

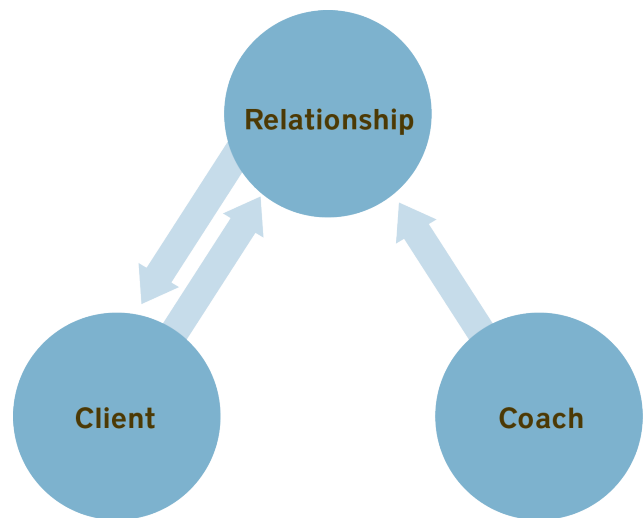
READING #01: EMPOWERED RELATIONSHIPS

The coaching relationship is more powerful than either the coach or the client. It is a space that challenges, incites, motivates, encourages and sometimes demands that the client be powerful. The relationship is separate from the client and the coach as illustrated in the graphic below:

As you can see, the relationship is like a triangle, with the coach at one point, the client at another point and the relationship at the third and final point. The coach grants the relationship power, and the focus of the relationship is the client. The client grants the relationship power and is empowered by the relationship.

There are three main steps in creating the coaching relationship:

1. Creating a safe and courageous space.
2. Designing the alliance.
3. Evoking transformation.



Step One: Creating a Safe and Courageous Space

The first step is to create a safe and courageous space or container for the client to begin to approach their life with curiosity, interest, power, creativity and choice.

What creates a safe and courageous space?

- Trust.
- Non-attachment or spaciousness.
- Finding the client right and holding them as naturally creative, resourceful and whole.
- The coach holding themselves as naturally creative, resourceful and whole.
- Being straightforward and honest with the client.
- Being authentic and real.
- Establishing rapport and loving the client. Celebrating who they are.
- The coach being willing to challenge the client and ask the hard questions.

Creating trust is very much a “being” thing and each of us creates trust in our own unique way. “Doing” trust is almost certain to create the opposite effect. Nothing makes us more nervous than someone who continually assures us that they can be trusted.

Non-attachment has the client know that they fully at choice and will not find themselves trapped by someone else’s agenda for them.

Your willingness to trust clients to create their own solutions, and your certainty that they are capable, resourceful and whole lets them know that you are on their side and committed to their solutions. It is very empowering to be with someone who accepts and loves you just the way you are while at the same time holding a bigger vision for you than you might be holding for yourself. It is rare that other people in our lives hold a bigger vision for us than we hold for ourselves.

Lastly, if the coach is willing to challenge the client, ask the hard questions and tell the hard truth, without attachment, then the client knows they can trust the coach to go the distance – to stay connected and committed to the client through the client’s process. They know that the coach is fully committed to them and will put their full authentic self into the relationship to support the client to have a rich and fulfilling life.

Step Two: Designing the Alliance

Step two in creating the coaching relationship includes the following components:

1. Consciously designing the coaching relationship. This is an opportunity for both coach and client to say what they need and want in this coaching relationship.
2. Agreements.
3. Designing the coach.
4. Designing or training the client.

Designing the Alliance is a critical aspect of the Discovery Session or initial meeting with a client and the design of the alliance is on-going. It is important for the coach to dance in each moment and be ready and willing to redesign the alliance as needed.

Step Three: Evoke Transformation

Finally, the third step in creating the coaching relationship, is to evoke transformation as well as hold the client’s goals and desired focus of the coaching. In Step Two you have begun to identify the potential arenas where transformation is may occur. Often your clients will come to the coaching session with something immediate that they want to work on. While it is useful to train your clients to come to the coaching session with a prepared agenda, it’s important to understand the difference between the agenda of the moment and the transformation of the person! It’s easy to get trapped in the “problem” or the agenda of the moment and lose sight of what is really possible. In any event or incident in the client’s life there is always something for them to learn that relates to their transformation.

It is as if the coaching occurs on different levels at the same time. One level is the client’s current situation or circumstances, and the other level is who the client is becoming, what is possible for him or her and the flow of his or her life. While the first topic is valuable and useful and forwards the action, it is the second – who the client is becoming – that provides the real gold of the coaching relationship. With a specific topic or issue, the client may resolve a situation or interact powerfully with the circumstances of his or her life. When we look through the lens of transformation, the client learns how the circumstances of his or her life illuminate who he or she is and how they specifically and uniquely creates his or her life.

These tools of designing an alliance, creating safe and courageous space, and evoking transformation are incredibly effective in creating an empowered coaching relationship. From this perspective, let's consider what is needed to empower your relationships throughout the Certification Program.

- What will create trust for you?
- What are the areas you absolutely want to design into your relationships in this Certification Program?

There are a number of suggestions and recommendations in the next section to get you started.

- What else do you want to design?
- What is the transformation to be evoked in you as you embark on this learning journey?


Recommended Pod Call Agreements

As you begin your Certification Program with your first Pod Call, it is critical to design the alliance between Pod Call members, much like a coach designs the alliance with their clients.

- What do you want from this Pod Call experience?
- What do you need to put in place in order to get what you want?
- What do you have to offer to the Pod?
- Who do you need to be to get the most value from the Certification Program?
- What are you committed to?

The following list contains suggestions for Pod Call agreements. Feel free, as a group, to incorporate as many suggestions as you like, and/or to create your own agreements.

1. Confidentiality. All participants hold everything that is said on the call confidential. All recordings, CPCC Manual and the contents of the Certification Community are the intellectual property of CTI. These resources are for the exclusive use of the Certification students and may not be distributed in any way or form without the express written consent of CTI.
2. Recording. You also agree that Pod and Triad Calls may be recorded for either training purposes or for use of other Pod members.
3. Professionalism. Being a professional coach starts in the training process. Come to the call prepared and on time.
4. Tell the truth. The purpose of the Pod Call is to support each other in building a coaching practice and you will be evaluating each other as coaches. Your learning will be served by agreeing to tell the truth. We also recommend each participant commit to telling the truth and that as a Pod you grant each other permission to do so.
5. Maintain Listening at Level 2 and 3. The Pod Call is a place to hone your coaching skills. It is important that everyone on the call access themselves as coaches. Listen for: What is the client's (fellow Pod member's) agenda? What agenda is being held? What can you do to deepen the learning for the Pod? What impact are you having? What's the metaview of the group process?

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6. Respect each member's unique style and process.
 7. Stay committed to the learning rather than the problems.
 8. Be willing to get rigorous with each other's learning.
 9. Nobody gets to be wrong.
 10. Agree to notify the Certification Program Leader (CPL) if you will NOT be on the call.
 11. Agree that when challenges occur, you will use the Co-Active® Model to address the concerns and resolve the situation.
 12. What else do you want to put in place?

