop opportunities, and build community for the sake of forwarding and enhancing the lifelong process of human learning, effectiveness, and fulfillment. It is a great way to be connected to the latest in what is happening in the field, so register online at www.coactivenetwork.com and get yourself plugged in!

No matter how effective or successful you become as a coach, you will want to keep your learning edge sharp. CTI offers an ever-growing number of continuing education courses to assist professional coaches in playing at the top of their game. The main criteria for becoming a Co-active Coach are simple:

> “One must be fascinated by human potential, inspired by individual creativity, and unwaveringly committed to holding others as grand and capable.

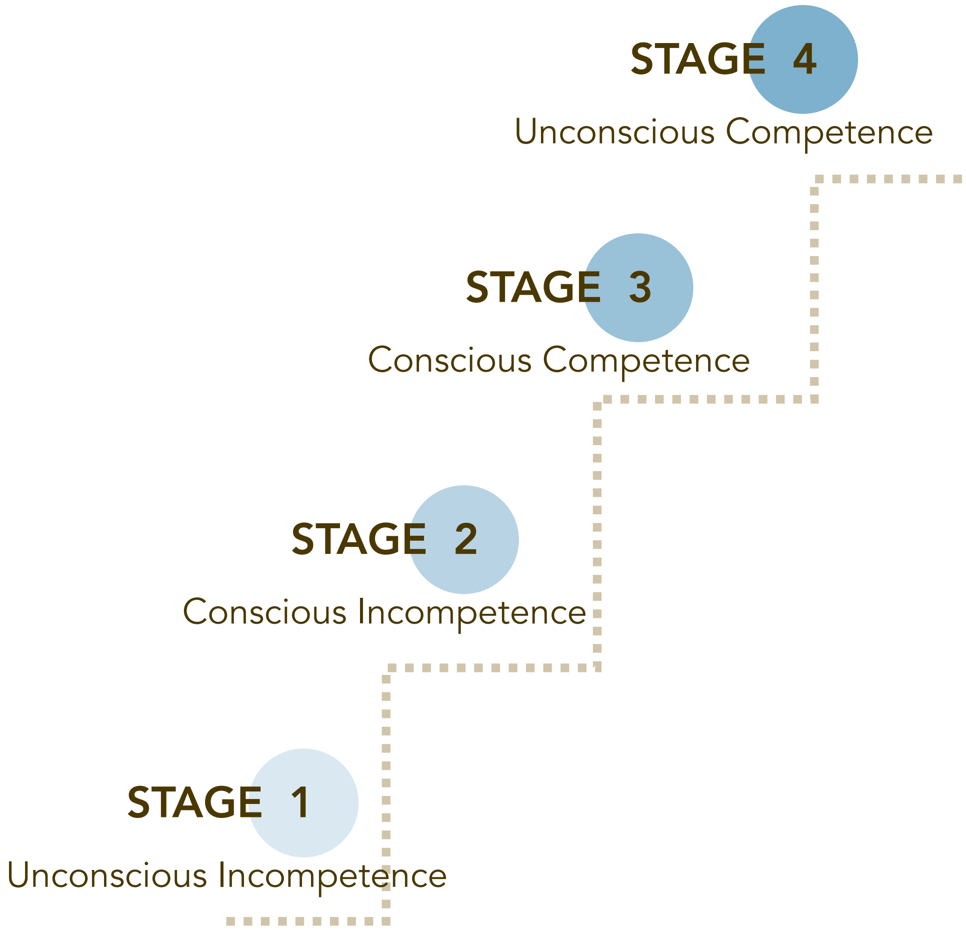
Section 2 Basics

LEARNING STEPS

Learning is a process that moves from incompetence to competence. Oh, if it were only that simple and that linear. It's not as our own personal experience shows us. Think of something in your own life that you learned how to do: you learned to play a sport, or play a musical instrument; you learned a hobby like knitting, fly tying, or sailing; you learned to ride a bike or drive a car. Once you achieve mastery you rarely think about the activity anymore and before you knew it was something you wanted to do, it was completely unknown to you — virtually nonexistent because it had no place in your world. In between those two ends is the action and drama of learning, the attention, the euphoria and the frustration. Learning can be described as a process in four stages.

Stage One: Unconscious Incompetence

I don't know what I don't know. We're incompetent but we don't care — we don't even know we're incompetent because the activity means nothing to us. The skills or techniques for achievement don't even matter; the thing itself doesn't show up on my radar. Think of two things where you are currently at this stage: unconscious incompetence. (Piloting the space shuttle for example.)



Stage Two: Conscious Incompetence

Now I know what I don't know. When we first start learning a new skill or way of being in the world, it can be overwhelming to realize how much we don't know. It can even be scary. Some people stop learning at this stage and give up. We're all fingers and toes. It is an awkward stage because we are focused so intently on every detail of every action or component of the thing we are learning. If you learned how to drive a vehicle with a manual transmission, recall those early attempts to concentrate on clutch in, foot off the throttle, change gear, release clutch, step on gas…all the while watching traffic, speed and thinking about the process as it happened. That's what conscious incompetence feels like.

Stage Three: Conscious Competence

I know what I know. What a relief. At some point we begin to realize we have achieved a certain level of mastery — at least over some aspects of the challenge at hand. We may not be experts but we have some expertise. We are aware of knowing a bunch of stuff. It's quite satisfying — right up until the moment we run into the next thing we don't know how to do. Then bang, we're tripping over our own feet, back into conscious incompetence: another area to master. As we become more and more adept in a given area, we cycle frequently between stages two and three, between conscious incompetence and conscious competence. Most of our learning time is spent bouncing around in these two boxes. It can feel bruising sometimes as well as exhilarating as we become more skilled and sometimes even forget what we know — which leads to the fourth stage.

Stage Four: Unconscious Competence

I'm not aware, and I know. This is sometimes called the "flow state." We are so in tune with the knowing we are on a different plane of being with it. Which sounds mysterious or transcendental — which it is in a way. We've all experienced it, even on a relatively elementary level. After driving a car for a few years, most days all we do is put the key in the ignition, set a destination in our brains and then drop the whole driving notion until we pull into the parking space and turn off the key. Have you ever changed jobs or moved to a new location in the same city and suddenly found yourself on the highway going to the old job or somehow driving an old route out of habit? Lost in space — or another way to say it is, unconscious competence. It's an example of the downside of this kind of mastery or flow state. Sometimes it's no help to be unconscious. Most of the time, this level of mastery makes the activity fun, even magical.

In the middle two stages when learning can be its most uncomfortable and most unsettling, look for what you do to regain comfort or control. Staying in the learning when it is a struggle is sometimes a challenge. Most of us would much rather know how, or look good, or somehow be well beyond the novice stage which can be so awkward, even embarrassing. When you know you are in the midst of learning and you are able to accept the process for the sake of moving forward, that's when learning happens. All of the strategies for comfort and control end up delaying or sabotaging the learning. It's something to notice anywhere it might show up in your life — after all, we're always learning. It's an especially important process to understand as you learn the skills of coaching (be easy on yourself in those middle stages, and easier on those around you) and it's an important process to understand for your client's sake because they will often be in those middle stages of learning. By understanding the four stages of learning you can have more empathy and be more encouraging to your clients knowing they will eventually find a new level of mastery in whatever it is they have undertaken. Trust the process. It works.

FOUR CORNERSTONES OF CO-ACTIVE® COACHING

1. The client is naturally creative, resourceful, and whole.

>> Nothing is broken or needs fixing.

>> The coach has the questions, the client has the answers.

2. Co-active Coaching addresses the client's whole life.

>> Focuses on Fulfillment, Balance, and Process.

3. The agenda comes from the client.

>> The client is in charge, the relationship is focused on the client getting the results they want.

>> The coach ensures the clients are always steering towards fulfillment and balance, and are able to engage in the process of their lives.

*4. The coach dances in the moment with the client.

>> We coach what shows up rather than from a rigid plan.

>> There is a fluid give and take in the lead between the client and coach.

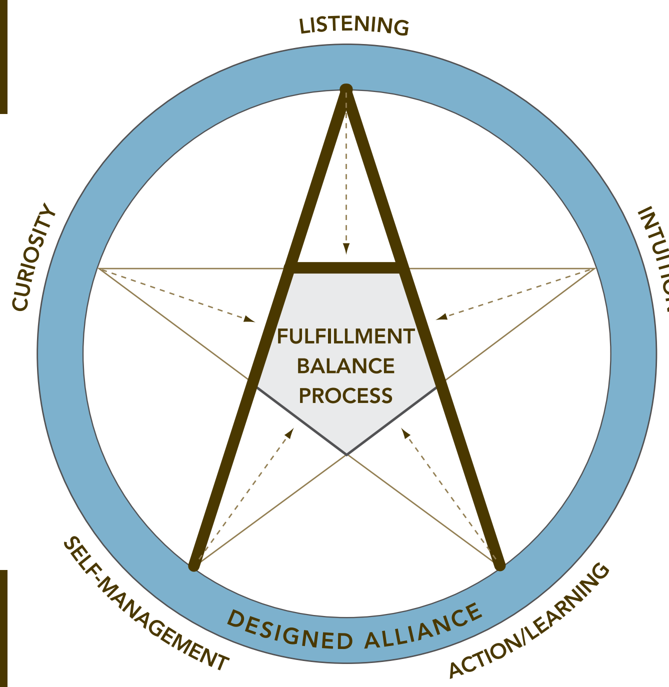
>> Everything that is happening is an opportunity for learning and movement.

* This cornerstone replaced "the relationship is a designed alliance," which appears in the book *Co-Active Coaching (First Edition)* by Laura Whitworth, Phil Sandahl, and Henry Kimsey-House.

THE CO-ACTIVE® COACHING MODEL

The employee, team or organization is naturally creative, resourceful and whole.

Coaching addresses the whole person, team or organization.



The agenda comes from the employee, team and/or organization.

The coach dances in the moment.

PRINCIPLES, CONTEXTS, AND SKILLS

Principles

In the Co-active® Coaching model there are three fundamental principles — three essential attributes of a client's whole life: the client's Fulfillment, Balance and Process. These three principles are organic and dynamic. Clients are moving toward more fulfillment, more balance and more effective process in their lives, or they are moving away. The ultimate intention of all Co-active Coaching is to help clients maximize their life in these three principle areas. One of the things that makes Co-active Coaching unique is that it is principle-based, not just content or issue-based. Not only do
Co-active Coaches work with clients to forward the action and deepen the learning on specific issues, the issues that clients bring to their coach are also seen as pathways to more fulfillment, balance and process.

Contexts

In the Co-active Coaching model there are five contexts: listening, self-management, intuition, curiosity, and Forward the Action/Deepen the Learning. Think of each one as a light that comes from the coach and shines on the client. Each one illuminates the coaching relationship in a different way. For example, the context of listening brings one dimension to the coaching, the context of speaking your intuition out loud adds another dimension to the coaching, and so on. By fully bringing all five contexts to the coaching, the coach is able to be fully present, brightly illuminating the client in the coaching interaction.

Skills

Co-active Coaching skills include specific techniques and skills such as the skill of acknowledgement, bottom-lining, or requesting. These skills have identifiable attributes and the skills are developed through training and experience. Co-active Coaching skills also include talents or abilities that a coach develops. For example, we all have the ability to listen; listening at Levels 2 and 3 is definitely a skill that can be developed. Skills are visible. Others can see and give feedback on where skills were present or absent, and the level of expertise a person displayed in using that skill.

The Client's Agenda

The client is the "star" in our Co-active model of coaching, and in the heart of the client's life live the three core principles of Fulfillment, Balance and Process. These three principles represent the underlying agenda for the client's life and they are the ultimate focus of all the coaching. There will be specific issues to work on: career change, time management, exercise, dealing with loss — they are the specific agenda items clients bring to their coaching — and they lead to Fulfillment, Balance and Process.

Fulfillment

What is fulfilling for clients will be intensely personal. We look at fulfillment as living a valued life, today. It is always available, every day, by living according to what the client values most. It is an internal orientation. So fulfillment is no longer something that will be achieved in the elusive future, it is possible today. Achieving goals can be very satisfying, but most clients find that living a life on purpose, on the path toward the goal is fulfilling as well.

Balance

Because life is always in motion, balance is a dynamic concept. Clients are moving toward better balance or away. It is never static. It is not a place to be reached. Coaching for balance begins by inviting clients to look at their lives from a variety of perspectives in order to be free to choose their own version of a balanced life. Balance coaching is about helping clients make life-giving choices. It is also about creating a plan of action based on their choices, committing to the plan, and moving into action. The coaching relationship provides a powerful structure of accountability for clients to be in action.

Process

We are always in the process of our lives. Sometimes it looks graceful, elegant, flowing. Sometimes it looks stuck in the mud. Sometimes it looks gleeful and energized. Sometimes it looks like struggle and pain. Where we are in the process is where we are — whether we want to be there or not. The coach's job with process coaching is to be with clients wherever they are in the river of their life: whether it's the fast-moving axis of the current, or the swampy backwater. The coach's job is to help clients go through the process so they can get to the other side. When clients avoid or deny where they are — it simply prolongs the stalemate. It's like trying to hold back the river. It brings to mind the old adage, "the things we resist, persist." Instead of fighting it…or wishing it would be different…go with it and flow with it.

The Five Contexts

In the Co-active® Coaching model, the client is the star, and at the center of the star are the client's Fulfillment, Balance and Process. Focused in on the client and his or her fulfillment, balance and process are the five contexts of Co-active Coaching: listening, intuition, self-management, curiosity, and forward the action/deepen the learning. Unlike skills, these five contexts are not something that a coach does; rather, together they comprise the ground from which the coaching unfolds.

When coaching is happening, a Co-active Coach is steeped in all five of these contexts at all times. If even one of the five contexts is absent, Co-active Coaching is not taking place.

Listing

It seems so obvious that listening would be one of the primary coaching contexts. In fact, we say that coaching happens in the context of a very particular kind of listening. In Co-active® Coaching we talk about three levels of listening.

Level 1: Internal Listening
When a person listens at Level 1, they are actually listening to the sound of their own inner voice. That's where their attention is. They may hear the words of the other person, but they are primarily aware of their own opinions, stories, judgments — their own feelings, needs, and itches. They may be nodding, and going, "uh huh," but inside they are saying things like:

>> *"I had an experience just like that."*

>> *"This is starting to bore me."*

>> *"I really need to get home to watch TV."*

>> *"I'm hungry; when was the last time I ate?"*

>> *"I'm terrified I'll say the wrong thing and look stupid."*

There are plenty of times in our lives when it is perfectly normal — it's actually important for us to pay close attention to our own needs and opinions — essential that we listen at Level 1. For example, when the contractor is asking you how you want your kitchen remodeled; that's a situation that is 100% about what you want; your opinions, judgments, desires. And of course, it's essential that clients in the coaching relationship be at Level 1. The coaching attention is fully on them: their lives, what they want, where they are and where they're headed.

Level 2: Focused Listening
At Level 2 there is a hard focus, like a laser, from coach to client. All of the attention is directed in one way. Think of a mother with a sick baby; all of her attention is hard focused on the child. There might be great chaos all around her, but the mother stays focused on the child and the child's needs. Picture two young lovers sitting on a park bench; they're both at Level 2 with their attention completely focused on the other person; they can be oblivious to the world around them. They are two people completely at Level 2, listening intently to every word and "listening" for every nuance in the conversation. In order for coaching to be as effective as possible, coaches need to be able to coach at Level 2. And then they need to add the ability to listen at Level 3.

Level 3: Global Listening
This is the soft focus listening that takes in everything. At Level 3 you are aware of the energy between you and others. You are also aware of how that energy is changing; you detect sadness, lightness, shifts in attitude. You are aware of the environment and whatever is going on in the environment. There is a way you are conscious of underlying mood, or tone, or the impact of the conversation — where it is taking you and the person you are talking to. Stand up comedians have a highly developed sense of listening at Level 3. They know when their humor is landing and when it isn't. Performers in general have highly developed antennae tuned to the Level 3 in a room — a sense of how the performance is being received — how the energy is building or dissipating. This is also the level at which your intuition will be most available to you as well as metaphor and imagery. Coaches learn to listen with this soft focus, Level 3 in order to pick up as much information as possible about the underlying impact in the moment.

Coaching at Level 2 and Level 3
The most effective coaching takes place when the coach is at Level 2 and 3. There will be times when coaches will drop into their own Level 1 place. The coach will fall back into judgment and opinion about whatever is happening in the coaching, and in effect, disconnect from the client. The coach may be analyzing their own performance, as in, "that was a stupid question to ask," or "I wish I was recording this session; the coaching is brilliant." At Level 1, the coach may be pushing their own agenda — sometimes with the best intentions of "helping the client." As a coach, the key is to notice when you are listening at Level 1 and find your way back "over there" with the client. Sometimes all it takes is asking a provocative, curious question.

