

### 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 self-imposed 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 and conclusions.
- 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.