Assumptions and Promises

Assumptions

1. We assume that you are committed to the profession of coaching.
2. We assume that you are in this Certification Program because you want to be the best Co-Active® Coach you can be.
3. We assume that you are hungry and passionate to learn.
4. We assume that you are willing to be responsible for your own learning.
5. We assume that you will embrace and empower your own learning process and the learning of your Podmates throughout the Program.
6. We assume that you are eager for feedback from your Certification Program Leader, your Podmates, and your supervisors, and that you will use your feedback as a tool for learning more.
7. We assume that you will embrace each homework assignment as an opportunity to deepen your learning.
8. We assume that you will empower the relationship...whether the relationship is with your Podmates, your Certification Program Leader your supervisors, your coach, your clients, or yourself.
9. We assume that when you are struggling, you will use the Co-Active® Model to help you recover; that you will be curious when challenges arise, that you will manage your Saboteur, and that you will listen from Level 2 and Level 3 when you are not being a client on the calls.
10. We assume that you will trust that all that you need is in the Model.



Promises

As your Certification Program Leader:

1. I promise to use everything that happens in this Program as an opportunity for you to learn more about coaching.
2. I promise to use feedback to awaken and evoke the masterful Co-Active® Coach in you.
3. I promise to keep modeling Co-Active® Coaching in our interactions.
4. I promise to design and redesign our alliance as needed.
5. I promise to model celebrating failure, mine and yours.
6. I promise to view you as naturally creative, resourceful and whole, and to view your journey in Certification through that lens.
7. As a result of your full-out participation in this Program, I promise that you will have a solid grounding in the mechanics and art of Co-Active® Coaching, a wider range of expression as a coach, the flexibility to use your Co-Active® Coaching tools and skills in new ways, the strength to give and receive challenging feedback.

READING #02: THE CORNERSTONES

The four Cornerstones offer a strong foundation. We interact with our clients based on the assumption that the client wants more: more aliveness, more Fulfillment, more Balance, to be more fully in their life. It is important that we stay committed to this as time goes on; that we stay resourceful, creative and unattached, continuing to be willing to operate outside our comfort zone and risk upsetting the status quo of the coaching by telling the hard truth or intruding.

People are Naturally Creative, Resourceful and Whole


This means everyone. All people. Now there are times when people do not have full access to their own natural creativity, resourcefulness, or wholeness, and at their core, they continue to be naturally creative resourceful and whole. It's our job as coaches to interact with our clients as the fully alive, naturally creative resourceful and whole human being that they are.

Often, coaches are clear in the belief that their clients are naturally creative, resourceful and whole; yet in the coaching, they're not holding their clients that way. This can be quite subtle: for example, working to solve a client's problem, asking leading questions to help your client see the solution you envision to their situation, offering suggestions to fix a challenge confronting your client, or doing your best to help your client feel better about something that has hurt them. All of these interactions actually are ways of holding your client as less than completely naturally creative, resourceful and whole. It is the coach's role to fiercely hold the client as naturally creative resourceful and whole, even when the client is scared or unable or unwilling to see themselves in this way. Truly holding the client naturally creative, resourceful and whole can be paradoxical at times...the coach lets go of problem-solving or being 'nice' in favor of telling the hard truth or witnessing a client who is in pain. All of this is in service of the client continuing to develop into their most magnificent self.

In order to do this, we as coaches need to hold ourselves as naturally creative, resourceful and whole. In our on-going relationship with our clients, it's important that we remain curious, resourceful and committed to our clients' aliveness. We must be willing to coach outside OUR comfort zone and be willing to "do" or "be" whatever it takes to forward the action or deepen the learning for our client. While this may appear obvious at first glance, it is very challenging to keep this level of rigor in our coaching over time. We can become complacent, discouraged, or disillusioned. We don't want to make waves or rock the boat with our clients. We don't want to risk offending our clients, or being disliked, in short the very same things that keep our clients from playing full out in their lives.

Dance in This Moment

Dancing in this moment is about the coach's agility and the coach being completely present. Present to notice what is going on in each moment, agile, flexible, nimble to move as needed. It is about the paradox of surrendering while holding authority. About following what is happening, yet responding to what is needed in this moment. Always staying committed to transformation. Dancing in this moment calls the coach into deep connection with Level 3 Listening, continuing to discover what is present, what is needed, what is called for in each moment. When we are dancing in this moment, we are on a journey, with no specific destination, only the intention of transformation. Dancing in this moment is all about the



journey and creating from whatever is present, whatever is coming. It's about developing the ability to respond, rather than react. About expanding consciousness and evolving as human beings.

Focus on the Whole Person

This Cornerstone is about the whole person, the human being, rather than the roles or circumstances that we often use to describe ourselves. When we coach the whole person, we include all aspects: emotions, mind, body and spirit. Focusing on the whole person helps to distinguish the person from their circumstances and allows the coaching to create a bigger picture of what is possible as the person's whole experience is included in the coaching.

As a coach, it's easy to get pulled into the circumstances of what the client wants. Focus on the Whole Person keeps our attention on the human being, not the circumstances, and also requires us to trust that when our attention is on the human being, the circumstances of their life do change.

Evoke Transformation

Everything that a Co-Active® Coach is and does is consciously geared to the client's transformation. The Cornerstone of Evoke Transformation points the coaching away from Saboteur conversations and limiting self-talk, and calls the coach's attention to the authentic and magnificent human being that is the client. By holding the Cornerstone of evoking transformation, the coach creates a space for the client where resonance and creativity can flourish.

By coaching the client from the stance of the four Cornerstones, the coach insists that the client be present with the part of themselves that is growing, striving, learning, and reaching for what's next. The paradox here is that there is no place to reach — this is a lifelong journey, a lifelong process of discovery, learning and love.

READING #03: INTEGRATION OF THE PRINCIPLE OF FULFILLMENT

What is Fulfillment? The answer to this question is individually unique and intensely personal.

What is infinite tedium to you may be hugely fulfilling to one of your clients.

Make no mistake about it. Fulfillment is our birthright, yet choosing to live one's life based on a model of fulfillment, on personal values and preferences is a radical act. We have been taught from an early age to be successful, practical, pragmatic and accomplished. We have learned to follow the thinking of our heads rather than our hearts' desires. We have been relentlessly trained to operate inside the box of what we know we can achieve, rather than risking the uncharted territory of what we truly want. Pursuing a path of fulfillment means rocking the boat, sometimes rocking it very hard. To go against and outside of this training requires a fierce creativity, an undauntability and steadfastness that is paradoxically both rare and smoldering in the heart of every human.

Coaching clients in fulfillment is about having them stretch beyond their limits and what they know to go for what their hearts desire... for what will have them sing rather than just speak, what will have them dance rather than merely walk. It is about empowering clients to dream big, fanning the flames of those dreams with the skills of acknowledgment, championing and powerful questions and then challenging them to go for those dreams with aliveness, passion and commitment.


For coaches, it is vitally important to realize that the true juice of fulfillment is not in the destination. The act of discovering and going for what you truly want is, in and of itself, fulfilling. When a client is engaged in moving toward fulfillment, the result or outcome is a sweet and passing experience. It is the day-to-day aliveness that this type of journey engenders that brings on-going, lasting fulfillment. To be playing a "big game," to be working toward things that truly matter to oneself, to be living, thinking and creating "outside the box;" this is the foundation of fulfillment.