Curiosity

In Co-active® Coaching we start with the belief that clients are creative and resourceful, and they have the answers. That means that the coach's job is to be curious and ask questions. The questions coaches ask are provocative, open-ended, inviting. The questions invite clients to look in a certain direction but the invitation has no preconceived conclusion. These are not leading questions. And coaches are not at all attached to the answer they receive. If it is not a fruitful place to look, clients will know and say so, or the coach will see that it was a dead-end, and ask a different question. Curiosity is a playful state, full of wonder. As in, "I wonder what you want?" "I wonder what your life would be like if you could design it to be any way you like?" "I wonder what you are deeply committed to?" "I wonder what's holding you back?"

The spaciousness of curiosity is miles wide and open for exploration. Coach and client enter this space together to look around. Curious is somehow less dangerous. Curiosity tends to lower the risk and eliminate the stifling quality of potential judgment. It's no big deal to look in a curious way. We're just being curious. And yet, curiosity is enormously powerful because it is so open to be surprised and to find the unexpected truth. It is child-like: look what I found! And it is exciting to look in a curious way.

Intuition

In addition to the customary five senses that help inform us about our environment, there is a sixth sense, intuition, that is extremely valuable in coaching. We see, hear, taste, touch and smell — and we have a "gut reaction." All six senses provide information on which we make decisions. Intuition is also a talent each of us is given in different measure and a capacity we can all develop. For example, we all have at least a rudimentary vocabulary of sound distinctions. We can hear the difference between a clarinet, a trumpet, and a violin. Composers have learned to "hear" the sounds of many different instruments in their minds as they compose music — even different combinations of instruments — because they have a highly trained ear. Intuition is like that: a natural talent that can be developed.

The first step in using your intuition in coaching is to learn to listen at Level 2 and 3 with your client, with your intuitive receiver tuned in to their wavelength, listening at Level 3, with a soft focus ready to pick up the intuitive messages — signals or nudges.

The second step is to notice that you have received an intuitive signal. Many people feel the intuition in their bodies. Sometimes it is literally a "gut" reaction. Some people don't feel intuition in their bodies at all — they simply have a sense. It's good practice to look for yourself, to see where you typically feel the intuition landing.

Step 3 is the step that is too often left out; that's to actually speak from your intuition. Intuition is of no benefit to the client unless coaches actually speak what their intuition gives them. You need to put words to the signal, or nudge you received, and say those words out loud. Unfortunately, we often hold back our intuition. We hold back because intuition is looked upon skeptically by our culture — at least compared to the scientific and empirical methods of knowing. Because of that we don't get much practice using our intuition as we grow up — so our intuitive "ear" is not well trained.

Sometimes we hold back because we're not sure our intuition is "right." In Co-active® Coaching, we would say that the noticing, or the nudge, the gut feeling — is always worth paying attention to. It's never "wrong." However, the words we put to the intuition — our interpretation might be off target. The key is to speak from your intuition and not be attached to your interpretation. Clients learn that your intuition is an invitation to look to see what might be there for them.

Sometimes the expression of the coach's intuition will be in the form of words. As in, "my intuition tells me there is a new place to look for you. What would that be?" Sometimes the expression of the intuition will be in the form of a metaphor or image. As in, "I get an image of a door opening. What's on the other side of the door for you?"

It's possible that the words or image won't mean anything to the client, in which case, the coach could simply move on. Or the client might say, "it's not a new place — it's an old familiar place — I need to go back and look again." It's not about being "right" with your intuition; in coaching, the key is to have the antenna sensitively tuned to pick up signals, and then speak boldly from that intuitive place — and dance with whatever shows up for you and the client.

Self-Management

Co-active Coaching is built on the premise that clients have the answers and that the coach's job is to hold the client's agenda. In fact, in the coaching model, the coach is virtually invisible — and yet, completely *present*. In order to achieve both requires the context of self-management. It means managing your own "stuff" in lots of different ways.

For starters, it means believing — *really* believing — that your clients *do* have their own answers. There is a temptation to be the expert or the problem solver, especially when your client seems stuck or floundering. They may even *want* you to give them the solution — and thereby become dependent on you for their results rather than learn how resourceful they can be. So self-management starts with holding back your advice and opinions. It means leaving out your personal experience and your own story of the way you've dealt with similar issues. The self-management mandate is especially important in the beginning as you learn to trust and see that clients are ultimately creative and have great, often unexpected answers of their own that they are more likely to own than prescriptions from others. Eventually you will find that there are times when it is appropriate to share valuable experience or expertise and that the best way to do that in a Co-active Coaching relationship is to ask permission first, and to be clear that you are changing from your coaching hat to your consultant or mentor hat.

Self-management also means managing your own Saboteur. As you develop your skills as a coach you are likely to notice when your performance is sub par which will be a natural opening for your Saboteur to butt in with comments like, "That was a stupid question." Or "I'm totally lost here." Or "Whatever made me think I could do this." And so on.

Unfortunately while you are carrying on an internal conversation with your Saboteur, you are no longer in conversation with your client, so self-management is about noticing the Saboteur and then as quickly as possible, returning to the client. Remember to be gentle with yourself. Collapsing into Level 1 happens. It happens when the coaching appears to be going badly; it happens when the coaching is going brilliantly too and you stop to notice that — once again you disconnect from your client while you bask in your self-enjoyment.

There will also be times when simply interacting with clients will be a challenge — when circumstances in your own life threaten to consume all of your attention: you've just had a fight with your spouse, you find out you are being audited about taxes you owe, you learn that your aging parent's health has taken a sudden turn for the worse. Self-management means leaving your own stuff outside so you can be totally present to your clients in spite of what might be going on in your own life. If you can't do that — don't coach. Let your client or clients know you can't be present; it's essential that you tell the truth because it preserves the trust of the relationship. Some coaches go through a grounding ritual of some kind each day, or before coaching calls. It can be especially valuable during challenging times to find a way to ground yourself or to re-ground yourself after a particularly difficult coaching session.

Action and Learning

One of the qualities that distinguishes coaching from other, similar relationships, is the emphasis on the client's action. For clients, coaching is about moving forward in their lives. That's why we say that one of the core attributes of coaching is *Forwarding the Action*. It is often the quality that brings people to a coaching relationship in the first place: they are stuck, or in transition, or just can't seem to get to "it" month after month. Coaching is an ideal structure because it continues over time and provides accountability as a motivating force to keep clients moving forward in their lives and work.

Clients soon discover that there is a second aspect to the coaching relationship and it is the complement to action: they learn from the action they take. They also learn from the action they don't take by the way. In effect, this becomes the means for deeper learning which is the reason we call this paired aspect, *Deepening the Learning*. Clients learn from what they do or don't do and they are asked to be accountable for that in their coaching. In Co-active® Coaching, that simply means they are asked to *account* for it. Accountability is completely judgment-free. There is no blame, or nagging or badgering. They don't have to defend it, or explain it, or build a shrine to it — simply account for it. Whatever action they took becomes feedback: What worked? What didn't work? How would they do it differently? What's next? In Co-active Coaching there is action (or lack of action), accountability, and learning…and that leads to new action, accountability, and learning…which leads to a fulfilled life, better balance, and an effective life process. It's the nature of the on-going Co-active Coaching relationship.

Designed Alliance

As you can see from the Co-active® Coaching model, the client is at the center. Surrounding the client is what we call the Designed Alliance. The coaching takes place within this container. It is the container that supports the client while they do the work they need to do. It is an unusual container because it is not "off the shelf." Client and coach design the container so that it is customized to specifically meet the needs of this client. It is also a dynamic container, capable of changing over time so that it will continue to meet the client's needs — not become obsolete. Much of the design of the coaching alliance happens in the initial discovery session between coach and client. In this first session coach and client openly discuss the strategies that will make the relationship as effective as possible for this client; addressing the question, "How do you want to be coached?"

Creating Safe and Courageous Space

The space that is created for coaching needs to be safe. In this space, clients will be working on their very lives. It is likely to be a place where they face their Saboteurs and other snares; they may have to face dark corners. They will need to take risks in order to grow and make changes. As a coach, you can't promise that this space will be comfortable but you play an important role in making sure it is safe enough.

The space must also be filled with courage: the client's courage to step boldly into their lives — sometimes when they're not all that sure what it is they're stepping into — and the coach's courage on the client's behalf: believing that the client is capable, strong, and enough. The championing that the coach provides is like armor for meeting dragons.

There are a number of attributes that help ensure that the space of coaching is safe and courageous. One of these is confidentiality. Clients need to know that what is said in their coaching calls will be held confidential. It is essential to the trust that is necessary in order for clients to open up their lives to coaching. This fundamental ground rule of confidentiality needs to be present and promised very early in the relationship — certainly, during the discovery session. In this discovery session, some coaches stress both the confidentiality of the relationship and the rare circumstances under which they would be compelled to break that confidentiality: if the coach believed that to withhold information might lead to harm to the client or to others, for example.

Telling the truth is another of those fundamental ground rules of coaching; it is essential to building trust and building a relationship strong enough to do the necessary life changing work. Clients expect the coach to speak the truth and not hold back. Coaches model truth telling as the means for growth. On the contrary, faking it, stepping over issues, playing "nice" when it's time to tell the hard truth — none of those strategies will serve the client in the long term.

There is a spaciousness that develops out of the trust that is created under these conditions. It is a safe and courageous space for clients to do what they need to do and be who they need to be, and a place of spacious acceptance for who they are in their lives, today, wherever that is.

In an interesting way, it is the coach who sometimes expects more from the client than the client dares expect of themselves, because the coach sees the brilliance and possibility and holds on to that, while the client sometimes is trapped in their own history and judgment. And yet, the coach also accepts the client exactly where they are, even when they are failing or playing small. It is a bit of paradox and it is the spaciousness of coaching.

The Initial Appointment (Discovery Session)

The initial appointment provides the background necessary to launch the coaching relationship. There is no set format for this initial appointment. Every coach will follow a different program, include different elements, and it is likely that whatever system you develop for your discovery session, you will customize that to meet the needs of each individual client.

The purpose of the discovery session is to create relationship with the client. An essential aspect of creating relationship is the design of the alliance between coach and client. Creating relationship also involves discovering the necessary background and other personal information that will be useful in the coaching. For example: What are the main areas of focus this client wants to bring to coaching? What goals have they set? What are the values they want to honor in their life? What motivates them to action? How have they created change in the past? What works?

The discovery session also gives the client an orientation to this unique relationship called coaching and an introduction to some of the specific coaching tools and language they will encounter. Most coaches talk about the Saboteur or Inner Critic, to alert the client to this character and its often sabotaging presence. Finally, the discovery session also covers the necessary logistics such as fees, cancellation policy, scheduling, forms, agreements, etc.

Big "A" Agenda, little "a" agenda

The Big "A" Agenda
The Big "A" Agenda lives at the core of every human being and is exemplified by:

- The desire to live life in alignment with what truly matters to one's most authentic self.
- The desire to live a life of conscious choice.
- The desire to be fully present to the experience of one's life, moment by moment.

Like the North Star, the Big "A" Agenda guides each of us in the direction that is most resonant and alive. Free from circumstances, fear or Saboteur conversations, the Big "A" Agenda calls each of us forth to the evolution of our most magnificent self.

The resonance of connecting to the Big "A" is clearly felt by both coach and client. It is a felt sense that lives at the heart of the Co-active® Coaching relationship.

Big "A" Agenda in the Co-active Coaching Relationship
The Big "A" Agenda is not a list of items. Rather, it is the coach's stance or orientation towards the client and serves as a lens through which the coach views the coaching and the client. It is what the client deeply knows about herself or himself, yet does not always remember or see clearly. The coach is always aware of the client's Big "A" Agenda, keeping it front and center in the coaching relationship, and reminding the client when the client forgets.

Everything that a Co-active Coach is and does in a coaching relationship is consciously in service of the client's Big "A" Agenda. Thus it is the Co-active Coach's responsibility to have the client see and experience their own magnificence and to create a container that calls forth the client's very best.

The little "a" agenda
Many things arise in a client's daily life: details, celebrations and challenges, logistics, relationships, Saboteur voices, other circumstances. Often these topics form the initial reasons a client comes to coaching. Co-active® Coaching defines these circumstances and day-to-day concerns as the client's little "a" agenda.

The little "a" agenda is a reflection of the client in the current circumstances of the client's life. Reflecting what is important to the client at the moment, the little "a" agenda also functions as an access point for the client's Big "A" Agenda, becoming a forum through which the Big "A" Agenda becomes manifest or expressed.

Context for the Definition Above
While the Big "A" Agenda serves the client and belongs to the client, it is the coach who holds the Big "A" Agenda with and for the client in a coaching relationship.

This Big "A" Agenda orientation points the coaching away from Saboteur conversations and limiting self-talk, and provides access to the naturally creative, resourceful and whole client that inevitably lies beneath struggles and challenges.

The little "a" agenda can also illuminate the ways in which the client is living into their Big "A" Agenda in many ways, usually when there is something to celebrate, there is resonance, and when the client is connected to their authentic and naturally creative, resourceful and whole self separate from the circumstances of their life.

With the Big "A" Agenda as the backdrop of the coaching relationship, the client can see how their circumstances fit into the bigger picture of their life. Also, they can find a sense of how to move forward — beyond solving the issue or problem or addressing the little "a" agenda item at hand. As the lens of the Big "A" Agenda shines a light into the client's circumstances, these circumstances become an expression of the client's full resonance and offer an access point for the client to learn more about themselves and their journey.

Holding
The coach holds the Big "A" Agenda for the client, and also coaches the client from the perspective of the client's Big "A" Agenda. At the same time, the coach maintains conscious awareness of the client's little "a" agenda, and the relationship between the two.

Clients often come to a coaching relationship wanting to make a change or reach a goal. They also want to grow as people, evolving to a fuller expression of their true self.

By coaching the client through the lens of their Big "A" Agenda, the coach is committing to coaching the client in their evolution as a human being. This is the bigger context in which the client is living his/her life.

Beyond cultural differences, beyond each situation, no matter how big or important, there is a thread of the client becoming more of the fully magnificent human being they are meant to be. It is this thread that the coach holds in the Co-active Coaching relationship as they hold the client's Big "A" Agenda.

The impact of this is that the coach insures that the client does not forget their Big "A" Agenda, and reminds the client of who they really are. When the client does forget, the coach is there to remind the client that they have stumbled off their path. The client then can choose to return to their path, experiencing deeper learning about who they are and how they operate in the process.

As human beings, we so often interact with the limited parts of ourselves and others, and we make space as we can for our naturally creative, resourceful and whole selves. Often our clients will show up in this way, being run by their small or Saboteur-driven voices. By holding the Big "A" Agenda, the coach can point the client back to who they truly are. At the same time, the coach helps the client notice and include those Saboteur voices, so that rather than something to vanquish or avoid, these voices are simply present, and not in need of attention.

By holding the client's Big "A" Agenda, the coach is interacting with the client's magnificent self, and encouraging the client to do the same, while making room for the limited sense of self, the small self and the Saboteur voices that inevitably show up in each of us.

By doing this within a coaching relationship, client and coach can create a map for the client that helps clarify decisions that need to be made, actions that need to be taken, all in a larger context than the circumstance of the moment.

It is the coach's role to fiercely hold the client's Big A, even when the client is scared or unable or unwilling to hold it for himself or herself. The coach must keep seeing the client as the magnificent person they are, as the full expression of their true self, best self, divine self, yet also have space to compassionately include and embrace the parts of the client that are not the client's best self. This way, the client is consciously creating his or her life according to his or her own unique dreams, vision, purpose, heart, desire.

If the coach does not or cannot see the client as naturally creative, resourceful and whole in the fullest sense of these words, then they will be unable to hold the client's Big "A" Agenda and therefore unable to hold the fullness of the Co-active® Coaching relationship.

This holding must be present before the coach can invite a client fully into fulfillment, new perspectives, or more deeply into the experience of their lives. Holding is strongly linked to the coach's presence. The coach must be able to deeply see and fully appreciate the client in all of their brilliance and their mess. This creates the safe and courageous space for the client to risk growth and change.

When the coach is firmly holding the client's Big "A" Agenda, the coach will naturally let go of problem solving, because they see that their job is to be a champion for the client's continuing development toward their most magnificent self.

By coaching the client through the lens of his or her Big "A" Agenda, the coach insists that the client be present with the part of themselves that is growing, striving, learning, reaching for what's next. The irony is that there is no place to reach, no place where it is complete — this is a lifelong journey, a lifelong process of discovery, learning and love.

Section 3 Business Practices

APPLICATIONS OF CO-ACTIVE® COACHING

As the profession of coaching grows by leaps and bounds, the possible applications of coaching are growing dramatically as well.

Some of you have taken this Fundamentals of Co-active Coaching course to learn the nuts and bolts of coaching so that you can start your own coaching business. You're either an experienced entrepreneur or an entrepreneur in the making.

Others of you work inside of businesses that use internal coaches and you are honing your skills to coach your colleagues more powerfully and effectively. Or perhaps you work for a company that offers coaching, and you're wanting to update your skills to strengthen the work you're already doing.

Still others of you are managers and/or leaders in your respective businesses, learning the Fundamentals of Co-active Coaching to bring a Co-active Coach approach to your interactions with employees and management.

And some of you are learning Co-active Coaching to become a more effective human being in all aspects of life, whether coaching is part of your day-to-day life or not.

This section of the manual has something for you; no matter what you intend to create with your new Co-active Coaching knowledge and skill. What you'll find in the pages that follow include:

>> creating your coaching business

>> how-to's of working with clients

>> being an internal coach

>> professional ethics

>> differences and similarities between coaching and therapy

Read on and find the parts of this section that speak to you and how you will take Co-active Coaching into the world.

Create Your Business Vision

If you don't know what your destination is, any path looks good! A business vision helps you define what you want your life and your business to look like and feel like a year, or two, or five, down the road.

As coaches, we use skills like visioning and goal-setting with our clients — what do they want in their life? What would that look like or feel like? How is that different than where they are today? What are their goals? How will they know when they've achieved those goals?

Your business vision is the big picture view of your business — the whole panorama of your life, including your business. Turn your coaching skills to focus on your own life, your work in the world, your desires and dreams.

A key ingredient in any business vision is your passion and your purpose. What is it about coaching that really fires you up? What is the change you hope to bring into the world through your coaching?

Having a business vision will benefit you in multiple ways. It will help you determine your best next steps and where to focus your valuable time, money, and energy. Having a vision, along with the goals that support that vision, will create a "roadmap" from where you are today to where you want to get to in the future.

A business vision will also help you remain motivated and energized as you make progress towards your goals. Starting a business takes work and dedication and not all the tasks are fun or enjoyable. Having a clear business vision will help you stay excited about your business and willing to take action even when the actions involved may not be comfortable or easy for you.

Continue to Invest in Yourself as a Coach

Congratulations on starting your coach training! The Coaches Training Institute is the premier school for training coaching skills, so you are in the right place to learn how to be a powerful, impact-full coach. Continuing your CTI training, through the entire coaching skills course sequence, is the most important investment you can make in your business success.

It is also important to become a certified coach. Through CTI you can become a Certified Professional Co-active® Coach, and the CTI Certification course is designed to help you deepen your coaching skills and gain invaluable mentoring and experience. In addition, you may want to pursue certification through the International Coach Federation as an advanced way to show your professionalism, experience, and dedication to the coaching industry. ICF certification is typically available after you have been coaching full time for a year or more as it requires a significant level of paid coaching hours.

The key difference between novice and master coaching is the facility with which the coach uses various coaching skills and techniques. This flexibility and adaptability comes only through coaching experience. Because of this, along with pursuing professional coach training, it is important to practice your new skills as much as possible — Practice! Practice! Practice!

When you are in training, and starting your business, it's the perfect time to coach as many people as possible in as many different walks of life as possible. Through these different situations, you'll become more at ease applying the skills and techniques that you are learning. By focusing on the consistent application and practice of your skills, you'll also be improving the quality of your coaching. Another benefit will be that you will gain clarity about what type of people and situations are most aligned with your own coaching style and life experiences.

One option for increasing your opportunities to practice coaching is to offer pro-bono coaching to your favorite non-profit and community organizations. You'll be gaining invaluable experience while also giving back to the community in a way that is meaningful to you. In addition, the organization will benefit from your coaching, helping them to become more successful and fulfilled. It's a win-win situation!

Additional Resource
>> International Coach Federation (ICF): www.coachfederation.org

Who Are You as a Business Owner?

Look inside and ask yourself — Do you see coaching as a hobby or as a real business? Do you see yourself as the CEO of your business? Whether or not you like the term CEO, you are the person in charge of your business!

Your business vision should include not only your dreams for your business, but also a vision of yourself as a business owner. If you think of your coaching practice as just a hobby, or "something you do on the side" then that is what you will have! If you see it as a real business, then that is what you will have!

Examine what Saboteurs you might have about what you assume it means to be a business owner and what you assume you have to do or be in order to become a business owner. Do you assume it means that you have to be focused only on the bottom line, not interested in people, be serious all the time, wear pin-stripe suits, be conservative and stuffy and domineering? If that's what your Saboteur is telling you, examine how that benefits you. Chances are, it's holding you back from fully stepping into your power as the one person in charge of your business. You get to decide how you want to act and be as a business owner — not your Saboteur.

As a self-employed coach, you are wearing two hats: coach and small business owner. Both roles are equally important! As a business owner, you may realize that you need additional learning and skills in topics such as marketing, finances, business legal issues, and the like. There are many ways to gain these skills, through training organizations such as CTI, your local community college, and private workshops and seminars.

Many coaches find that it works better for them, and honors more of their values, to form alliances with other coaches or related professionals such as trainers, consultants, or therapists. They find that these alliances help keep them focused and provide companionship while they work. Experiment and see what works best for you.

Additional Resources

>> *Fast Company* magazine: www.fastcompany.com

>> National Association for the Self-Employed: www.nase.org

Take Stock of Your Primary Resources (aka Time, Money, and Energy)

It's important to set clear expectations for yourself. How much time are you willing to spend on your coach training and starting your business? How much money will you truly spend? Without knowing the answers to these questions, you might be over-expecting things of yourself — energy-wise and financially, too. Take an honest appraisal of your finances — how much money are you truly willing to spend on your coaching business for the next year? This amount needs to cover your coach training, travel, and any start-up expenses you might have. Any revenue you receive from clients will be additional funds, and it's important to know how much of your own personal money you will make available to spend. Also take a good look at your schedule and other commitments, such as full- or part-time employment, family commitments, and other activities. Be honest with yourself about how much time you will invest in your new business. It might help to create a schedule for an average week. When do you have chunks of time set aside to attend training, practice coaching, be coached, and develop your business? You may find that you only have 10-15 hours a week maximum to devote to your business. Don't panic! You can build your business with as little as five hours a week, it just means that your progress will be slower.

By knowing how much time and money you will spend on your business, you will be in a better position to develop your plans for your training and business development. Armed with the exciting plans that you are committed to making real, your chance of success increases tremendously!

Marketing Your Business

So by now you have your business vision, you're pursuing your coach training and getting lots of practice, you're feeling more empowered as a business owner, and you have a clear idea of how much time and money you will spend on your business. Bravo! You are establishing a strong foundation for the success of your business!

Many new coaches think that a marketing plan is the first thing to work on, but as you can see from this document, it's important to create your business foundation before you turn your attention to marketing.

The term "marketing" is a very broad term, and it can be defined many ways. There are hundreds (maybe thousands) of marketing books available and they each have their own definition of marketing and how to do it. It's important to know that there is no "right" or "wrong" marketing, but rather ways to be "more effective" or "less effective." Plus, what might be "more effective" for you may not work for someone else — marketing is not a "one-size-fits-all" topic. The most successful marketing plans are the ones that authentically fit who you uniquely are and how you uniquely be. So if you have a Saboteur that tells you that you need to be extroverted to be good at marketing, or have to do this or that type of networking, rest assured that the Saboteur is wrong! Effective marketing is what comes from you being authentically and powerfully yourself.

There are two main areas of marketing that are important in your first year: being enrolling and your marketing activities. We'll talk about each of these in turn.

Enrollment

Enrollment is an essential skill to use in building your business. As mentioned earlier, it is important to practice your coaching skills as much as possible. Whether you are coaching pro-bono or have paying clients, using your enrollment skills will make the process of finding clients much easier. The enrollment process has both "being" and "doing" aspects, and both are equally important.

The Being of Enrollment

Coaching is a personal business, and so your clients need to be enrolled in you — who you are, what you stand for, how you make connection and establish rapport, your outlook on life. It is also important for the potential client to be enrolled in the power of coaching. You must really believe in the power of coaching and in your skills as a coach, even when they are relatively new skills. If you don't have these fundamental beliefs, your potential clients will not connect with you as a coach.

Imagine that someone is talking to you about the value of a specific diet or exercise plan. You, as the listener, will pick up clues (tone of voice, body language, specific words) that will tell you if the person really believes in the regimen. If they are not genuinely sure of the true power of the diet or program, you will be unsure, too.

When you are a coach, if you are not clearly in the land of believing and enrolling, you will be in the land of convincing. Then the folks you talk to will also be in the land of convincing, and that is a very difficult place to enroll from.

You need to know that coaching works, and communicate that awareness as you enroll new clients. Don't think that "enrolling" means "getting clients." When you are enrolling, you should remain focused on having the potential client learn more about coaching, and learn more about you. If you are focused on "getting a client," your conversation will feel more like a sales pitch, in the land of convincing rather than the land of enrolling.

The most important aspect of enrolling is to be authentic. Allow yourself to be real and genuine, and to be however clumsy and awkward you are. Give yourself permission to fail. Focus more on the person you are talking with and less on what you say. Don't worry about being professional, or "cool and calm." If you are nervous — just say so! Be yourself, let your natural passion and enthusiasm for coaching shine through!

Another critical aspect of the "being" of enrollment is to give up any attachment to the results of your enrollment efforts. This does not mean become apathetic, rather it means to recognize that not everyone you talk to is going to want coaching, and not everyone you talk to will want you as a coach. If you are attached to specific results and allow your Saboteur to tell you that a "No" is a judgment of you as a person or you as a coach, then you won't be setting yourself up for success.

The Doing of Enrollment

The most important "doing" of enrollment is to be a coach, don't be a salesperson. This means having your attention over there, with the person you are talking with, rather than on yourself and whether you are doing it "right." If you find yourself wondering "am I doing this right?" you can bet that your focus is misplaced! Notice what is interesting and unique about that person. How can coaching make a difference in their life?

Enrollment can be fun! Play a game with it. Lighten up and let go of having it be significant or serious or "right/wrong." It can be fun to get into relationship with people, connect with them, learn about them and their lives, dreams, and goals. Talk with them about their favorite subject — themselves! — and how they can use coaching to get clear and go after what gives them joy and satisfaction in life.

Here is a fun game to play: The "No" Game. See how many no's you can collect in one day. Go for the "no." Make a game out of getting 5, or 10, or 20 no's a day. You'll get some no's, that's guaranteed! And along with the no's you'll get some yes's too! In the process you'll be talking with lots of people about coaching. This will create momentum and a sense of forward movement in building your coaching practice. Set up the "No" Game with a buddy and play it for a month or two. Whoever gets the most no's is the winner! By getting more no's (and along with that more yes's) you'll be improving your skills of talking about coaching, making connection, and being enrolling!

Keep the enrollment process fresh and exciting, challenging and fun. There will be good days and less-than-good days, just like any activity in life. It will be more effortless and enjoyable if you play full out, regardless of the outcome. A good rule of thumb is "100% participation with no attachment to results." Following are some specific actions involved in enrollment.

- >> *Asking:* A great way to enroll someone as a client is just to ask them! It's amazing how many new coaches will talk enthusiastically about coaching and connect with the listener but then not ask the person to be a client. You won't get the business if you don't ask for it!

  Make a list of people you know that you think would like being coached, that you'd like to coach, or who you want to tell that you are a coach (i.e. potential referral sources). Pick people with whom you are acquainted, but stay away from your best friend and close family members. Call the people you would like to coach and let them know about this exciting new business you are starting, and what value it could bring to their lives.

- >> *Claiming:* Claiming is a very special way to have someone become your client. You can claim them, just like you would stake a claim to something you really wanted. Let them know that you think they are terrific, that you are really excited about what they are doing with their lives, and that you want to work with them as their coach. Tell them that you won't take no for an answer, and that you are willing to do whatever it takes. You can't do this as a gimmick or technique — you'll come off looking like a stereotypical used car salesman. Claiming must be authentic and come straight from the heart.

- >> *The Steps for Enrollment:* These are the basic steps involved in enrollment. Sometimes these steps will occur really quickly — in a matter of a few minutes — other times it will take longer and require multiple conversations. Don't make up any stories about what it means if it takes a shorter or longer period of time. It only means that you are talking to a different human with a different perspective and life.

  1. Create connection and relationship. This can happen with a friendly greeting, a pleasant exchange, eye contact, and a warm handshake (or hug!). It doesn't mean that you need to find out the life story of an individual, just make a connection with them and let them know that you are available to them, interested in talking to them and learning more about them and their life.

  2. Learn about them. What goals or dreams does he or she have? What do they want to accomplish in their life? What brings them joy? What change do they want to make in their life? Ask them about their career, their business, and their life. Be a coach! Follow the passion and the emotion to learn more about them. Be curious and let them tell you more about themselves.

  3. Don't explain coaching, do it! Ask them if they'd be open to being coached a little. If they say yes, coach them on some issue or dream or challenge that they mention. Help them see a new perspective on an issue, or a new way of looking at a situation, or to define one step they can take now to move them closer to their goal or dream. Ask them powerful questions (even just one or two questions can have an impact!) and be over there with them.

4. Make an offer. Tell them that you are a coach and that you'd like to work with them. However, if you are talking with someone that you don't want to work with, then don't make this offer — it will sound insincere. If you do want to work with this potential client, tell them a bit about how you might work together, e.g., weekly coaching sessions similar to the coaching you both just participated in.

5. Ask for the business. Up until now, you've had a great conversation about their life and coaching. Now is the time to ask them to become your client. Ask them directly and confidently, in your own words. Be authentic and show enthusiasm! Remember that you may get a "yes" or a "no." If you hear a "no" you may want to find out more. The "no" might mean "no, not now, I'm focused on other things" or "no, I don't think I can afford it" or "no, coaching really doesn't interest me right now." Sometimes a "no" answer is really a question in disguise. If so, work with the person to determine the question and answer it.

6. Agree on next steps. A "yes" could be for a sample session or to become your client. Determine what the next steps entail and how you'll handle them. Set up an appointment right then or agree to communicate via email or phone to set one up. Make sure to get the person's name, email address, and phone number! If you agree to specific steps (like sending them an email or phone call), complete those actions in a timely manner.

Other Enrollment Tips

>> Practice! Practice! Practice! Just like with your coaching skills, your skills of enrollment will improve the more you practice. Basically, you get good at enrollment by doing it a lot. If you wait until you feel 100% comfortable with the words and the delivery, you'll be wasting valuable practice opportunities. In addition, the more polished and smooth your delivery, the more inauthentic it can sound. The best way to practice is to talk to lots of people, let them know about the power of coaching, and ask them to become your client. You can also increase your confidence by practicing with a mirror, a friend or family member, a coaching buddy, a tape recorder or just by yourself.

>> Keep your support network strong. Connect with other coaches that are in a similar phase of business building and create a support network. Buddy with these other coaches to provide mutual support, brainstorm ideas, share triumphs and challenges, and help you stay motivated.

Marketing Activities

As we've already discussed, enrollment — the direct interaction with potential clients and referral sources — is the most critical component of your marketing! Regardless of what other activities you do, keep in mind the guidelines and process of enrollment. In this section we'll talk about some additional marketing activities.

Contrary to popular belief, your marketing activities do not require fancy brochures or business cards or a website. All of these are useful materials when you have an idea of your niche, your services, and your value to the world. The following activities are appropriate when you are in your first one or two years of coaching (and after that too!)

Determining Your Niche
A niche is a specific group of people that you want as clients, or a specific focus to your coaching (which might imply a certain set of clients). Example niches include: men and women age 50 to 70 who are either newly retired or will be retired in the next five years, breast cancer-survivors, CEOs of *Fortune* 500 companies, female executives, first level managers, college-bound teenagers, or devout Catholics wanting to blend their faith and career. Niches can be demographic-related, meaning that you can describe specific characteristics of your potential clients such as age, sex, income level, religious denomination. Niches can also be content- or lifestyle-related, such as spirituality or people who are critically ill. The potential clients for these niches can come in all shapes and sizes, demographically speaking.