Fulfillment is one of the most enrolling aspects of coaching. Enroll potential clients in their dreams and watch them jump into coaching. Give them permission to make choices based on their own values (as opposed to parents' or society's) and see them come alive.

Choosing to live our lives based on our values is not what society, parents, etc. have taught us. While honoring our values brings us aliveness and fulfillment, it is definitely not the easy, well-trodden way. Fully honoring our values is about resonance, not about being happy all the time.

Many people make choices based on what others want, or what will be easiest, or what will cause us the least amount of discomfort in the moment. We have been taught to live inside a box of what we think we can have and what we already know. We settle for what we have and give up on our dreams. The trend or movement in this direction is so overwhelming that, without some kind of structure for support, we get swept away. It becomes almost impossible for us to fight the tide and hold onto our vision alone. We forget what it is that we truly want, what brings us joy and fulfillment. We forget that we know.

Values clarification begins a process of rediscovery. As a client's values become more clear, they can see the choices that they need to make in order to have a more fulfilling life. Within the structure of coaching, clients begin to create and design their lives from what they want, from the possibility that exists outside the box of what they think they can have.



Values are the lighted signposts on the fulfillment path, the arrows that tell a client which journey will hold the most fulfillment. In honoring one's values, there is an inherent permission to be fully integrated and self-expressed; to be, in fact, whole. Coaches can return to a client's values again and again; there is always grist here for the coaching mill. If things are going well for the client, take a look at how they are doing in honoring their values. This will usually add richness and "body" to the moment. If the client is suffering or feeling empty, search for the values that are being stepped on or suppressed. Score these values on a scale of 1 to 10, 1 meaning they are completely dishonoring the value and 10 meaning they are honoring the value fully. Challenge your client to raise the score with immediate and courageous action. Watch for the Saboteur, but speak to and challenge your client's heart.

While values are a compass for a client's rich, fulfilling life, goals design the path that a client follows toward who they are becoming. A client lives into their full, magnificent self 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. Every goal is an opportunity for a client to live more fully into their Life Purpose.

When a Co-Active® Coach holds the client accountable for moving toward their goals, they are holding the client accountable for much more than a specific action toward a goal, they are holding the client accountable for living into their Life Purpose. Resonant goals are tied to fully honoring the client's values, who they are becoming and what they truly want. Resonant goals move clients toward transformative change. It's part of our job as coaches to help clients find the resonance in their goals – or let them go.

A thrilling goal is compelling and exciting to a client. Co-Active® Coaches help the client to set goals that are so thrilling – and even scary – that the client can't wait to get started! Encourage your clients to set goals that have them stretch, that call them forth to new capabilities and power, that push and pull them forward into a bigger life.

The Captain and Crew are invaluable tools in coaching clients toward the state of fulfillment. The Captain is like a client's true self and has "been there" and "done that" enough to have a great deal of clarity about such matters as fulfillment. Most Captains are not particularly interested in pleasing others, tolerating or settling.

Coaching your client to develop an on-going relationship with their Captain and Crew can often open up powerful and "out of the box" coaching.

Work with your clients in creating an exciting, resonant path for their actions. What would be so juicy that it would pull them out of bed in the morning like a magnet? Assist your clients in creating visual reminders, cues, quotes, structures, images, phrases; whatever resonates for them and will keep things alive for them. Let them know that as their coach, you know who they are and what they are about. Even when they are mired deep in the swamp of Saboteur, the vision of your client's true self lives as you hold it for them like a beacon on a starless night.

Coaching is about change, about clients moving out of their comfort zones and going for what they truly want instead of what they think they can have. As keeper of the status quo, the Saboteur gets up in arms about all this change and fulfillment stuff. "Who are you," says the Saboteur, "to upset the status quo, to say that you want more, better or different? How dare you!"

The Saboteur, as defined in the dictionary, is one *who bungles and sabotages*. What is sabotage? Well, according to Merriam-Webster's online and American Heritage Dictionary of the English Language online, sabotage is:

1. Destruction of property or obstruction of normal operations.
2. Treacherous action to defeat or hinder a cause or an endeavor; deliberate subversion.
3. An act or process tending to hamper or hurt.

So, the client's Saboteur is not to be taken lightly. The presence of the Saboteur puts the client into a state of dissonance, where negative self-talk and self-defeating thinking rule the day. The Saboteur is the antithesis of resonance, and separates the client from their true self.

There are many different ways to coach the client when the Saboteur shows up. It's important that a coach be facile with a variety of ways to coach around the Saboteur voices or move them aside because different approaches are effective with different clients, or even with the same client at different times. Trust your intuition and allow yourself to experiment. If one approach isn't working, then try another. See page 3 in *Chapter 5: References: Eight Ways to Move Aside Saboteur Voices*


In our experience, ways to coach around the Saboteur fall into two basic categories. The first category is about naming the dissonance and creating awareness that the Saboteur is present or by personifying the Saboteur. Have your clients name their Saboteurs, draw them and describe them. Or have them create a Saboteur doll or other structure that represents it to them. Have them find a place for the Saboteur to live either in reality or in their imagination. Then, as a coach, send the Saboteur there when they are getting in the way of the coaching. One client of ours, whose Saboteur's name was Ex-lax, had a little troll that represented her Saboteur to her. When he got in the way of what she wanted to accomplish, she would put Ex-lax in a drawer and leave him there until she was done with her project.

You can also do this during the coaching session. If the Saboteur is being very active in the coaching, you can send it into the hallway, to its cave, or simply ask the client to choose to focus their attention elsewhere. Then proceed with the coaching.

You'll be most effective in your coaching when you take the Saboteur seriously, yet handle it lightly, playfully and creatively when it shows up. The Saboteur is here to stay, and as a coach you need to be able to dance with the Saboteur without getting sucked into believing it.

The second category for coaching around the Saboteur blows right past it and builds resonance, by working with the client's Captain, values, vision or life purpose. The coach notices, yet basically by-passes the Saboteur and goes right to the client's true self. These techniques call the power of the client forth and, clever as a Saboteur is, it is no match for the power of a client's true self. Ask a powerful question like "What do you really want" and watch the Saboteur fade into the background. Work with the client's Captain or the client's values. Acknowledge your client or champion who they are. Make an outrageous request or challenge them in a big way. Expand their perspectives. Have them see beyond the limited thinking or story that they have been telling themselves about what is available to them.

How do you know when you are coaching the Saboteur? Some topics are obvious, like I don't have enough time, money, etc. to honor my values. Listen for Saboteur dissonant language like "I can't," "I have to", or "I shouldn't." Listen for the story that clients are telling themselves



about why they have to struggle, suffer, and sacrifice. Watch for the feeling in yourself as the coach of struggling or going around in circles like a plane in a holding pattern above an airport. Most importantly, watch for “the way it is.” Notice if your client is working from “inside the box,” trying to rearrange the pieces of what they already know or think they can have. Coach your clients to look outside the box, and create from what they truly want, from what will bring them joy, fulfillment and aliveness.

As long as you are coaching the client’s brilliance and power rather than the limitations, the resonance of the client’s life will expand and they will have an experience of Fulfillment.