Having a primary niche helps focus your energy and time on a specific group of people. You are no longer trying to be the "coach to the world" but have selected a section of the world on which to focus. The key word here — and a challenge for new business owners — is the word focus. No matter how in-depth your training, nor how masterful your coaching, you will naturally be a more effective coach for some folks and a less effective coach for others. Finding a niche that suits you will help you focus on those folks for which you will have the greatest impact.

By focusing on a specific group or type of people, you can discover how to come in contact with them — where they spend their time, what activities they take part in, and what associations or organizations or groups they belong to.

You are already a part of many niches! They are at your fingertips right now. Look for a niche that you feel an affinity for, that you have experience with (perhaps even belong to right now), feel a connection to, and enjoy working with.

Networking
When you are just starting out, any visibility is good. You want as many chances to talk about coaching as possible! Find out what kind of networking events happen in your area and attend lots of them, not only to meet different people but also to determine which networking events might be the most beneficial for you. These networking events might be business related (Chamber of Commerce), or professional associations (of nurses or project managers or teachers), or community events (Friends of the Library or Toastmasters), or community service organizations (Rotary and Kiwanis and Lions) or Leads Groups (LeTip or Business Network International). Whatever the group, attend for a few times before you decide to join, to make sure that it is the best use of your time. You will have many more opportunities for networking near at hand than you can attend on a regular basis, so you need to choose carefully. Select which networking opportunities are best for your niche and your personal style.

When attending a networking event, it's not effective to just hand out business cards and shake hands. That's not a way to make connection! Better to go and connect well with only 3 people than go quickly through a crowd and hand out 30 business cards. Don't forget the steps of enrollment — connect, learn about them, coach, make an offer, ask for the business, agree on next steps. One of your goals in attending the networking event will likely be to become more comfortable talking about coaching, and your services. They are perfect opportunities to practice your enrollment skills. If you leave the event with just three people more aware of the power of coaching, you have had a very successful event!

Networking — which is merely meeting and talking with people — can result in new clients, but often not right away. If you exchange business cards with the people you meet, you can follow up with them the next day by phone or email. A simple note of "I was delighted to meet and talk with you last night" is sufficient. If the person seemed interested in a sample session or more discussion about coaching, and you hadn't asked them for their business yet — do it! You will need to keep in touch with some folks over time and continue to build the relationship. It is also helpful to return to the same networking venue regularly (i.e., for several months) so that you become more familiar to the other attendees.

Remember that networking events are set up for people to meet each other and talk about their businesses, so be sure to listen, and listen like a coach. Don't be overly eager to talk about yourself — the best way to promote coaching is to act in a coach-like fashion which means being over there and listening and asking powerful questions. Don't worry about doing it "right." Instead just get yourself out there, be coach-like and authentic, meet people, and talk about coaching. Over time, you will learn what naturally works for your own style.

Personal Letters and Phone Calls

Your most readily accessible group of potential clients and referral sources are your friends, acquaintances, colleagues, and family. If only half of your personal acquaintances referred one client to you, you'd have a waiting list!

When you are ready to start your business, send a letter (hard copy or email) to all your acquaintances telling them about your new adventure and what a difference coaching is making in your life. The goal of the letter is to get them as excited about coaching as you are, NOT to recruit new clients! No one wants to receive a "sales letter" but your acquaintances will want to hear about this new chapter in your life and how they can help you be successful. The letter should not be too long, no more than one page, and it should not contain lots of detail. You want to enroll, not overwhelm, the reader.

Send out the letters in batch sizes that you can easily manage the follow-up calls, because each letter should be followed by a phone call! Just sending the letter won't do you any good, it's the phone call that will help secure a referral source or potential client.

The intention of your follow-up call is to learn more about where they're at in their lives, and answer any questions they might have about coaching. Reiterate your excitement about what you are doing, and share your vision for coaching. Just as in networking meetings, don't try to explain coaching just do it! Ask powerful questions, help them see something in their life from a new perspective. Also, ask if they would be interested in a sample session. Often if you present it in a way like "One way you can support me is to learn more about coaching in case you meet someone who would benefit from coaching. Would you be willing to have a 30-minute free coaching session — no obligations attached — so that you can experience the coaching process?" Of course, you need to use your own words!

Speaking and Workshops
One of the best ways to get visibility for your business is to speak to groups, large and small. As you begin to explore the various opportunities for networking, you'll discover some groups that might be interested in a speaker for their meetings. Contact them to find out their speaker requirements and how to apply. Get out there and speak about goals, balance, perspectives, values, the Saboteur, procrastination, or any subject that points the audience toward a more fulfilling life and the value of having a coach.

A suggestion is to have some type of drawing, perhaps for a month of free coaching. Audience members will provide their business cards (that you draw from) which will provide you with a record of who was at the event.

Speaking to associations and groups can be hard work, and the assignments are typically pro-bono. It's not a way to make money (unless you speak often enough that you can become a professional speaker) but it's a great way to increase visibility.

Get A Coach
Starting a coaching practice is filled with new and unfamiliar tasks. Your Saboteurs will be working overtime to keep you in your comfort zone and acting small. An experienced coach will help you stay aware of the Saboteur and on the path toward your own dreams. Many potential clients will ask you "Who is your coach?" and "If coaching is so powerful, why don't you have one?" They do have a point!

Dealing With Your Local Requirements

Your business officially starts when you first receive money for your coaching services. At that point, you are a business owner! Congratulations!

As a business, there will probably be some specific local requirements that you should take care of. This might include a business license, fictitious business name permit (which allows you to do business under a name other than your own personal name), or other requirement from either a city, county, province, or state government (or the equivalent).

It's important to note that these requirements, along with the specific names that they are called by, vary location to location. You will need to find out what the specific terminology and requirements are for your location.

You can find out about these requirements by calling your local government offices. Look in the phone book (or for an Internet site) for an "information" number and ask them who to talk to about setting up a business in your area.

An additional resource for U.S.-based coaches is the Small Business Administration's Small Business Development Centers, typically located at select community colleges. These are locations that offer free information and a varying amount of free consulting on how to best set up your business in your local environment.

In Canada, the federal government has teamed up with each province and territory to provide online information to small business start-ups. At Canada Business Service Centres you will be guided through the setup of your business.

Additional Resources

>> For Canadian residents: Canada Business Service Centres: www.bsa.cbsc.org

>> U.S. Small Business Administration www.sba.gov provides free and low cost programs and services

>> SCORE: Counselors to America's Small Business: www.score.org (SCORE works in conjunction with Small Business Development Centers to offer free/low-cost small business start-up consulting)

Handling Your Finances

Setting Fees

Regardless of where you are in developing your business, price yourself in line with your level of experience and expertise and what your target customers will pay. To get coaching experience that will build your confidence and develop you as a coach, you need to coach, coach, coach, and coach some more. While you are in training and learning the skills of coaching, and to encourage plenty of clients, you might start at a fairly low rate such as US$50 or $100 a month for half-hour weekly sessions. As you increase your expertise and experience, and complete your training and certification, raise your rates.

A guideline when getting started is to focus on coaching clients more than coaching revenue. First fill your business, even if you are unsure that you have the "right" fee structure.

An Initial Budget

Here's a secret — a budget does not need to be a complicated, multi-page spreadsheet! You can create your first budget with just pencil and paper. First think about your goal for the number of clients you want each month. When do you want your first client? Second client? How much will you charge these clients each month? Now you can make some broad goals in terms of revenue per month. See — you just created an income projection!

Next, think about your potential expenses — training, travel, telephone, and other startup costs. If you don't know how much you will spend on something, take a guess. Don't let the not-knowing stop you. Just take a guess or estimate and move on.

Put the income with the expenses, and you have an initial budget. See how easy that was! Remember, a budget is a ball-park estimate, it is not meant to be accurate to the dollar. As the months and years roll by, you will gather more information that will make your budgeting easier and easier. It is impossible for your budget to be "right" so don't even go there! Make your best estimates and add information as you learn more.

The Size of Your Practice

The size of your practice will depend on your personal schedule, desires, needs, and coaching style. Some coaches have been known to work with 60 clients, others with five. In both instances this may represent a "full practice" for the coach — it varies coach to coach.

A very general guideline is allotting one work hour each week per client in your practice. So, if you have 20 hours a week that you can devote to your business, the maximum number of clients you might have would be 20. However, in the beginning, while you are still in training and building your client base, the number of clients would be smaller since your energies are mostly focused on your training. In general, when you have completed your training, you will spend about half of your time coaching clients and the other half on marketing, administration, training, planning, and the like.

On average, it takes about 15 months of consistent and focused work to create a full practice. When you think about it, this is not a very long time to get a business up and running.

Many people find it easier to build a part-time practice first, while they are still employed elsewhere. They work with clients in the evenings, early morning or on weekends until they have enough clients to reduce their hours of employment, ultimately quitting their jobs to be a full-time coach.

Invoicing

Invoices can come in all shapes and sizes. An invoice is any kind of document that lets your client know that he/she owes you money for coaching services. It is important to send invoices (by mail, fax, or email) since that is the only legally recognized way to prove that the person owes you money. If you don't send an invoice, your client can legitimately not pay you.

You can send invoices any day of the month that works for you and your clients. Your invoices can be as simple as an email, or can be a Word or Excel document, or a formal invoice created by an accounting program like Quicken or QuickBooks.

You may want to keep a master list of your clients' names and track the dates you send invoices and receive payment so you can do timely follow-up with them.

Collecting Fees

If you coach in person, you can collect your fee at the time of the appointment (before you begin the session). If you work by phone, ask your clients to pay in advance for the upcoming month. In this way the client will not be "voting" about the coaching with their payment. They will have already paid and will be invested in making the coaching work for them.

Invoice well before the month begins and be clear about the payment due date. If your clients have not paid by the time you have a coaching session, make sure to talk with them about it. If you haven't received payment by your second session of the month, postpone the appointment until you have received payment. Remember, you are running a business. If they are committed to the coaching process, then they will be committed to paying for the services.

While you don't want to be totally focused on payments, you do want to be clear and professional with your clients about money. They need to know that they are expected to pay you a certain amount by a certain date. If there is a problem with making the payment, such as an unexpected expense or an emergency shortage of funds, they need to talk with you about it so you can agree to a new payment date.

When the money aspect of the relationship is clean and clear, it doesn't get in the way of the coaching. If you set clear expectations from the beginning (starting in the discovery session or earlier), you will save yourself (and your client) angst and struggle.

Business Bank Accounts
If you are a sole proprietor, you can use your personal bank accounts for your business finances. However, you may find it easier in the long run if you have a separate checking account and a separate credit card to use solely for your business. This allows you to easily keep your personal and business finances separate, a great help when you want to determine how profitable your business is, and also when tax time rolls around.

Don't use your business checking account or credit card for any personal expenses, use it only for business-related expenses. You can track your income and expenses with paper and pencil, when your business is small, or with a program like Quicken or Quickbooks as you grow.

Business Taxes
Your business taxes are based on your business profit, i.e., your business income less your deductible business expenses. If during a given year you don't have any profit, then you don't pay any business taxes.

All business income is taxable — cash, check, credit card, barter. Your business expenses are deductible only if they are directly related to your business, such as a dedicated business telephone line, rent for an office, coaching and business books, office supplies, and the like.

The topic of taxes is a lengthy one. It is recommended that you research what is appropriate for your own financial situation and geographic location. In addition, software programs such as Turbo Tax or Tax Cut in the U.S. can greatly streamline the process of computing and filing taxes.

Additional Resource
>> IRS website: www.irs.gov

Definition of Client

At the Coaches Training Institute, we use the word "client" to refer to the person receiving coaching. What we mean by client is:

1. A person who engages the professional advice or services of another (a lawyer's *clients*), *Merriam-Webster Dictionary*, online version.

2. A customer, or someone who receives services, *Cambridge International Dictionary,* online version.

The Client Relationship

Your relationship with your client is the most important element of coaching. The CTI model for the coach/client relationship is one of "designed alliance." You and your client, working together, design the relationship that will best support and empower your client.

Some Client Guidelines

Be professional and clear with your client at all times. Be a coach, and coach them through whatever breakdowns occur in the coaching — it is possible to learn and grow from everything that comes into the coaching. If they are consistently late, miss sessions, don't pay on time, don't do their homework, look with them to see what is in the way. Be willing to draw the line and be very direct with them when what they are doing doesn't work, for them or for you. Chances are, whatever behavior you are seeing in the coaching relationship shows up in other aspects of their life. If you interact with your clients in a straightforward manner at these times, your clients will trust you and the relationship will be empowered.

The Initial Session (Discovery Session)

Your initial appointment with a client is called a foundation session or discovery session. These appointments vary in length, though they are commonly two to three hours long (sometimes split across multiple sessions). Some coaches use multi-day in-person appointments, so there is a wide variety of formats.

It is important to be organized in your initial work with your client. This establishes a professional tone for your relationship. You may have a questionnaire and information packet that you send them once you have established your first appointment. Send this packet to your client at least a week before the discovery session so that they have plenty of time to do the reading, fill it out, and send it back to you before the appointment.

The most important aspect of the discovery session is to create relationship with the client and design the alliance. Here is a list of some common ingredients in an Initial Packet/Session:

1. Client information such as name, mailing address, phone numbers, birthday, family members, employer, etc.

2. Information about who the client is, e.g., Values Clarification, Life Purpose, Passions.

3. What the client wants from coaching such as goals, objectives, or personal development areas they would like to address in coaching.

4. What's going on in the client's life right now? What challenges are they facing? Where are they in or out of balance in their life?

5. Design the alliance: How do they want you to be as their coach? What kind of support do they want from you? Ask for permission to intrude, challenge, and hold them accountable.

6. Train the client how to be in coaching: Requesting, ongoing design of the coaching relationship, open and honest communication.

7. Relationship logistics: review the coaching agreement, set clear expectations about fees, invoices, payments, who calls who, scheduling process.

8. Agree on any next steps or any homework.

9. Collecting payment for the sessions (if you haven't done this already).

Experiment with your discovery session to determine what works best for you and your clients. In the beginning, give a range of time for the appointment such as 2 to 2 $^{1}/_{2}$ hours, until you get a sense of what you want to include and your own timing. When designing your initial packet and session, good questions to ask yourself are "What do I need to do to establish a solid alliance with this person?" "What do I need to know about this person so that I can coach them effectively?"

It is important that the client take responsibility for the coaching relationship right from the beginning, so make sure your agreements are clear, and that the client has ownership for the relationship. Many coaches have a client sign a coaching agreement or contract that details what coaching is, fees, expectations regarding payment, session cancellation, notice for termination, and the like.

Remember that you are a professional, you are running a business, and you are establishing a professional relationship (even when you are doing pro-bono work). Do whatever you need to do to create an environment of professionalism and set clear expectations. This doesn't mean that you can't be your natural warm, loving self but rather that you set the tone of having a business relationship.

Tracking Your Hours for Certification

Certification through an ICF credentialed coaching program like CTI's and an additional coaching credential through the ICF are becoming more and more important in the industry. If you are interested in becoming a certified coach, it is important to track all of the hours that you spend coaching or being coached *from the very start of your practice*. There is software available on the market to help you with this aspect of your business, or you can create a spreadsheet to track this information for yourself.

The ICF accepts the hours you coach *from the start of your practice* toward their credentialing requirements. As of the writing of this manual, they require that you track the following information for your clients (please check the ICF web site for current information):

1. Client name.
2. Contact info of the client.
3. Start and end dates of the relationship.
4. Total coaching hours (paid and pro-bono) within that relationship.

Once you have completed CTI's Core Coaching Curriculum, you are eligible to sign up for the Certification Program. Refer to page 1-7 of this manual or to CTI's web site at www.thecoaches.com for more information about the Certification Program. *During this program only* you will need to track some additional client information:

Hours per week broken out by:

1. Hours you coach clients (pro-bono, paid hours, and discovery session hours listed separately).
2. Hours you are coached by a certified coach.

If you are serious about coaching, CTI encourages you to become a Certified Professional Co-active® Coach (CPCC) because the CTI program deepens your understanding and practice of the Co-active model while challenging you to keep rigorous accountability around maintaining clients. You'll get in-depth and personalized feedback about your coaching from the supervisors in the program, solid training, and lots of practice coaching. Andy Denne, former student of certification, says, "I thought I was a good coach until I went into certification, now I'm a great coach. Certification provided a direct payoff to clients and I doubled my income last year."

After you've completed your CPCC, we encourage you to further your professional development as a coach by gaining an ICF credential. The ICF is the professional association of personal and business coaches that seeks to preserve the integrity of coaching around the globe. It supports and fosters development of the coaching profession, has programs to maintain and upgrade the standards of the profession, credentials coaches, and conducts international conferences and other educational events for coaches. Please refer to their web site at www.coachfederation.org for more information about the organization.

The Coaching Session

The client always calls the coach. This encourages them to take responsibility for the coaching.

The client is responsible for the session's agenda. You can have them prepare one ahead of time and send it to you, or you can just dance in the moment with what shows up. In either case, the client should think about the appointment in advance, and make notes of what they want to discuss or accomplish in the session. If a client consistently comes unprepared, talk with them about this, and jointly determine ways to address the issue.

During the session you will be making requests of the client and asking powerful questions. If you find that you are struggling to keep the session moving, then you are doing too much of the work. Ask the client what is going on. What is it that they want to accomplish from the session?

You may find it helpful to take notes from each session, but it isn't necessary to have pages of detailed notes. Notice how much of your attention is focused on your notes rather than over there with the client. At a minimum, write down any homework, inquiries, goals, or any other important events or commitments that you want to track session to session.

You are responsible to manage time for the session, and begin and end your sessions on time. Some coaches schedule clients back-to-back to reinforce ending on time. Other coaches schedule in a short break between clients. Find what works best for you.

Outside the Coaching Session

If a client needs extra accountability or a structure to stay in action, one idea is to have them leave a voicemail that an action item has been started and/or completed. This is called "book-ending" and is a very useful structure. You can also have clients use voicemail or email as a place to make daily commitments, celebrate a win, vent, or provide a progress check.

Creating Your Schedule

Starting with your first client, be mindful of how the sessions are scheduled into your life. Many coaches have specific days and time slots that they coach in, such as Monday and Wednesday mornings. Arrange your appointments so that you are able to be in a centered, calm place for each client and also so that the remainder of your life is not disrupted. Be willing to say "no" to those clients who want you to coach at times when you have other commitments. In this way you'll be modeling behavior of a balanced life and clear boundaries.

Ensure that your schedule includes breaks! Both on an hour-to-hour basis and also month-to-month. Once a quarter there is a month that includes 5 weeks. Many coaches take the 5th week off from coaching clients.

A tip is to ensure that your family, friends, and neighbors are aware of your general schedule. Often when folks know that you work at home, or when family members see you at home, they assume that you are available at any time. Create a daily or weekly schedule to post in a visible location to let your family know when they can and can't interrupt you. In other words, design your alliance with your house-mates, family, friends, and neighbors to minimize distractions and intrusions.

Letting Go of a Client

In the coaching relationship, you need to be able to tell your client the truth and do your job in an open, straightforward manner. To do this, you need to be willing to lose a client. Don't tiptoe around topics. Be straight and firm, though always with compassion. For the most part, clients will appreciate and value this kind of relationship with you. You are not trying to be the client's friend, rather you are their coach.

There are times when a client should not be in a coaching relationship such as when the issues they are facing are more appropriate for therapy or business consulting. It's important to recognize when it is best to refer your client to another resource, and act on it (i.e., refer your client and stop coaching with them). However, coaching can often work well in conjunction with psychotherapy, career counseling, business consulting or other kinds of professional support.

Sometimes, the chemistry between you and your client just doesn't work, or the client is looking for a different style of coaching. This is not a personal judgment, just a recognition that coaching is not a "one-size-fits-all" type of service.

In all of these situations, it will be important to be able to let go of a client and refer them to a therapist, business consultant, or another coach who might be more appropriate for them at this time in their life.

Invest in Yourself So That You Can Invest in Your Clients

By pursuing your own balanced and fulfilling life, you are also ensuring that you are better equipped to help your clients do the same. Recognize that you are a model for your clients. If you are overextending yourself and not taking care of yourself, it will affect the quality of your coaching and affect your business. You'll find yourself having a hard time getting and keeping clients, feeling exhausted, and wondering if you are a "bad" coach. The truth is that you have not been paying attention to your own needs. If you don't spend enough energy and time on yourself, you won't have enough to spend on your business or your clients! Here are some tips to help you stay in balance.

>> *Hire a Coach.* Every coach needs to have a coach. This is especially important during the beginning stages (1-2 years) of building your practice. Most new coaches have never been self-employed and don't realize how hard it can be to stay focused and motivated. A seasoned coach serves two purposes: one is to help you learn what to do and make progress toward your goals, the second is to be a model for your own coaching skills. By being a client, you intimately learn what your clients are going through. Find a coach that is a seasoned entrepreneur and powerful coach.

- *Get support*. Friends, family, colleagues, fellow coaches, other entrepreneurs and small business owners — they are all potential sources of support. Starting your own business can be a lonely endeavor. As humans, we are social animals and we need an amount of social interaction. Staying in touch with the other participants in your CTI classes and joining your local ICF chapter are both excellent ways to build a coaching-related support network. Build up relationships where you can call each other during a rough day, celebrate a success, or just "shoot the breeze" and unwind.

- *Continue to grow*. As with all humans, it is important for coaches to continue growing and learning new things. The more in touch you are with yourself and your process, the better you will be able to serve your clients. Many coaches find that participating in some type of daily or regular practice — spiritual, physical, social — helps them to be grounded, growing, and peaceful. The key is to find what works for you, realizing that there is no "there" to get to, it is all a journey and process.

About This Document
Pages 3-1 through 3-20 of this section were written by Dorcas Kelley, CPCC, ACC, CMC, www.thebusinessofcoaching.com.

BEING AN INTERNAL COACH

More and more companies are hiring internal coaches and creating a coaching culture within their organization. The term "internal coach" describes a coach who is employed by an organization to coach fellow employees. As with all things, there are both benefits and challenges to being an internal coach. We've outlined some of them for you in this section. Whether you are considering being an internal coach, or you are one already, this section will give you an overview of what it takes and some things to be aware of along the way. Each company has its own culture and politics, so in addition to the information shared here, be aware of how that impacts you and your clients in order to work effectively and successfully within the organization.

Success TIP: Find a champion in a position with some authority who can back you and help set you up in the organization — someone who will see the merits in coaching and fund it. They will help you formalize your opportunities and your role in the organization.

Designing Your Alliances

When you are an internal coach, you are paid by your employer rather than your clients. The benefits to being an internal coach include a regular paycheck, company benefits, and no need to market your services outside the company. Don't imagine you will not have to market yourself and your services. Marketing to internal clients is a different animal, but it's still marketing. Being paid by your employer rather than your client is one of the biggest differences from being a coach with a private practice and it also presents some of the greatest challenges. It's critical to be rigorous about defining who your client is, and to design and redesign the multiple alliances in every coaching relationship.

A formal role and structure within the company to contain the coaching relationship may or may not exist. Because the company is paying you and not the client, it's important to design your alliance with the company up front when you first start your position so you are clear on what the priorities are, and what is and isn't confidential with your clients. Be clear right from the start who the client is — is it the individual you are coaching, or the company, or your boss? You'll need to set up multiple alliances with each client you work with, including the company, the client, and possibly the client's boss. Also be clear about who you will coach and what you will coach. As you set yourself up as an internal coach, be sure you have the company's blessing to work with the client's whole life, and/or do your best to get that. The company needs to know that clients may go one of two ways as a result of the coaching — become more committed and productive or quit and go to something different.

If a manager does come to you with the request to coach their employee, clearly define the boundaries of the coaching relationship with the manager. A possible trap for you as an internal coach is when a manager approaches you to coach an employee with a performance problem. That's actually a managerial problem, not a coaching issue. If an employee comes to you wanting to be coached, find out whether or not there are company or department guidelines for establishing a coaching relationship. check in about what their manager would think and ask the employee to let their boss know about it. Sometimes the boss needs to be consulted first and sometimes they don't, especially with senior employees in the organization. It could be the company or department has guidelines already or they may want you to help set them up. The bottom line is, don't make any assumptions. Be clear about the culture, the organization, and the expectations. Stay within those company guidelines and design your alliances from there.

Working internally, you'll need to be attentive to the demand of the other job responsibilities on the client. A boss may require your client to attend a meeting or finish up a project on deadline rather than attending his or her coaching session. Be really clear in designing your alliances with your client especially around travel, vacations, scheduled appointments, and other responsibilities. It can be tricky territory for you as the coach. You'll need to be flexible, and yet avoid the trap of getting too loose about appointments, because coaching will fall off the radar screen. Overwork can be a client's Saboteur helping them to avoid the coaching. Set parameters. Really nail down their commitment to the coaching. Be willing to check in with them often about it. So set up accountability with your client in a way that takes all this into consideration and redesign it as often as is needed.

Coaching Teams

Working in an organization, you may get the opportunity to coach an intact project or management team. We are seeing more and more of a demand for this in organizations. Again it's critical to establish who the client is. Is it the team itself as a whole entity, or the manager of the team, or the person the team manager reports to? Design your alliances clearly. When designing initially with the team manager — ask what are the outcomes they are looking for over time? Will it be most effective to coach the team as a whole or each individual team member? Set a length of time for the commitment to the coaching — 3, 6, 9 months, etc. Make sure all parties are involved in designing your alliances so everyone is clear about what information is going to be shared with whom.

When coaching teams, something to watch out for is the number of alliances you are designing and holding. If you are coaching the team as a whole, then each individual member of the team is held as an expression of the team. If you are asked to coach the team as a whole, the team manager(s) as well as the members of the team, you could be holding 10 or more coaching relationships within the same group and it can get very messy. Because you are coaching so many different pieces of the same group, conflicts of interest are likely…at least in the perception of your clients. If you are coaching the team as a whole, it is best to have another coach for the individual members of the team and vice versa. Then you can be in the corner of the group or individual that you are coaching.

Sometimes it's not possible to have more than one coach. In that case, look for the way to have the most impact on the group. For instance, coach the team as a whole and the team manager or managers. It's critical to frequently review and redesign your alliances with all parties, and at the end of each session ask, "What about today's session can be taken to the rest of the team?" and "What about today's session is confidential?" Then take good notes about it in every session, and remind yourself and those you're coaching often, who the client is and what the designed alliances are.

Risks and Pitfalls

Politics and collusion are potential traps for the internal coach. Handling multiple relationships and designed alliances can be tricky. Self management and confidentiality are crucial. You have to take a stand for your client even if it rocks the boat of the organization. To be effective, you have to be willing to risk your job for the sake of the client. One way to set a professional standard as well as support your own development and prevent burn-out, is to receive regular coaching supervision. Because of confidentiality issues, this is frequently arranged via supervisors *outside* of the corporation.

Don't let the "story" of the company run your coaching — whether it's "we all have too much to do" or something else. Learn what the organizational Saboteurs are and be conscious of them in your coaching.

Do not fall into the trap of giving advice. Many organizations are used to consultants, so you may need to educate them about what a coach does and doesn't do. They so want advice, it can be very seductive. If you get into the habit of giving it, pretty soon you may not have any advice left to give and the client will not have developed their own research and decision-making skills. If you are in a coaching relationship where you are also a mentor or consultant, be clear about what role you're in at any particular time, and keep the coaching alive.

Other Opportunities For Impact

Be a model and educate others by using coaching skills in every conversation and interaction in the organization.

Create informational brown bags for employees around work/family balance, stress management, making choices, or any other topic that would serve the culture of the organization. You can help create a culture for people to say no if they are overloaded, and to better balance work and family.

You may also have the opportunity to coach employees around 360 degree feedback tools or other assessment tools the organization may use. These take feedback to the next step — once the employee gets the feedback, you can coach them about their impact on others in the organization and on how to create something different or better for themselves and others. Many assessment tools require specific training and formal certification to administer with integrity. Even if you're not introducing the tool to the organization, be sure you understand it within the context of the work your clients are doing.

In Summary

Hold confidentiality, be clear about who your client or clients are, design your alliances well, find a champion within the organization, make sure you have the training and support that you need, set up coaching supervision for yourself, and remember that you can make a difference to both your individual clients and to the organization as a whole.

Professional ethics are crucial to any service business. Ethics refers to an agreed upon set of moral principles or values, or rules of conduct. Professional ethics is a broad topic that includes personal conduct, professionalism, confidentiality, client referral to a therapist or consultant, and conflict of interest. CTI subscribes to the Ethical Guidelines of the International Coach Federation (ICF) and has its own Suggested Rules of Correct and Honorable Conduct as well. In addition to reviewing these two documents, which follow below, it's also important for you to take the time to develop ethical guidelines for your own coaching practice.

International Coach Federation (ICF) Code of Ethics

The following ICF Code of Ethics are taken directly from the ICF web site at www.coachfederation.org in July 2009. CTI highly recommends that all coaches become members of the ICF. Go to their web site for more information and for updates to these guidelines.

Part One: Definition of Coaching

Section 1: Definitions

>> *Coaching*: Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

>> *A professional coaching relationship*: A professional coaching relationship exists when coaching includes a business agreement or contract that defines the responsibilities of each party.

>> *An ICF Professional Coach*: An ICF Professional Coach also agrees to practice the ICF Professional Core Competencies and pledges accountability to the ICF Code of Ethics.

In order to clarify roles in the coaching relationship, it is often necessary to distinguish between the client and the sponsor. In most cases, the client and sponsor are the same person and therefore jointly referred to as the client. For purposes of identification, however, the International Coach Federation defines these roles as follows:

>> *Client*: The "client" is the person(s) being coached.

>> *Sponsor*: The "sponsor" is the entity (including its representatives) paying for and/or arranging for coaching services to be provided.

In all cases, coaching engagement contracts or agreements should clearly establish the rights, roles, and responsibilities for both the client and sponsor if they are not the same persons.

Part Two: The ICF Standards of Ethical Conduct

Preamble: ICF Professional Coaches aspire to conduct themselves in a manner that reflects positively upon the coaching profession; are respectful of different approaches to coaching; and recognize that they are also bound by applicable laws and regulations.

Section 1: Professional Conduct At Large

As a coach:

1. I will not knowingly make any public statement that is untrue or misleading about what I offer as a coach, or make false claims in any written documents relating to the coaching profession or my credentials or the ICF.

2. I will accurately identify my coaching qualifications, expertise, experience, certifications and ICF Credentials.

3. I will recognize and honor the efforts and contributions of others and not misrepresent them as my own. I understand that violating this standard may leave me subject to legal remedy by a third party.

4. I will, at all times, strive to recognize personal issues that may impair, conflict, or interfere with my coaching performance or my professional coaching relationships. Whenever the facts and circumstances necessitate, I will promptly seek professional assistance and determine the action to be taken, including whether it is appropriate to suspend or terminate my coaching relationship(s).

5. I will conduct myself in accordance with the ICF Code of Ethics in all coach training, coach mentoring, and coach supervisory activities.

6. I will conduct and report research with competence, honesty, and within recognized scientific standards and applicable subject guidelines. My research will be carried out with the necessary consent and approval of those involved, and with an approach that will protect participants from any potential harm. All research efforts will be performed in a manner that complies with all the applicable laws of the country in which the research is conducted.

7. I will maintain, store, and dispose of any records created during my coaching business in a manner that promotes confidentiality, security, and privacy, and complies with any applicable laws and agreements

8. I will use ICF member contact information (e-mail addresses, telephone numbers, etc.) only in the manner and to the extent authorized by the ICF.

Section 2: Conflicts of Interest

As a coach:

9. I will seek to avoid conflicts of interest and potential conflicts of interest and openly disclose any such conflicts. I will offer to remove myself when such a conflict arises.

10. I will disclose to my client and his or her sponsor all anticipated compensation from third parties that I may pay or receive for referrals of that client.

11. I will only barter for services, goods or other non-monetary remuneration when it will not impair the coaching relationship.

12. I will not knowingly take any personal, professional, or monetary advantage or benefit of the coach-client relationship, except by a form of compensation as agreed in the agreement or contract.

Section 3: Professional Conduct with Clients

As a coach:

13. I will not knowingly mislead or make false claims about what my client or sponsor will receive from the coaching process or from me as the coach.

14. I will not give my prospective clients or sponsors information or advice I know or believe to be misleading or false.

15. I will have clear agreements or contracts with my clients and sponsor(s). I will honor all agreements or contracts made in the context of professional coaching relationships.

16. I will carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement or contract.

17. I will be responsible for setting clear, appropriate, and culturally sensitive boundaries that govern any physical contact I may have with my clients or sponsors.

18. I will not become sexually intimate with any of my current clients or sponsors.

19. I will respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement or contract. I will be alert to indications that the client is no longer benefiting from our coaching relationship.

20. I will encourage the client or sponsor to make a change if I believe the client or sponsor would be better served by another coach or by another resource.

21. I will suggest my client seek the services of other professionals when deemed necessary or appropriate.

Section 4: Confidentiality/Privacy

As a coach:

22. I will maintain the strictest levels of confidentiality with all client and sponsor information. I will have a clear agreement or contract before releasing information to another person, unless required by law.