READING #04: INTEGRATION OF THE PRINCIPLE OF BALANCE

Balance is about action from the heart: moving forward from what is most resonant or most meaningful to the client. Working with perspectives with our clients helps them to identify the path or the course that's most resonant for them. Balance is about slowing ourselves down to make a conscious choice. To do that, we first expand the range of options available so that people can find the one that's most resonant instead of thinking this is just the way it is.

Balance is about learning to say no to what we clearly do not want, and also to the good stuff. "That apple pie looks mighty good, but I AM FULL. Thank you, but NO." It's about learning to be done rather than trying to always finish and about choosing the experiences we want to have rather than dashing about trying to have all of them.

Being at conscious choice is at the heart of Balance. Sometimes our clients forget that they have a choice in things and they lose access to their creativity. The Saboteur says, "I have to _____ (fill in the blank)." Now, any given choice will have consequences and sometimes those consequences are severe, but once you start looking from an expanded perspective, choice becomes accessible.

"The way it is," is the antithesis of resonance. From there, clients only see one way, so there can be no choice. Choice is about this or that, about choosing from a field of more than one. As Co-Active® Coaches, we need to assist clients to embody other perspectives and expand their sense of what is possible.

Before naming and embodying perspectives, coach and client must be clear about the topic of the coaching. In other words, what is it that these perspectives are about? Without a specific topic that matters to the client, perspectives are just an exercise. Here are some tips for identifying a topic that matters to your client. You can modify these steps to suit you and your client — they are simply a guide for you.

Identifying a topic that matters.

1. What is important about this topic?
2. If the topic you begin with is not important to your client, find out what is.
3. Name/clarify the topic, have client try it on, make sure it is resonant.
4. What is the client's attitude or viewpoint about this topic?
5. Does the client want to be more creative/powerful/have a shift in this area?
6. Invite client to explore their current point of view/perspective about the topic.

What follows is a review of the formula for Balance coaching. Remember that you may enter the Balance formula at any point. For example, your client may show up already inhabiting a perspective that is working for them, and be ready to move into action. In that case, the Co-Active® Coach's role is to deepen the client's learning, and bring the experience of their choice to fullness and resonance. Remember that it is essential to have a clear topic identified regardless of where you enter the Balance formula.

Generating Perspectives

- Name and explore current perspective.
- Brainstorm and explore other perspectives.

Resonant Choice

- Client chooses a resonant perspective (full of possibilities).
- Fully inhabit chosen perspective.

Co-Active® Strategy

- Brainstorm possible actions, both “Co” and “Active”.
- Narrow possibilities using yes and no for both “Co” and “Active” possible actions.
- Create specific, timed actions to make it real.

Commitment

- Conscious, witnessed declaration of commitment.
- Client can commit to big picture and/or individual actions.

Action

- Client takes action from the plan after the coaching session.

Accountability structures may be part of either the Co-Active® Strategy or commitment portion of this formula.

Generating Perspectives

Once you have named a topic that is resonant for your client and helped them explore their current perspective about the topic, you can move into generating more perspectives. The wheel is a great tool for increasing perspective. When your client is stuck or feeling victimized about something, have them draw a wheel and brainstorm different perspectives. Then have them use geography to fully embody each perspective and notice what is there. Challenging a client will increase perspective. Or ask your client, “Is that really true?” or “What else is also true?” Having clients step outside themselves and look back at themselves as they would a beloved friend increases perspective. Inquiries are often great “perspective producers.”

Resonant Choice

Once clients have generated a number of perspectives then they need to choose one to step into. When working in the formula with perspectives, be sure that your client is making their choice from a place of resonance. That your client is coming from their own true self, connected to their Captain and/or their Life Purpose, connected to that part of themselves that is alive and powerful and in their own self-authority. So you are not looking for resonance to come from the perspective they are choosing, rather, your client is coming from their own resonance and choosing the perspective most aligned with that.

For example, a client exploring perspectives about the topic of Money may be drawn to a perspective called “abundant”. Abundant is a resonant perspective for this client. However, the client, when in touch with their own resonance, chooses a perspective called Philanthropist, a place of generosity and honoring of the client’s values. Choosing the perspective of Abundant would be exciting and fun, and might lead to some incremental change for the client, yet Philanthropist is the one with deep resonance which evokes the client’s transformation to embodying more of who they truly are.

Co-Active® Strategy

Co-Active® Strategy offers the client a map for action, a way to move forward in their life by making real a transformative or resonant choice. True balance includes both the “Co”, or way of being, and the “Active”, what is being done. And in that meeting of “Co” and “Active”, there are things that the client will say yes and no to. When someone makes a resonant choice, it will include yeses and no’s both from the “Co” (being) energy and the “Active” (doing) energy. That becomes the heart of their strategy for that choice and that’s what they commit to. Our role as Co-Active® Coaches is to hold the energy of both “Co” and “Active” as our client creates their strategy for moving forward.

Commitment

Without commitment, energy cannot move in a focused, effective way. Think about someone taking a high dive for the first time. Until they are committed, they are standing on the diving board, maybe pacing, maybe just looking down at the water...and they are not really going anywhere. Once committed, energy moves in an unmistakable way. We human beings often have made up that commitment means being trapped, backed into a corner, boxed in. True commitment has joy to it, has passion to it, has a natural energy to it. You can feel the freedom and the space that it creates. Commitment is the place where the action step begins.

W.H. Murray spoke to this beautifully:

Until one is committed, there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative and creation, there is one elementary truth the ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then providence moves too. All sorts of things occur to help one that would never otherwise have occurred. A whole stream of events issues from the decision, raising in one's favor all manner of unforeseen incidents, meetings and material assistance which no man could have dreamed would have come his way. Whatever you can do or dream you can, begin it. Boldness has genius, power and magic in it. Begin it now.

— W.H. Murray, The Scottish Himalaya Expedition, 1951

Action

Most of the time, the client will take action outside of the coaching session. This is where the coach holds the client accountable.

Without action, perspectives create a lot of interesting conversation. No real change happens. Co-Active® Strategy assists a client to stay focused and get into action, and it is important to remember that what the client is up to is not ABOUT the Co-Active® Strategy that they have committed to. The Co-Active® Strategy is a tool to assist the client in being IN ACTION for the sake of living a full, resonant life.

It is vital that the coach hold always that the client has a choice and resist getting sucked into the client’s confusion or overwhelm. It is important to realize that overwhelm is not real. It is a conversation that we have about the circumstances of our lives. Overwhelm is about what is happening all around the moment, what is coming up, what else there is to be doing, what didn’t happen in some other moment and how that means something. When one is truly, fully present in the moment, overwhelm is impossible.

READING #05: INTEGRATION OF THE PRINCIPLE OF PROCESS

Process coaching is about being with clients wherever they are in their lives.

Imagine that life is like a river. Things are smoothly flowing along and then a rock appears in our path. A big one. One that, at first glance, we can't move around. Or we get stuck in the mud and can't move. Or we flow into an area of intense white water. In any of those moments, we don't get to say, "I think I'll step out of the river now...I don't like this". We don't get to say,

"I'd like to be in the other kind of river please, the smoothly flowing one". We just get to stay present, and be in the river with whatever is present with us.

As Co-Active® Coaches using Process coaching, we "be with" the client in the eddies and the whirlpools, in the mud and the white water and the wide open smooth places, in the dark, forbidding spots and in the sunshine. This "being with" is a kind of witnessing and it is a very powerful part of coaching.

It is also challenging. In our society, we are trained to fix, take care of, and produce results. We may not be very comfortable with emotion or breakdown so we dance away from it in our coaching. However, when we, as coaches, work with a client to be fully in their experience, things naturally begin to shift and move and change. That's the nature of the energy pattern of process coaching. In Process coaching, we forward the action and deepen the learning by being with the client wherever they are rather than trying to move the client out of their experience.

With Process coaching, we actually move our clients into their experience and away from just talking about it. They may be in their experience for a long or short time but we must trust that it is where the client needs to be right now. A challenge for us as coaches is not to fall into changing, fixing, problem solving or "healing" the issue; all of these responses allow the client to continue avoid being with what is.


What is important about being with what is?

When people do not want to be present to what they are experiencing, their energy becomes trapped or stuck. In addition to causing all kinds of physical challenges, stuck energy cannot be used; and when clients are able to be fully present with what they are experiencing, that stuck energy is released and can be leveraged or used to fuel forward action, vision and new possibilities.

As we witness where the client is in the moment and what is going on for them, without dancing away from it, several different things happen. First of all, the client feels known. Another human being sees their experience and, whether or not they understand it, they can be with it.

This is incredibly empowering. Secondly, when clients become connected to themselves, to what is truly going on in the moment, that alone is transformative. The client has more permission to be who and where they are. This enhances their aliveness. They expand into the fullness, the roundness and richness of being human. The amount of life available to them increases because they are no longer trying to avoid parts of their life. As clients experience their own aliveness, their energy shifts, and they move forward, including their experience. Now, they get to relax and open up to the whole range of their lives.

From the coach's perspective, this is the Process Energy Pattern at work: The coach hears "it" and names "it". "It" is something we are noticing that the client is not being present to, something that is creating stuck emotion for the client. As the coach takes the client into their



experience, and the client becomes fully present to their experience, a pool of energy opens up — an incredible resource for the client. The client can use the resources in that pool to move forward. It's a natural process, so there's no timeframe for it — it can be a moment or a month.

As Co-Active® Coaches, we are effective when we are unattached to the results of “doing” or forward motion. We need to remember that the client is always moving forward in their life. The mess and chaos and confusion and “stuck”-ness are part of that forward motion. We must trust the client and trust that things are going absolutely as they should even when our client's rubber raft is stranded on a high rock. The challenge has the client find new resourcefulness and creativity. What an opportunity for learning!

READING #06: THE CONTEXTS OF FORWARD THE ACTION/ DEEPEN THE LEARNING

If the coach has any outcome or agenda for a client in addition to transformation in the client's personal Fulfillment, Balance and Process, it is to forward the action and to deepen the client's learning (which is another way of forwarding the action). This is what coaching is about.

Deepening the learning focuses on the “being” coaching skills:

- powerful questions
- inquiry
- witness/be with the client
- acknowledgment
- championing

Forwarding the action focuses on the “doing” coaching skills:

- requesting
- challenging
- “do it now”

Co-Active® Coaching is about transformation, and clients change both by coming to a fuller awareness of themselves and how they operate, and by taking actions that create different experiences of themselves. Forwarding the action and deepening the learning are always interwoven. Taking an action that leads to a new experience of themselves also creates deeper learning for the client. Having a deeper understanding or awareness of themselves and their behavior opens the way for a client to move forward.

Deepening the learning has clients look more deeply and understand themselves and their processes more fully. Forwarding the action bursts wide open the box of what the client thought was possible, and creates new realities for the client to step into. For example, a client believes that she is not good at sales. In response to a challenge from her coach, she calls 20 people in one day and sells her product to three new customers. So much for the belief that she is not good at sales, she just established three new customers!

Powerful Questions

When you ask a question, it sends the client someplace to look for an answer. “What did you have for breakfast?” and “What is the truth about this situation?” will send the client to two very different places. Powerful questions send clients to someplace rich and juicy where there are lots of interesting things for them to look at and learn from.

Inquiry

An inquiry is a type of powerful question that is deep and wide – it is intended to deepen the client's learning and provoke further reflection. An inquiry has multiple answers, no one or two of which are “right.” An inquiry invokes investigation, reflection and connection to the client's way of living. It is not action oriented.

Acknowledgment

With acknowledgment, it is not enough to just say what is true about the client. It may be true that your client is a little “rough around the edges.” Acknowledging that they are “rough around the edges,” does not create a space for them to expand into. Acknowledge the diamond that sparkles within your client. That will have them feel known. A great way to create a bigger space for your clients is to know and acknowledge how they are living into their values. This will almost always have them feel known and create a bigger place for them to stand.

Championing

In championing clients, the coach holds that part of them that is creative, resourceful and whole. You can't know whether or not clients WILL move forward, rise to the challenge, or accomplish their dreams though you must believe that they can. In the depth of breakdown, you must hold your client both in the breakdown and in the place outside the breakdown, the success or breakthrough, and ease or freedom that lies ahead. Your ability to be with them where they are without losing sight of the big picture, creates safety for them to go fully into breakdown because they know they won't be lost forever in there. They know that you, their coach, are holding their magnificence and potential. Sometimes in the world we interact with people backwards. We have room for the magnificence in them, hoping that it will peek out, but we interact with their junk. In coaching we have space for the junk. What we interact with, however, is the magnificence.

We call forth the magnificence of the client with acknowledgment and championing. These skills are not about the client feeling good. They are about the client being known and grown. Using these skills effectively creates a bigger space for the client to expand into.

Requesting

Requesting is NOT about getting your clients to do some particular thing. It is about getting them into action or moving the energy. If your clients are not occasionally re-negotiating your requests, then you are probably not using the skill as often as it is warranted.

Remember there are three responses to any request:

1. Yes. I will do that.
2. No. I won't do that.
3. Counter-offer. No. I won't do that, but I will do this.

It is important for all of these responses to be equally acceptable. If “no” is not an acceptable response to a request, then it is not a request. It is a demand. Requesting is a general all around great skill to have. Asking for what we want is no guarantee that we will get it, but it does improve our chances significantly. Train your clients in requesting both as a skill that you will be using with them in coaching and as a tool for them to use in their own lives.

Remember, too, that a complaint is an uncommunicated request. If your client is complaining on and on about something, ask them what request they need to make and of whom. And then ask them if they will do that!



Challenging

A challenge is a mega request. A challenge is outrageous and outlandish and should evoke a response from the client somewhere in the neighborhood of “WHAAAAT?!@#!!!!!?” The purpose of a challenge is to break up the client’s reality about what is possible. If your clients are happily accepting all of your challenges, they really are not challenges. There often is hesitancy, resistance, and YIKES in response to a challenge. And, there are the same three responses to challenges as there are to requests.

READING #07: THE CONTEXTS OF LISTENING AND SELF-MANAGEMENT

In life, it is rare to experience having another truly listen to us. Instead, we talk to each other and listen to the words, or to our opinions about what is being said, or to how things impact or affect us. We speak and exchange ideas and thoughts. We share, sometimes quite intimately, our own experiences and our own feelings. We have been taught that a “good listener” is someone who is with us, attentive to what we are saying. We know that Listening is about being present, about being “with.” Coaching, however, takes listening to a deeper place, a deeper “level” of listening than in day-to-day life.