23. I will have a clear agreement upon how coaching information will be exchanged among coach, client, and sponsor.

24. When acting as a trainer of student coaches, I will clarify confidentiality policies with the students.

25. I will have associated coaches and other persons whom I manage in service of my clients and their sponsors in a paid or volunteer capacity make clear agreements or contracts to adhere to the ICF Code of Ethics Part 2, Section 4: Confidentiality/Privacy standards and the entire ICF Code of Ethics to the extent applicable.

Part Three: The ICF Pledge of Ethics
As an ICF Professional Coach, I acknowledge and agree to honor my ethical and legal obligations to my coaching clients and sponsors, colleagues, and to the public at large. I pledge to comply with the ICF Code of Ethics, and to practice these standards with those whom I coach.

If I breach this Pledge of Ethics or any part of the ICF Code of Ethics, I agree that the ICF in its sole discretion may hold me accountable for so doing. I further agree that my accountability to the ICF for any breach may include sanctions, such as loss of my ICF membership and/or my ICF Credentials.

Approved by the Ethics and Standards Committee on October 30, 2008.

Approved by the ICF Board of Directors on December 18, 2008.

CTI Suggested Rules of Correct and Honorable Conduct

We subscribe to the Ethical Guidelines of the International Coach Federation.

In addition, we adhere to the following guidelines:

1. We hold the content of the relationship with our clients as confidential. Even the names of our clients are confidential unless the client gives permission to mention or use his/her name.
2. As professional coaches we do not break the law for our clients. We do not act as accomplices to our client's illegal activity.
3. As professional coaches we do not enter into financial agreements with our clients based on results of the client; i.e., the client will give you a 10% bonus based on the sales bonus they receive from their corporation. To take such an action is the clients' option but the coach does not count on it.
4. When we enter into agreements with corporations, we hold the individuals as our clients, and respect their right to confidentiality.
5. We do not work with clients who we cannot champion and see their growing edge.
6. We manage our own Saboteurs in such a way that it does not deter the client's progress and enables us to hold the client's agenda, rather than the coach's agenda.
7. We treat our colleagues, competitors and the coaching profession with honor and respect.
8. We agree to hold the client's (A)genda and (a)genda so as to point the client to Fulfillment, Balance, and Process as well as Forwarding the Action and Deepening the Learning.
9. We align with the belief that clients are naturally creative, resourceful and whole, capable of finding their own answers.

The Coach/Client Agreement

It's important to educate your client about what coaching is and isn't in the very beginning of the relationship. Include information in your initial coaching session and in your coach/client agreement both to ensure that your client understands what kind of relationship they are agreeing to and to protect yourself in the event that any questions come up later on in the coaching relationship. Following are sample paragraphs that you could include in your coach/client agreement to help clarify that the client is entering a coaching relationship and that it is not therapy:

>> I understand that life coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.

>> I understand that life coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that life coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of therapy.

>> I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with the life coaching relationship.

>> I understand that feelings are a normal and healthy part of being human and that through the coaching relationship, awareness and curiosity will be brought to my feelings so that I can make more informed choices and move into my desired action. I understand that coaching does not deal with the psychological antecedent to emotions — that is the realm of therapy.

Coaching vs. Therapy: What Are the Differences and When Do You Refer?

Two of the most frequently asked questions of new coaches are, “What is the difference between coaching and therapy?” and, “When do I refer a client to a therapist?” There are many resources available to help answer these questions. Articles have been written on these topics in several coaching publications including *Choice* Magazine (www.choice-online.com), and the ICF has information about it on their web site, at www.coachfederation.org.

Tears and emotion can be scary for the beginning coach. Tears and emotion do not necessarily mean a person needs therapy, it merely means they have feelings. Feelings are a normal and healthy part of being human. As Co-active® Coaches we bring awareness and curiosity to the emotions of our clients so that they can make better choices and move into action. We are present with our clients in the current expression of their emotions and bring curiosity to that place, whether it’s in our client’s magnificence or in the challenging places of their inner and outer lives. As coaches, we don’t deal with the psychological antecedent to the emotion — that is the realm of therapy. If tearfulness, moodiness and depression continue over time and do not end, then the coach should bring this to the attention of their client and together explore the need for outside therapy.

Discovering that there is something that should be addressed by therapy is a positive coaching outcome, and as coaches, we refer clients to therapy when needed. There are many possible scenarios in this situation — one is that the coach holds the client accountable to finding a therapist and completes the coaching. Another is that the coach, client and therapist design an alliance whereby the coaching continues and the client works with a therapist at the same time.

Following is some information about the differences between coaching and therapy and also some guidelines for when to refer to therapy. The information below is a small part of what is available industry wide. We recommend that in addition to reading this, you do your own research on these topics.

Differences Between Psychotherapy and Coaching

Coaching	Therapy
Views both parties as naturally creative, resourceful and whole. Does not diagnose or treat.	More apt to view clients from a medical model. Diagnoses and treats.
Trained to work with functioning clients. illness.	Trained to work with major mental
Works with clients that are able to form an alliance and have common goals.	Works with clients with entrenched problems.
Co-active® model.	Therapist the "expert."
Coach and clients on a peer basis.	Hierarchical difference between therapist and clients.
Alliance designed by coach and client together.	Treatment plan largely designed by therapist.
Focus on evolving and manifesting potential.	Focus on healing and understanding.
Emphasis on present and future.	Emphasis on past and present.
Action and being oriented.	Insight oriented.
Solution oriented.	Problem oriented.
Explore actions and behaviors that manifest high self-esteem.	Explore genesis of behaviors that create low self-esteem.
Regard and coach negative self-beliefs as Saboteurs (temporary obstacles).	Analyze and treat origins and historical roots of negative self-beliefs.
Coach and client ask: "What's next/what now?"	Therapist and client ask: "Why and from where?"
Works mainly with external issues.	Works mainly with internal issues.
Discourages transference as inappropriate.	Encourages transference as a therapy tool.
Accountability and "homework" between sessions held as important.	Accountability less commonly expected.
Contact between sessions for accountability and "wins" expected.	Contact between sessions for crisis and difficulties only.
Uses coaching skills.	Uses therapy techniques.

It should also be acknowledged that the difference between some types of therapy and personal coaching aren't always clear-cut. Many therapists are "coach-like " in their orientations and the two do share some common ground.

Both disciplines can be working with fully functioning individuals/couples who are facing difficult situations. Both professions focus on helping people makes changes and accomplish goals that really matter to them. Let us examine some of the similarities.

Similarities Between Psychotherapy and Coaching

Coaching	Therapy
Uses a "Discovery Session."	Uses a Diagnostic Interview/History.
Uses many skills similar to therapy.	Uses many techniques similar to coaching skills.
Works with the client's whole life.	Works with client's whole life.
May work with emotional material.	Often works with emotional material.

Having looked at some of the differences and similarities, we assert that there are a few very important discerning questions to ask client and professional to further clarify this issue. Often the difference between the two modalities rests more in the "stances" of the two professions than in the techniques used.

>> How is the client viewing the professional?

>> What is the client coming for?

>> How is the professional viewing the client?

>> What is the role the professional sees for him/herself with this client?

As two professions working side-by-side, it is important to appreciate both our similarities and our differences and to continue respectful dialogue. As coaches we are also ethically bound to develop guidelines for when to refer to therapy. In addition to being aware of Coaching Standards of Conduct and Ethics, we encourage coaches to develop guidelines for referral. Below are some guidelines or "red flags" we have identified:

Guidelines for Referral to Therapy

>> The client has an active mental illness (depression, acute anxiety, etc.)

>> The client has a substance abuse problem

>> The client is in a situation characterized by emotional or physical abuse or threats of abuse*

>> The client has mentioned thoughts of suicide or attempted suicide*

>> The coach feels as if (s)he is coaching outside his/her limit of competency

>> The client shows no movement

* In some states/countries there are laws that require breaking confidentiality and reporting attempted suicide and/or abuse (especially child abuse) to specific agencies. Know the laws in your area.

Section 4

Resources & Tools

The list that follows is a sampling of some of the many skills and competencies in a Co-active Coach's tool kit. A definition of these skills and others can be found in the Glossary of the Co-Active Coaching book or in the interactive glossary on the Fundamentals Blended Learning web page.

>> Accountability

>> Acknowledgment

>> Articulate What is Going On

>> Asking Permission

>> Bottom-Lining

>> Challenging

>> Championing

>> Dance in the Moment

>> Enrollment

>> Hold the Client's Agenda

>> Holding the Focus

>> Inquiry

>> Intrude

>> Intuition (Blurting)

>> Metaphor

>> Meta-view

>> Powerful Questions

>> Reframing

>> Requesting

>> Take Charge

DESIGNING AN ALLIANCE

The designed alliance provides the "container" in which coaching takes place. Client and coach design the container so that it is customized to specifically meet the needs of a particular client. It is also a dynamic container, capable of changing over time so that it will continue to meet the client's needs — not become obsolete. Much of the coaching alliance happens in the initial discovery session between coach and client. The purpose of the designed alliance is to:

>> Create a safe and courageous space for clients.

>> Establish client trust of coach.

>> Help the coach know how to work with the client in a manner that empowers the client.

While each coach will develop their own unique style over time, here are some guidelines to get you started. This conversation can take anywhere from 10 minutes to an hour.

1. Set the stage for the client. Coaching provides a unique opportunity to create a relationship by design, remember this concept is new to many of your clients. Help them out by telling them what to expect.

   "One of the unique aspects of our coaching relationship is that it is a relationship of design. You are creating me as your coach, your ally, your champion. What we are going to do next is spend some time having you design how I can best work with you. You may already have some ideas of how you want me to be with you around certain areas. There may also be some places you are not yet sure how you want us to be. We will use this time to lay some groundwork. As we work together we will continue to create how we want to be with each other. How does that sound?"

2. Begin the design. The coach takes notes and prompts the client with questions as needed. Some clients already have ideas about what they would like. Start there.

   Here are some questions to ask the client:

   >> *"How do you want me to coach you?"*

   >> *"What are you looking for in a coach?"*

   >> *"What else?"*

   >> *"If this coaching were to have a huge impact in your life what would it look like?"*

3. As the client answers generally, begin taking the questions into specifics.

   >> *"How do you stop procrastinating in your life?"*

   >> *"What is the best way for me to confront you?"*

   >> *"What are some of the things your Saboteur says to you?"*

   >> *"How do you want me to be when you have not completed something you agreed to complete?"*

4. During this portion of the discovery session, it is appropriate for the coach to speak about what is important in the relationship for them. It is the coach's opportunity to ask for what he or she wants from the client.

   "My style is pretty direct. I like to call things as I see them. For example if I see that you are selling out on a top value of yours I might say…Wait a minute Fred. I'm not buying it. I know that authenticity is one of your top values and what you just said doesn't fit with how you have been in the past. What's really going on here? "Do I have your permission to be direct?"

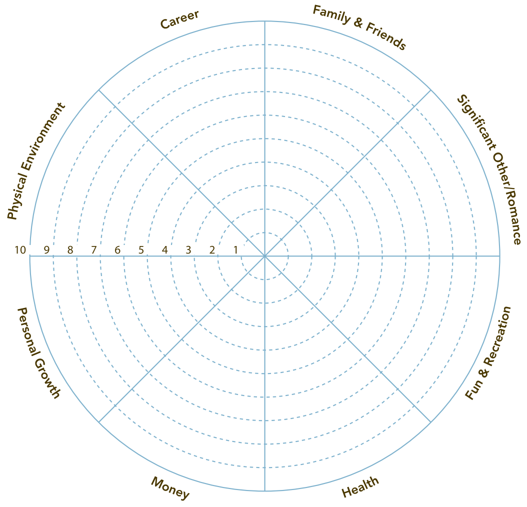
   Remind the client that the process continues throughout the relationship and encourage the client to redesign over the course of the coaching relationship.

   "We have a great start here in how we will work together. I want you to know that this does not stop here. I invite you to keep designing me as we go along. From time to time in the future, you will hear me check in and ask permission to tweak and change things. Will you continue to look at how we work together and give me feedback?"

   You will learn about other aspects of the discovery session in the Fulfillment Course.

THE WHEEL OF LIFE

The Wheel of Life provides a unique model for clients. The wheel shows clients what balance in their life looks like. Coaches use this tool with clients in the discovery session, sample sessions and to get a sense of fulfillment in the client's life.



Using the Wheel of Life in a coaching session:

1. Briefly explain the wheel and what it signifies to your client.

   The wheel of life is a tool coaches use to get a snapshot of how satisfied a client is in their life. There are eight areas on the wheel. You may want to change the categories to reflect the areas of your life.

   For example: The client may choose to break the category of friends and family into two separate categories. The client may wish to add a category.

2. Ask the client to rate their level of satisfaction in each of the areas.

   >> *"I am going to ask you to rate your level of satisfaction in eight areas of your life. Zero means not satisfied and 10 means highly satisfied."*

3. After the client has rated each of the areas. Ask them to connect the lines to form an inner wheel. This gives the client an overview of balance in their life.

   >> *"Remember, this is not about getting 10s ! It's about a smoother ride."*

   >> *"If this wheel were a tire on your car, how bumpy would the ride be?"*

   Listen to the client's response and then move to step 4.

4. Ask the client, What area would you like coaching on? Or what area are you ready to make a change in?

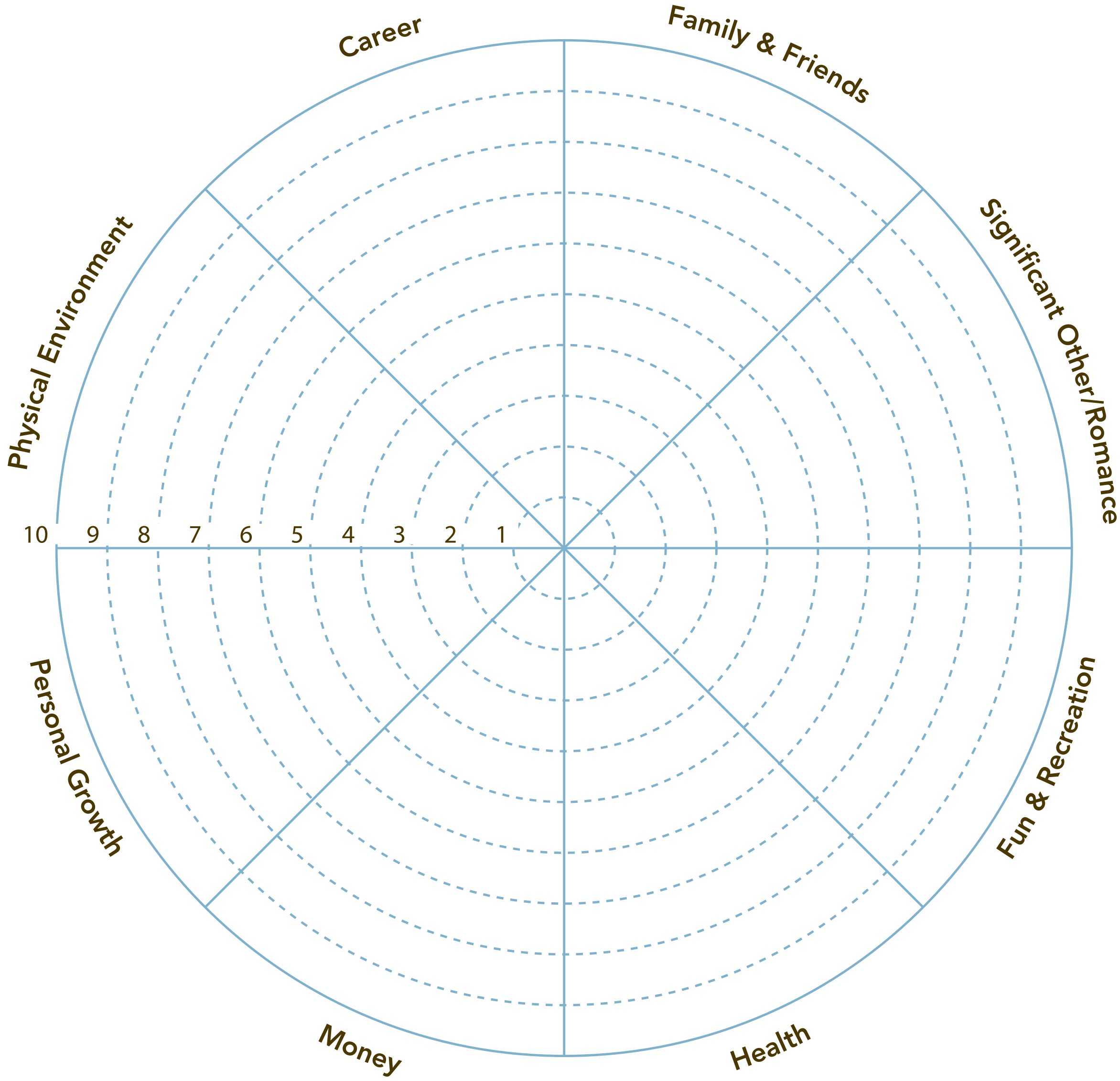
   Once an area is selected, continue to ask powerful questions to move the client forward.