In coaching, it is not whether we listen or not, it is where we point our attention and it is the impact of our listening. The quality and focus of our listening has the client feel that they are heard and that we are with them, but it also assists us in engaging our curiosity and intuition and forwarding the action, deepening the learning. The three levels of Listening give us a larger range, an increased listening capacity, if you will.

In Level 1 Listening our attention is on us. We listen to the words that are being spoken and pay attention to our thoughts, judgments and opinions about ourselves and others. Level 1 Listening informs us about ourselves. It is the level where we figure it out and understand. In coaching, clients are usually at Level 1, looking at themselves and their lives; processing, thinking about, and understanding themselves and their relationships to the world around them more fully. The impact of this kind of listening narrows the focus down to a looking at self, and all of the feelings, thoughts, judgments, and evaluations therein. So while it is fabulous for the CLIENT to be at Level 1 (all the focus is on the client in coaching) it is not appropriate for the COACH.


With Level 2 Listening there is a very hard focus “over there” on the other person — lots of attention to the other person, but still not much awareness of the world around you. Remember the last time you were around two people who were newly, deeply in love and felt like you were invisible? There was a lot of Level 2 Listening going on there and not much in the way of Level 3. The impact of Level 2 Listening is on the client or person being listened to. You are listening for what will forward the action or deepen the learning for the client. So Level 2 informs you about your client.

Level 3 Listening opens up the hard focus of Level 2 to 360 degrees. It is all about a soft, wide-angle focus on everything: What is going on with you, the client, and the world. At Level 3 we are wide open for our intuition to speak to us in a variety of ways. Level 3 informs us about everything; about what is going on with self, client and world. The impact of Level 3 is like the impact of a pebble in a pond. The ripples spread out and touch different surfaces at different times, each surface in a slightly different way. Mastery of Level 3 is to be aware and attentive to all those impacts at the same time.

Self management is about awareness and choice... for the coach, the ability to be aware of where your attention is and the ability to choose to put your attention over on your client.

The coach is in service to the client, and does not allow personal issues or feelings to interfere with the coaching. The skill of holding the client’s agenda lives in the Context of Self-Management. Self-Management also means letting go of fixing whatever the client has brought to the coaching, and bringing your attention and focus to the person.

One aspect of Self-Management for coaches is to become very aware of and familiar with the voices of your own Saboteur, and learn to separate yourself from your Saboteur; choosing instead to coach from your most powerful self.



How does your Saboteur show up when you're coaching? For many coaches it is the desire to give value, or to ask the right question, or to better understand what the client is saying. Notice how these tendencies show up in you — and notice when you're struggling or working really hard in the coaching relationship. Something is off in those moments, and odds are there's a Saboteur in the space — yours or the client's... or both! Your awareness that something is off allows you to return to Level 2 and Level 3 Listening, and to return your attention and focus to the person you are coaching.

Remember that the coaching is not about the coach, AND you have a job to do. Sometimes you'll manage yourself INTO the coaching, and sometimes you'll manage yourself OUT of the coaching. Consciously choosing when and how to dance in and dance out of the coaching is an expression of Self-Management.

READING #08: THE CONTEXTS OF CURIOSITY AND INTUITION

A Co-Active® Coach is endlessly curious and fascinated with people in general and with their clients in particular. For example: What makes them tick? Where do they, particularly and uniquely, get stuck or hung up? What are the “life lessons” that they need and/or want to learn? Each client is special and unique and sees the world very differently than you do. It is critical that you remain curious about these differences and fascinated by the unfolding of their particular perspective. So often, coaches get caught up in the “problem” or “issue.” While clients will bring specific problems or issues to the coaching session, the real juice, the real “meat” of coaching lies in the bigger picture, in the metaview. What does this issue tell you about your client? What is there for them to learn here, about who they are and how they have this tenuous thing called “reality” wired up? Co-Active® Coaches point their curiosity through the language and concepts of the principles toward resonant meaning, possibilities and choice.

In the coaching relationship, everything that occurs is an opportunity to coach, if the coach can remain curious and unattached. If your client is often late to coaching calls, or gets resistant or is not paying you or wants to quit coaching; rather than getting upset and judgmental and attached, get curious. What is going on? What is this about, really? Are there other places in the client’s life where these issues surface? From your very first enrollment conversation through completion with your client, it is important that you be a coach, always, standing firmly in a place of commitment to the richness of their lives and more committed to their greatness than to your own fears and insecurities.

Non-attachment means that you know that it is not about you. Of course, if you have made a mess somehow, it is important to clean it up and not “step over it” or ignore it. Even then, however, your attention is focused on your client and on healing any rip or tear in the coaching relationship as quickly as possible. It is not about being right or wrong or defending or justifying. The question to hold in your mind is: “What will serve this client?” Not necessarily what will help them get the “things” they think they want, but what will help them grow and learn and become more fulfilled.

Non-attachment means that you give your clients permission to be themselves and to tell the truth about what they value and care about. This kind of permission is so rare in the lives of most of our clients.

Non-attachment also means that you offer your intuition without concern about being right.

That you offer your intuition to serve your client’s learning or forward action.

As a coach, you hold a special place for your client which is more about who you “be” than what you say or do. You are the place where their true self lives brightly, always. They need to know that you hold them as capable, creative and resourceful — that you have room for their Saboteur, their fears and limitations, and yet you are committed to interacting with their magnificence. They need to know that you will be compassionate with them, but will not be a place where they can play small. They need to know that you will ask them to be responsible for how powerful they are, rather than buying into or colluding with their limiting self-talk.

As a coach, you need to be willing to lose your client at any time; otherwise you will inevitably play it safe and hold back in your coaching. You must be willing to be straightforward with your clients, and at the same time, authentically champion and acknowledge them so that they know that you are on their side. Most of your clients are starving for this kind of straightforward interaction. It lets them know that you really care about them and that you are committed to their lives being great.

Coaching is not something that you just do, it is something that you are all the time. It is an orientation to life that celebrates and embraces the uniqueness in each individual and that is endlessly fascinated with the creative “messiness” of life. Being a coach is an opportunity to let go of our own personal smallness and limitation and stand in a place of spaciousness, creativity and possibility. It is an orientation that has us committed to excellence and possibility rather than limitation and fear. Co-Active® Coaching, above all else, holds that all individuals are hungry to learn and grow and become ever more effective human beings.

Do you believe or trust your intuition? Intuition is one of the most challenging coaching Contexts to develop. First of all, it is hard to really see, explain, or understand. Secondly, we do not live in a culture that offers much support or training in intuition. From an early age we are taught to “know” rather than to “intuit.” We are taught to HAVE sense rather than TO sense. The catch is that the only way to really develop our intuition is to begin using it, to bypass our brain, open our mouths and begin talking BEFORE we know what we are going to say.

Intuition is never wrong. However, our interpretation of it can be incorrect. Was that intuition or indigestion? Intuition or nerves? Intuition or the Saboteur? It can be difficult to distinguish the difference. The good news is that it is not critical that our intuition be correct. We need to be willing to just throw our intuition out there without attachment. Often a client will benefit greatly from an intuitive blurt that is completely inaccurate. “No!” they will say. “That’s not it at all. It’s this!” They will become clearer on what “it” is for them.

What is Intuition? We believe that there is a place, a “well” of knowing which holds an inherent intelligence. Not smarts or education, but knowing. Intuition is the ability to access or tap that well of knowing. Intuition is not the information itself; it is the ability to ACCESS that information. That access-ability is what we are developing when we develop our intuition. Just like our triceps muscle, our intuition is there within us, often atrophied from lack of use. We all have intuition, just like we all have a triceps muscle. It is just that some of us have had more opportunity to exercise that muscle and therefore our ability to use our intuition, our access-ability, is more fully developed. Fortunately, coaching is a real “intuition gym.”

How do we establish trusting or believing intuition? How do we develop our access-ability? Unlike our triceps muscle, which is found in about the same place in all of us, the intuition access point lies in different places for different people. When you first begin working out with a physical trainer, s/he will often put his/her hand on the muscle that you are working so that you can “find” it. The same thing is true for intuition. First, you need to discover where to look for your intuition. Then you need to remember to look for intuition (because when our intuition is underdeveloped, we may not even think to look). Lastly, we develop our intuition muscle by using it, by blurting or speaking it, by letting go of our attachment to being right and not caring where “the truth” comes from.

As we work with these three steps over time, we develop our access-ability. It may not seem particularly easy because it is unfamiliar and goes against most of our education. It may not be easy, but it is simple.

A tip to ease the learning process is to name when you are speaking from your intuition. Phrases like, “My intuition tells me...” or “I have a sense that...” or “My hunch is...” are some ways to articulate what is going on from your intuitive knowing. Naming that you are speaking from your intuition will invite the client look more deeply and, quite often, will help them become clearer about their experience or open up new possibilities for movement – whether or not your interpretation is accurate!

READING #09: COACH THE WHOLE PERSON, NOT THE TOPIC

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

A Co-Active® Coach is committed to coaching the client in their evolution as a human being. This is the bigger context in which the client is living their life.

A Co-Active® Coach's presence, and everything that the coach does in a coaching relationship is consciously in service of the client's transformation. It is the Co-Active® Coach's responsibility to have the client see and experience their own magnificence and to create a container for the relationship that calls forth the client's very best self. The coach calls forth what the client deeply knows about themselves, yet does not always remember or see clearly. The coach is always holding the Cornerstone of evoking transformation, keeping it front and center in the coaching relationship, and reminding the client of who they truly are when the client forgets.

The Cornerstone of evoking transformation calls the coach's attention to the authentic naturally creative, resourceful and whole person that inevitably lies beneath struggles and challenges. With transformation 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 identify a resonant choice that moves them forward – beyond solving the issue or problem or addressing their circumstances. The 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.

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.

The impact of this is that the coach insures that the client does not forget who they really are, and 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 client naturally creative resourceful and whole, and holding the agenda of transformative change, 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 doing this within a coaching relationship, client and coach can create a resonant map for the client that helps clarify the decisions needing to be made, and the actions needing to be taken, all in a larger context than the circumstance of the moment.

It is the coach's role to evoke transformation in the client, even when the client is scared. The coach keeps seeing the client as the magnificent person they are, as the full expression of their true self, best self, divine self, yet also has the 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 their life according to their own unique dreams, vision, purpose, heart, desire. 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.

Then it is straightforward for the coach to 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 from the stance of the four Cornerstones, 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.

READING #10: ETHICS

Throughout this Certification Program, you have been exploring the Co-Active® Coach, a wide range of coaching skills, and ways to grow yourself as a Co-Active® Coach. Now we are going to take a metaview of the coaching profession, with a focus on ethics.

Ethics matter to a profession because professional standing both implies and engenders the trust of members of the public. There is a public expectation that professionals are objective and independent. An ethical code honored by members of a profession is one way to safeguard the public's trust. John W. Lewis, MD, JD, writing for the Institute for Global Ethics, said it succinctly:

“The overriding rule of professional ethics is that... the interests of the served public always trump those of the providers.”

The Coaching Profession

Coaching is a growing profession. The International Coach Federation (ICF) is an association that provides support, guidance and governance to the coaching profession. As an ICF-accredited school, CTI encourages all students to join and actively participate in the ICF.

In addition to continuing education, accreditation of coaching schools, and credentialing of qualified coaches, the ICF has developed Ethical Guidelines that all members must agree to follow, as well as a system to address ethical breaches by coaches.

Visit the ICF website www.coachfederation.org for more information about how the ICF addresses ethical issues in the coaching profession.

Values, Morals, Ethics

There are some differences among the concepts of values, morals and ethics, and sometimes they overlap. It is important for you to be really conscious of your own values, the morals that you live by, and your own ethical stance. Also important, as a professional coach, is that you abide by the ICF Ethical Guidelines for Coaches, and as a Co-Active® Coach, that you abide by the Ethical Standards for Co-Active® Coaches.

In the Reference section of this Manual, you will find a number of articles and websites that address professional ethics. Take some time to read these to further stimulate your thinking.

When ethical questions arise for you, one powerful resource that is available to you is the Co-Active® Model. Lean into the Model by considering questions like these:

- What does your client want?
- What is the transformation you envision for your client?
- What needs to be articulated or named in this situation?
- Where is the resonance or dissonance in this situation? What does that tell you?
- What about your own Self-Management, your Listening at Level 2 and Level 3, your curiosity?
- What does your intuition tell you?

- What is needed to design the alliance more fully for you and your client?
- What is the safe and courageous space of your ethical stand in this situation?
- What does your Captain tell you is needed here?

As you explore these questions, you will deepen your learning, opening the space to forward your action, or perhaps you will act first, and then consider these questions as you deepen your learning.

What else could you ask yourself with the Model as your guide?

Conflict of Interest

A conflict of interest occurs when you have a personal interest in a situation, and your personal interest might or actually does influence the professional and independent judgment you exercise as a coach. One example is when you are holding multiple roles with someone that you are coaching. For example, you might be coaching a friend's spouse or a colleague with whom you have been working on a project. Even the appearance that your personal interest is affecting your professional judgment is a conflict of interest. When there is a possibility of a perception of a conflict of interest or a breach of trust, even if what is actually happening is completely ethical, the possibility that something unethical might be perceived is more important than the actual situation.

Since anyone's personal interests can affect their ability to be objective, it takes some skill, experience and your best judgment to recognize when you are in a conflict of interest. It is often much easier for us to recognize when others are in a conflict of interest. For this reason, many ethics scholars recommend that you talk to a trusted colleague or friend if you are unsure about the ethical implications of a situation.

While a coach's involvement in a conflict of interest can certainly harm a particular client or employer, as well as the involved coach's professional reputation, their involvement can also damage the reputation of the coaching profession as a whole. Abandoning one's professional judgment reduces the public trust in a profession. As a professional coach, you are always representing the profession of coaching to the public, whether you are in a coaching session or on vacation.