5. Wrap up the coaching session by making a request, or by giving the client a homework assignment.

6. Be sure to hold the client accountable. What will you do? When? How will I know?

Directions

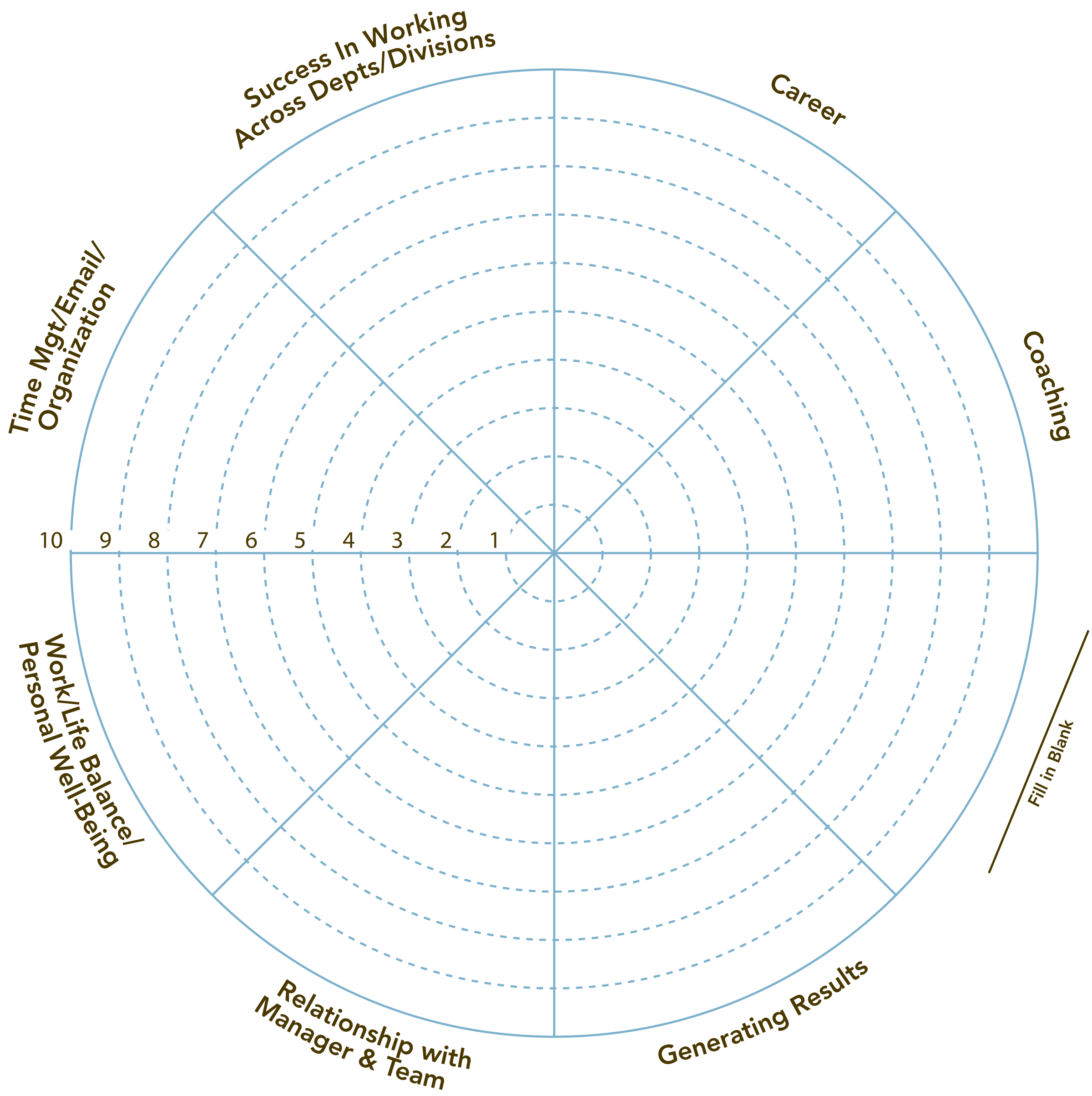
The eight sections in the Wheel of Life represent different aspects of your life. Seeing the center of the wheel as 1 and the outer edges as 10, rank your level of satisfaction with each life area by drawing a straight or curved line to create a new outer edge. The new perimeter represents the wheel of your life. If this were a real wheel, how bumpy would the ride be?



THE PROFESSIONAL WHEEL OF LIFE (FORM)

Directions

The eight sections in the Professional Wheel of Life represent several different aspects of your professional life. Seeing the center of the wheel as 1 and the outer edges as 10, rank your level of satisfaction with each area by drawing a straight or curved line to create a new outer edge. The new perimeter represents the wheel of your professional life. If this were a real wheel, how bumpy would the ride be?



Peak Experience

Values are who we are. Values represent our unique and individual essence, our ultimate and most fulfilling form of expressing and relating. Our values serve as a compass pointing out what it means to be true to oneself. When we honor our values on a regular and consistent basis life is good, life is fulfilling.

In the Fulfillment Course, you will learn several ways to discover client's values. Here is one way to get you started as you begin working with clients.

1. Ask the client to identify special, peak moments when life was especially rewarding or poignant. It's important that the time frame be quite limited — as in the moment. This allows the client to be more specific.

   "Get comfortable in your chair, close your eyes, and imagine a time in your life when life was sweet. A moment when life was particularly poignant and rewarding. Notice where you are. Who is with you? Notice the quality of the light. Notice the sights and sounds and smells. And when you are ready bring that experience back here with you and open your eyes."

2. When the client has a specific moment in mind, start probing.

   "What was happening? Who was present? Tell me about the experience."

3. As the client is speaking listen underneath what they are saying for values. Acknowledge what you are hearing and keep probing, periodically testing words to see what the client responds to.

   "That sounds like a huge win. It sounds like accomplishment is really important to you?" or "What a special day. It sounds like you were honoring nature and enjoyed being connected."

4. Listen for an energy hit with the client. You may hear a change in the client's tone of voice. You may sense a shift in their energy; the client may shift from simply reporting an experience to sounding alive and joyful. When you notice the shift — explore what is there that brought the shift.

5. Ask the client to expand on the each value.

   "What words elaborate on your value of connection?"

6. Continue having the client look at peak moments, seeking experiences the client found particularly rich and fulfilling.

Remember that the words are just identifiers; the experience of being in touch with and honoring the value is what you want to create with your client.

USING YOUR INTUITION

In addition to the customary five senses that help inform us about our environment, there is a sixth sense, intuition, that Co-active® Coaches use fully.

There are three steps in using your intuition in coaching:

1. *Turning your intuition on* — learn to listen at Level 2 with your client, with your intuitive receiver tuned to their wavelength. Then listen at Level 3, with a soft focus antenna ready to pick up the intuitive messages, signals or nudges, that "something tugging at you".

2. *Paying attention* — notice that you have received an intuitive signal. Many people feel the intuition in their bodies. Sometimes it is literally a "gut" reaction. Some people feel intuition all over, or in a specific place in their body (chest, forehead). Some people don't feel intuition in their bodies at all — they simply have a sense. It is good practice to look for yourself to see where you experience intuition.

3. *Blurt!* — Intuition is of no benefit to the client unless coaches actually speak what their intuition gives them. The key to speaking from your intuition is to not be attached to your interpretation. In Co-active Coaching we assert that your intuition is never wrong…the nudge you receive is always worth paying attention to. It's the words we put around our intuition; our interpretation as coaches that is often off target.

Here are some questions to keep "on a shelf" in your brain to help you access your intuition.

>> *What is the client's tone of voice telling me?*

>> *What is the client's underlying mood?*

>> *What physical sensations am I having while the client is speaking?*

As you begin to play with these questions use them in your coaching interactions by prefacing your remarks with:

>> *I have a sense…*

>> *I have a hunch that…*

>> *Can I check something out with you?*

>> *I wonder if…*

Remember your interpretation of your intuition may be off. Allow your clients to course correct and dance with them where they are.

POWERFUL QUESTIONS

Asking questions of clients rather than giving advice is at the foundation of Co-active® Coaching.

Powerful Questions

1. Invite introspection.
2. Are open-ended — Begin with what or how, cannot be answered with yes or no.
3. Lead to greater creativity and insight.
4. Invite clients to look inside or to the future. Sample:

>> *What do you want?*
>> *What will that get you?*
>> *What are the possibilities?*
>> *Put yourself six months into the future. Standing there, what decisions would you make today?*

Inquiry

1. Often used as homework — the client thinks about the question all week.
2. Used for introspection and reflection.
3. No right answer — it is not a question to be resolved.
4. Integrates coaching into the clients life. Sample:

>> *What is it to be powerful?*
>> *Where am I too hard on myself?*
>> *Where do I sell out on myself?*

Request

1. Is based on the client's agenda.
2. Is clear, specific and direct.
3. Moves the client to take action.
4. Includes a specific action, conditions of satisfaction, and a date and time for completion.
5. Client can say yes, no, or make a counter offer. Sample:

>> *Will you walk a minimum of 30 minutes four times this week?*
>> *Will you call 10 people this week and ask them to become clients?*
>> *Will you take one day off from work this week to rejuvenate yourself?*

CLIENT SESSION (FORM)

Name: *Date:*

Follow-up from last session:

Notes:

Accountability:

Inquiry/Homework:

COACHING SESSION PREPARATION (FORM)

Name:

Session Date: *Next Session:*

What I have accomplished since our last session:

What I wanted to get done, but didn't:

Challenges/problems I am facing now:

Opportunities that are available to me right now:

I want to use my coach during the session to:

What I am committed to do by the next session:

Accountability

Accountability is having your clients account for what they said they were going to do. It stems from three questions:

1. What are you going to do?
2. By when will you do this?
3. How will I know?

Accountability does not include blame or judgment. Rather, the coach holds the client accountable to the client's vision or commitment and asks the client to account for the results of the intended action. If need be, holding the client accountable includes defining new actions to be taken.

Acknowledgment

Acknowledgment addresses the Self and who the client had to be in order to accomplish whatever action he or she took or awareness he or she achieved. It is the articulation of your deep knowing of the other.

> *"I acknowledge the courage it took for you to show up for this session, knowing that you had difficult things to share with me today."*

Agenda Comes From the Client

See "Hold the Client's Agenda."

Agenda: Big "A" Agenda

The Big "A" Agenda lives at the core of every human being and is exemplified by:

>> The desire to live life in alignment with what truly matters to one's most authentic self.

>> The desire to live a life of conscious choice.

>> The desire to be fully present to the experience of one's life, moment by moment.

Like the North Star, the Big "A" Agenda guides each of us in the direction that is most resonant and alive. Free from circumstances, fear or Saboteur conversations, the Big "A" Agenda calls each of us forth to the evolution of our most magnificent self.

While the Big "A" Agenda serves the client and belongs to the client, it is the coach who holds the Big "A" Agenda with and for the client in a coaching relationship. The resonance of connecting to the Big "A" is clearly felt by both coach and client and lives at the heart of the Co-active® Coaching relationship.

Agenda: little "a" agenda

Many things arise in a client's daily life: details, celebrations and challenges, logistics, relationships, Saboteur voices, other circumstances. Often these topics form the initial reasons a client comes to coaching. Co-active® Coaching defines these circumstances and day-to-day concerns as the client's little "a" agenda.

The little "a" agenda is a reflection of the client in the current circumstances of the client's life. Reflecting what is important to the client at the moment, the little "a" agenda also functions as an access point for the client's Big "A" Agenda, becoming a forum through which the Big "A" Agenda becomes manifest or expressed.

Articulate What's Going On

This skill involves telling the client what you see them doing; it may be what you're hearing with your Level 2 Listening, or you may speak what has not been said by the client based on your Level 3 Listening and awareness. Sometimes, it is powerful to simply repeat the client's words back to the client so they can really hear themselves.

> *"Debbie, I know how much you want to change your relationship with your dad, yet I hear you are interacting with him the way you always have."*
>
> *"You're annoyed that your manager didn't consider your workload when she assigned you to this new project."*
>
> *"We're really stuck here in this coaching session."*

Asking Permission

This skill enables the client to grant the coaching relationship access to unusually intimate or sometimes impolite areas of focus. For example, "May I tell you a hard truth?" "Is it all right to coach you on this issue?" "May I tell you what I see?"

Be With

To be with a client is both simple and profound. Being with a client is to be present and fully engaged with them, with no other goal than being with them in their experience. Being with a client is a powerful Level 3 connection, one that goes beyond thinking or understanding. By being with the client, the coach creates an inviting and spacious place for the client to be in the full experience of his or her life.

Bottom-lining

This is the skill of brevity and succinctness on the part of both the coach and the client. Bottom-lining is also about having the client get to the essence of his or her communication rather than engaging in long descriptive stories.

Brainstorming

With this skill, the coach and client together generate ideas, alternatives, and possible solutions. Some of the proposed ideas may be outrageous and impractical. This is merely a creative exercise to expand the possibilities available to the client. There is no attachment on the part of either coach or client to any of the ideas suggested.

Calibration

A structure to help the client locate their starting point, desired end point, and current status in their own growth and development process. Calibration also allows the client to measure their progress toward a dream or a goal.

Call Forth Magnificence

When calling forth the client's magnificence, the coach fiercely and courageously takes a stand for the client to step more boldly into his or her Big "A" Agenda. This occurs when the coach asks the client either to take a courageous, possibly scary step towards something the client wants in his or her life, or challenges the client to move beyond resistance or fear to face something fully. Four Attributes must be present for Calling Forth to happen:

1. *Authenticity*. The coach must come from a place of authenticity.
2. *Connection*. The coach and client must be very connected and safety is thus created for the coach to call the client forth.
3. *Aliveness*. There must be a feeling of aliveness on the part of the coach and in the relationship. Calling Forth cannot happen successfully in a neutral or dull atmosphere.
4. *Fierce Courage*. The coach must be courageous and be willing to take a big risk — including the possibility that the client may feel offended — for the sake of supporting the client to achieve his/her goals.

Challenge

Challenging involves requesting that a client stretch way beyond his or her selfimposed limits, AND SHAKES UP THE WAY THEY SEE THEMSELVES. Frequently, in the face of a challenge, clients will respond with a counter-offer that is greater than they initially would have allowed themselves to make otherwise.

A client WANTS a high level position that has just been posted in another department. He thinks he will be ready for it in about a year. You challenge him: "I challenge you to apply for this position now." The client counteroffers with "I will meet with my manager and ask her to recommend me to the department head."

Like a request, a challenge includes a specified action, conditions of satisfaction and a date or time by which it will be done. There are three possible responses to a challenge:

1. Yes,
2. No,
3. A counter-offer.

Championing

When you champion clients, you stand up for them when they doubt or question their abilities. Despite the client's self-doubt, the coach knows clearly who the client is and that he or she is capable of much more than the client thinks. CHAMPIONING IS OFTEN FUTURE FOCUSED. When the client is in the valley, the coach is on the next hill, waving a flag and saying, "Come on. You can make it."

Choice

Choice is the second step in the Balance coaching formula. Once a client has explored and discovered that there are many different perspectives with which to view a certain situation and they are not stuck in one "truth," the client may then choose which perspective will most serve them. Being at choice is critical, because when a client is at choice, s/he is no longer victimized by the circumstances facing him/her. Instead, one can powerfully choose how to view a situation. For example, a preliminary perspective on being fired from a job could be that the person fired is a failure. Upon viewing other perspectives, the client could determine that being fired presents opportunities to pursue his/her true passion. Being fully at choice in this perspective allows the client to confidently begin to explore new opportunities.

Clarifying

When a client is unable to articulate clearly what he or she wants or where he or she is going, the coach clarifies the client's experience. Clarification may be used in response to the client's vague sense of what it is that he or she wants, confusion, or uncertainty. This skill represents a synergistic application of questioning, reframing, and articulating what is going on. It is particularly useful during the discovery process.

Clearing

Clearing is a skill that is a benefit to both the client and the coach. When the client is preoccupied with a situation or a mental state that interferes with his or her ability to be present or take action, the coach assists the client by being an active listener while the client vents or complains. Both client and coach hold the intention of clearing the emotionality from the situation. This active listening allows the client to temporarily clear the situation out of the way and focus on taking the next step. When a coach gets hooked by a client interaction or is preoccupied with issues that do not pertain to the client, the coach can clear. The coach clears by sharing his or her experience or preoccupation with a colleague or a friend in order to show up and fully be present with the client.

Client

1. A person who engages the professional advice or services of another (a lawyer's *clients*).

2. A customer, or someone who receives services.

Client is Naturally Creative, Resourceful, Whole

One of the cornerstones of Co-active® Coaching. The client is naturally creative, resourceful, and whole.

>> Nothing is broken or needs fixing.

>> The coach has the questions, the client has the answers.

Client's Whole Life

A cornerstone of the Co-active® Coaching model. Everything that a client experiences or chooses in their daily life contributes to their level of fulfillment, the degree of balance in their lives and the effectiveness of their process.

Co-active® Coaching

A powerful alliance designed to forward and enhance the lifelong process of human learning, effectiveness and fulfillment.

Commitment

There is a fundamental difference between goals and commitments. The goal is the outward, visible outcome; the commitment is the inner drive that produced the goal to begin with. Asking a client "What are you committed to?" causes the client to look deeper inside than asking "What is your goal?" In some cases, understanding the commitment is necessary before goals can be set. In some cases, clarifying the commitment changes the goals.

Curiosity

In Co-active® Coaching we start with the belief that clients are creative and resourceful, and they have the answers. That means that the coach's job is to be curious and ask questions. The questions coaches ask are provocative, open-ended, inviting. The questions invite clients to look in a certain direction but the invitation has no preconceived conclusion. These are not leading questions. And coaches are not at all attached to the answers they receive. If it is not a fruitful place to look, clients will know and say so, or the coach will see that it was a dead-end tunnel, and ask a different question. Curiosity is a playful state, full of wonder. As in, "I wonder what you want?" "I wonder what your life would be like if you could design it to be any way you like?" "I wonder what you are deeply committed to?" "I wonder what's holding you back?" The spaciousness of curiosity is miles wide and open for exploration. Coach and client enter this space together to look around. Curious is somehow less dangerous. Curiosity tends to lower the risk and eliminate the stifling quality of potential judgment. It is no big deal to look in a curious way. We're just being curious. And yet, curiosity is enormously powerful because it is so open to the client being surprised and finding the unexpected truth. It is child-like: look what I found! And it is exciting to look in a curious way.

Dance in the Moment

Dancing in the moment means being completely present with your client, holding your client's agenda, accessing your intuition, letting your client lead you. When you dance in the moment you are open to whatever steps your client takes and are willing to go in the client's direction and flow.

Designed Alliance

The design of the alliance begins during the first meeting or discovery session. Each coaching relationship is custom-designed to meet the particular needs of the individuals involved. Both client and coach are intimately involved in designing the coaching relationship that will be most beneficial to the client. Designed alliances tend to shift over time and need to be revisited regularly.

Down the Tube

It is sometimes challenging to fully experience areas of our lives that are uncomfortable. It is easier to shut them out, to turn away from those things we can't be with. Unfortunately, by cutting these things out of our experience, we also sacrifice our aliveness. It takes so much of our energy to keep the cover on what we can't be with, that instead of going away, those things we're trying to avoid actually run our lives. Coaching Down the Tube means taking the client where they are, especially when they are confronted by something they can't be with. Often emotion is involved, and by experiencing the emotion, clients are freed up to move on in their lives, including a new part of themselves in the process.

Enrollment

Enrollment is both a life skill and a coaching skill. Authentically engaging with people and generating excitement, enthusiasm and aliveness is part of communicating effectively whether you are talking to your children, a client, an employee or your manager. Coaches enroll their clients into the possibilities of the client's biggest, most magnificent self, and also into different aspects of coaching. For example, throughout the life of the coaching relationship, the coach may enroll the client into trying on different perspectives, going up or down the tube, accepting a challenge, and/or choosing to set the Saboteur aside. All of these are areas where enrolling the client to participate fully will empower the coaching.

Forward Action & Deepen Learning

This context utilizes all other coaching skills, with an added emphasis on moving the client forward. It may be through use of a request or powerful question. It may be through bottom-lining so that something gets done during the session. Forwarding the action may occur through bringing the client back to the focus of their goal, or through reframing something in such a way that the client is free to take action. Acknowledging a client can also forward action. The most powerful forwarding the action occurs when a coach has the client DO IT NOW during the coaching session. This provides immediate support and immediate celebration once the action is taken.

Clients soon discover that there is a second aspect to the coaching relationship and it is the complement to action: they learn from the action they take. They also learn from the action they don't take, by the way. In effect, this becomes the means for deeper learning, which is the reason we call this paired aspect, Deepening the Learning.

Geography

The relationship between coach and client exists in space and time. Whether coaching is done in person or over the telephone, an environment is created in which the coaching occurs. The feeling, posture, and climate…this environment has many qualities that we call the Geography. Often the concept of geography can be confused solely with the position of one's body without considering the position of one's body in space, in the environment. Exploring emotions, body positioning, voice tone and pace can allow for deeper insight and understanding for the client. As coach and client, we actually create geography even when we are unconscious of what we create. Being conscious of geography makes coaching enormously more effective. The goal is to be aware of the geography you are creating as coach to notice what happens when you or your client changes geography.

The body is an excellent indicator of one's geography. If the client is, for example, in a state of confusion, the coach may ask the client to change their body posture, their location in the room, or simply get them to move their body. The coach will then help the client to realize that, by changing their body position, their mood may shift, their thinking may clear, a new perspective may occur, and the client's energy may shift. This is, in fact, a change in the client's geography.

Goal Setting

Clients live into their Big "A" Agendas by setting goals and following through. Goals keep clients focused and on track toward who they are becoming. Goals are not the same as action; they are the desired result of action.

There are many versions of the acronym "SMART" as applied to goals. Here is the CTI version:

S = Specific

M = Measurable

A = Accountable

R = Resonant

T = Thrilling

Grant Relationship Power

The coaching relationship is separate from the client and the coach. The power of coaching resides in the relationship between coach and client, rather than with either the coach or the client. By granting power to the relationship, both coach and client are taking responsibility for creating the coaching relationship that will most fully serve the client.

Hold the Client's Agenda

Holding the client's agenda is both a philosophical stance and a cornerstone of the Co-active® Coaching model. When a coach holds the client's agenda, the coach lets go of their own opinions, judgments and answers in support of facilitating the client's Fulfillment, Balance and Process. The coach follows the client's lead without knowing the RIGHT answer, without giving solutions or telling the client what to do. Holding the client's agenda requires the coach to put their whole attention on the client and the client's agenda, not the coach's agenda for the client.

Holding the Focus

Once the client has determined a direction or course of action, the coach's job is to keep the client on track and true to that course. Frequently, clients become distracted by events in their lives, strong feelings elicited by the Saboteur, or the wealth of other possibilities available. The coach consistently reminds the client of his or her focus and helps redirect his or her energy back to the client's desired outcomes and life choices.

Identify the Topic

1. Balance coaching begins with a clear topic that matters to the client. It is important to identify the topic itself, without embedded perspectives. If the client begins the coaching with a statement such as "I am stuck about my relationship with my customer," then the topic is "relationship with my customer," and the first perspective is "stuck." If you begin the balance work with "stuck" embedded in the topic, then you will soon bog down in the coaching. Always distinguish and separate the embedded perspectives from the topic.

2. In Fulfillment or Process coaching sessions, this may look like getting clear with the client about their agenda for the coaching session.

Inquiry

When a powerful question is given as homework to the client, it is intended to deepen the client's learning and provoke further reflection. The intention is for the client to consider the inquiry between sessions or over a longer period of time, and to see what occurs for them. The inquiry is usually based upon a particular situation that the client is currently addressing. An inquiry has multiple answers, no one or two of which are "right."

"What are you tolerating?"

"What is it to be undaunted?"

"What is challenge?"

Integration

You will see and experience that an issue can be coached from each of the principles — Fulfillment, Balance, and Process — and the client will gain value. Each principle will take the client to a different place and all three will work. Sometimes, there are client topics that just naturally lend themselves to a particular principle. Some coaching interactions will stay in one principle the entire time, others will shift between principles. There isn't a "right" way. You must simply choose and be looking for the client's reaction. Integration is the ability to choose a starting place and know that you can change course if needed, using everything you know about Co-active® Coaching.

Intrude

On occasion, the coach may need to intrude, to interrupt or wake up a client who is going on and on, or who is kidding himself or herself. When you intrude, it is for the sake of the client's agenda, often pointing the client in a specific direction, "Stop a moment. What's at the heart of this?" Intrusion is considered rude in some cultures. The Coaches Training Institute views intrusion as being direct with the client, allowing the client to honestly assess and immediately deal with situations. Sometimes the intrusion is a hard truth such as "You are kidding yourself." Sometimes the intrusion is simply stating what is going on, such as "You are skirting the issue."

Intuition

Intuiting is the process of accessing and trusting one's inner knowing. Intuition is direct knowing, unencumbered by our thinking mind. The process of intuiting is non-linear and non-rational. Sometimes, the information received through intuiting does not make rational sense to the coach. However, this information is usually quite valuable to the client. Intuiting involves taking risks and trusting your gut. The coach remains unattached to the accuracy of their intuition.

"I have a hunch that…"

"I wonder if…"

Listening

The coach listens for the client's vision, values, commitment and purpose in their words and demeanor. To listen for is to listen in search of something. The coach listens with a consciousness, with a purpose and focus that comes from the alliance that was designed with the client. The coach is listening for the client's agenda, not the coach's agenda for the client. The Coaches Training Institute calls listening to your own thoughts, judgments and opinions about the client's story Level 1, while listening with a hard focus on the client is Level 2 and global listening is Level 3.

Everything in coaching hinges on listening — especially listening with the client's agenda in mind. The coach is listening for signs of life, the choices clients are making, and how those choices move them toward balance or away. Listening is the gate through which all coaching passes.

There are two aspects of listening in coaching:

1. *Attention* — awareness of what we receive through our senses (hearing, seeing and intuition). We are attentive to all the information we are receiving. We notice the breathing on the phone, the pace of delivery, the modulation of the voice. We sense the pressure behind the words — the voice may be soft- or hard-edged, tentative or enraged.

2. *Impact* — what we do with our listening. What impact is the coach having on the client? How the coach listens and what they do with that listening impacts the client.

There are three levels of listening:

Level 1: Internal Listening

>> Attention is on ourselves — on the sound of our own inner voice.

>> Listening to our own thoughts, opinions, judgments, feelings andconclusions.

>> Appropriate level for the client's listening.

>> When the coach is in Level 1, they are unaware of the client and unaware of their impact on the client.

Level 2: Focused Listening

>> Attention is a sharp focus on the other person — listening is directed at the client.

>> Listening for words, expression, emotion, what they don't say, values, vision, and what makes them energetic.

>> Impact on the client — are they coming alive (resonance) or are they becoming withdrawn (dissonance)?

Level 3: Global Listening

>> Attention is soft focus; listening at 360 degrees.

>> Awareness includes everything: What you see, hear, smell, and feel.

>> Gives greater access to your intuition.

>> Coach is aware of their impact on the client and can dance with it.

Making Distinctions

One way to help clients see a situation from a fresh perspective is to help them distinguish between two or more concepts, facts or ideas. In this case, two facts have been blended together into one disempowering belief. The belief appears to be a fact of life and it is not.

The separate facts need to be distinguished in order for the client to become more resourceful. Examples of where it is useful to make distinctions are:

>> Failing & failure ("Since I failed, I am a failure.")

>> Money & success ("If I make money that means I'm successful.")

Metaphor

Metaphors are used to illustrate a point and paint a verbal picture for the client.

"Your mind is like a ping pong ball bouncing between one choice and another."

"You're almost at the finish line. Go for it! You can win the race!"

Meta-view

Meta-view is the big picture or perspective. The coach pulls back (or asks the client to pull back) from the client's immediate issues and from the clarity of that expanded perspective reflects back to the client what they see.

"If your life were like a road, and we were to take a helicopter ride up above it, what would we see?"

Perspectives

Perspective is one of the gifts that the coach brings to the coaching relationship — not the "right" perspective, simply other points of view. Creating perspective expands the aperture through which clients look at their life circumstances. Part of coaching is inviting clients to see their life or certain issues from different angles. When they see things from only one perspective, the old way of looking, they are less resourceful and victimized by the circumstances. When they are able to reexamine their viewpoint, they are able to see possibility and change.

Planning

The coach helps the client articulate the direction that they wish to go and actively monitors the progress made by the client. Clients can frequently benefit from support in planning and time management as coaches help them develop their skills in these areas.

Powerful Questions

A powerful question evokes clarity, action, discovery, insight or commitment. It creates greater possibility, new learning or clearer vision. Powerful questions are open-ended questions that do not elicit a yes or no response. Powerful questions are derived from holding the client's agenda and either forward the client's action or deepen their learning.

"What do you want?"

"What's next?"

"How will you start?"

"What does that cost you?"

"What's important for you to remember?"

Reframing

Reframing involves providing a client with another perspective. When a coach reframes a situation, he or she takes the original data and interprets them in a different way. For example, a client has just been informed that she was selected as second choice for a high-powered position in a very competitive market. She is disappointed and is questioning her professional competence. A reframe of the situation is: To be selected as second choice in such a competitive market indicates the high quality of your expertise and experience.

Request

One of the most potent coaching skills is that of making a request of the client. The request, based upon the client's agenda, is designed to forward the client's action. The request includes a specified action, conditions of satisfaction and a date or time by which it will be done. There are three possible responses to a request:

1. Yes,
2. No,
3. A counter-offer.

Resonance/Dissonance

When resonance is present, the client is honoring his or her values, the coach can sense the client's true self, there is a feeling of aliveness coming from the client. Dissonance signals the presence of the Saboteur.

Saboteur

The Saboteur is a concept that embodies a group of thought processes and feelings that maintains the status quo in our lives. Often operating as a structure that would seem to protect us, it in fact keeps us from moving forward and getting what we truly want in life. Like our minds, the Saboteur will always be with us. It is neither good nor bad; it just is. The Saboteur loses its power over us when we can identify it for what it is, notice our options in the situation and then consciously choose what it is we do really want at that time.

Self-Management

The ability of the coach to get out of the way in the service of holding the client's agenda. This means to put aside all opinions, preferences, judgments and beliefs in order to reflect and support the client's agenda. Another facet of self-management includes managing the client's Saboteur. The coach can aid the client in identifying the Saboteur and then providing tools that the client can use in managing their Saboteur. Clearing is also a tool for coach or client self-management.

Structures

Structures are devices that remind clients of their vision, goals, purpose, or actions that they need to take immediately. Some examples of structures are collages, calendars, messages on voice mail, alarm clocks, and so on.

Take Charge

The coach chooses and directs the path of the coaching in service of the client's agenda. Sometimes clients lose their way in their circumstances, and forget what matters most to them. That's when the coach needs to take charge and direct the coaching back to what is most meaningful to the client.

Take Them Where They Are

When a coach takes a client where they are, the coach is being with the client in the moment, actively getting the client more in touch with their experience. Taking the client where they are means actively helping the client to explore and discover their emotional and physical experience, their full and magnificent self. The emphasis here is on the coach's active role in having the client experience fully whatever they are experiencing. The coach takes charge in bringing the client more fully into their experience.

Up the Tube

Often, coaching clients are as reluctant to fully experience the full joy and celebration of their lives, as they are to explore their darker feelings and experiences. Taking the client Up the Tube is the act of having the client tap into their full magnificent self. As they move Up the Tube, they reach a point where they are drawn by the effortlessness and glory of the jet stream — that emotionally satisfying place where they feel their magnificence and life feels easy and effortless.

Values

Values represent who you are right now. They are principles that you hold to be of worth in your life. People often confuse values with morals. Values are not chosen. They are intrinsic to you. Your individual values are as distinctly yours as your thumbprint.

Vision/Visioning

This is a multi-faceted mental image, which personally defines and inspires the client to take action and create that picture in their actual life. A powerful vision is sensuous, exciting and magnetic; constantly attracting the client's desire to bring the image to fruition. Vision provides the client with a direction and can provide meaning in the client's life.

Witnessing

Being authentically present with the client. Witnessing creates the space for the client to fully express him or herself. When the coach witnesses the client's learning and growth, the client feels seen and known at a very deep level.

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