As soon as you recognize that you are either moving toward or involved in a conflict of interest, find a straightforward way out of the situation. If that is impossible, articulate what is going on to all of the affected individuals. By responding in this way, you can maintain your professional integrity and preserve the trust that is essential to your professional standing and the standing of the coaching profession.

Ethical Issues, Dilemmas, Challenges

Many of the ethical questions that will surface in your coaching experience may seem to have obvious answers, or you may have addressed them with your client as you designed your alliance. Those straightforward issues simply require your own clarity about how you will respond in a given situation. What seems obvious from the outside is often not obvious from the inside.

Sometimes you will encounter questions whose answers are fuzzy at best, areas that are unclear, or situations where different people respond differently or disagree about the ethical response. Membership in the ICF serves another important function here, as you can tap into the wisdom of your professional colleagues, whether they are local or far away.

Here are some examples of challenging issues that you might encounter. How would you approach each of these scenarios?

Your client has lost her job and is facing bankruptcy.

1. Her check for last month's coaching has just been returned to you for insufficient funds. What do you tell her?
2. She wants to charge her coaching fees with you to her only remaining credit card. What do you say?
3. What if your client lost her job and she was facing a medical illness rather than bankruptcy? How do your responses compare to one another? What, if anything, is different for you about each scenario?

You have a coaching contract with a large corporation. One of your ongoing coaching clients tells you about his plan to leave the company and begin his own business with the same customer base. He has not told management. The company is paying your coaching fee.

1. What do you do?
2. What if the company is a small local business? A family business? What, if anything, changes about your response?

Your client, who is an executive at a well-known corporation, tells you about a revolutionary new product to be released by her company in time for the holiday shopping season.

1. Do you buy stock?
2. Do you tell friends/family or others who might benefit?

Your client invites you to be his business partner for a small contract he is about to receive. He also wants to continue coaching with you.

1. What would you do?
2. What if your client's contract was a large contract? Would your response change?

You have a professional relationship with your client's spouse. In fact, he referred your client to you. Your client reveals to you that she is having an affair.

1. What would you do?
2. What if you didn't know your client's partner? Would your response change? What, if anything, is different?

In addition, consider these questions:

- When would you refer a client to another professional?
- Under what circumstances would you ethically decline to take on a new client?
- How do you tell your client that your ethical considerations call for you to complete the coaching relationship?

- What is your ethical responsibility to former clients?
- What if your client desires to commit a morally reprehensible act, or a criminal act, or to cheat a little bit on their taxes, or to drive over the legal speed limit, or to embezzle funds, or to use company time or materials for personal needs, or....
- Where do you draw the line? How do you sort that out?

A Tool for Exploring Ethical Dilemmas

Consider your approach to ethical dilemmas as concentric circles moving out from the client to larger circles around them and the coaching relationship. First identify everyone who may potentially be in these circles. Then drill down into the possible actions you might or might not take, and what impact those actions might have. With this big picture in mind, your ongoing designed alliance with your client will support you as you address the various relationships and people that might be impacted in a particular situation.

When you get that “red flag” feeling, your best course of action may not always be clear. Because there are often many complexities in an ethical dilemma, it is extremely important for a professional coach to thoroughly think through every ethically challenging situation.

Here are some questions to consider and support you in thinking through ethical issues:

1. What is the impact on my client? On our relationship? On me as a coach?
2. What is the impact on the perception of the coaching profession?
3. Who/What else may be impacted by this situation?
4. What effect could it have on them?
5. If I take an action or do not take an action, how will that affect those mentioned above?
6. What action will I take to resolve, clarify or manage this situation?

Ethical Standards

As the leading association for professional coaches, the International Coach Federation has developed an Ethical Code for coaches, which contains the ICF Ethical Guidelines, as well as a system to address ethical breaches by coaches.

The full text of the most recent ICF Code of Ethics, as well as the Ethical Guidelines for Coaches may be found on the ICF website: www.coachfederation.org. Be sure to read through the Q&A section on the ICF website, too. You will find some current ethical dilemmas faced by coaches and other rich resources there.

In addition to the Co-Active® Model and the ICF Code of Ethics, the Ethical Standards for Co-Active® Coaches that follow will also guide you as you explore ethics and coaching. Coaches certified by CTI agree to abide by the Ethical Standards for Co-Active® Coaches.

Ethical Standards for CoActive® Coaches

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 their name.
2. We do not break the law for our clients, nor do we act as accomplices to a client's acts of violence or law breaking.
3. We do not enter into financial agreements with a client based on the client's results; e.g., the client will give the coach a 10% bonus based on the sales bonus they receive from their corporation. The coach does not expect or solicit any gifts or rewards from the client. Any gift from client to coach is unsolicited and completely at the client's discretion.
4. When we enter into agreements with corporations, we hold each individual we coach as a client, and we respect each client's right to confidentiality.
5. We do not work with clients whom we cannot champion and see their growing edge.
6. We are committed to our client's transformation and use rigorous Self-Management so that we are fully able to hold the client's agenda rather than our own.
7. We treat our colleagues, competitors and the coaching profession with honor and respect.

Professional Integrity

Your standards of professional integrity may come more clearly into focus when you're facing a challenging client situation. There are a number of fairly common situations that coaches may encounter which challenge the coach's professional stand. We offer a few of these here to give you an opportunity to consider how you would respond in similar situations. At the end of this chapter, we offer some suggested ways to approach situations like these to stimulate your thinking, and as a reference for you going forward.

- Your client routinely misses their appointments.
- Your client is delinquent in paying you.
- Your client asks you to use your name as a reference for a job application.
- Your client makes disparaging comments about a group of people — based on ethnicity, age, or religion, etc.
- Your client discloses, in passing, that they belong to a group that promotes segregation.
- Your client is recently divorced and is having unprotected sex with multiple partners without telling any of them.

It is important for you as a coach to have a plan to address each of these situations so that you will be able to move forward easily if you experience a similar situation. Once you are clear about what you would do, CTI recommends that you write up a policy, and include your policy in the logistics section of your discovery session materials. By doing this, your designed alliance with each of your clients will include how you will address some of the more common challenging situations that may arise in your relationship. Of course, the unexpected comes up, and there will be situations that you haven't anticipated.

Possible Approaches to Challenging Client Situations

Missed Appointments

Most clients will miss an appointment during the course of a coaching relationship. After all, things do come up in life. When clients miss, it's usually due to something unexpected — an emergency, a change in plans at work, or something unexpected in their day. Sometimes, a client will get involved in a project and think: "I have 10 minutes until my coaching session; I'll just get into my email." They get lost in that and forget the appointment.

Sometimes, there is another issue below the surface. Here are two examples; there are many other possibilities, too.

1. Your client decided it was time to start working with a coach. Soon they realize that coaching is about changing their life, and they get scared and stop calling
2. Your client has missed a coaching session, and they are too embarrassed to return your call.

When you are working with a client who has missed a coaching appointment, first, get curious about your client — who are they? Is this a pattern or a one-time occurrence? Then, consider how you want to handle this situation with them. Is it an issue for coaching or for designing your alliance in more detail? It is easy to get irritated when someone misses an appointment, and it may provide an opening for deepening the coaching relationship if you bring your curiosity instead of your irritation.

In creating your client agreement, consider these questions:

1. How would you like to be notified if something comes up and your client needs to miss an appointment?
2. How will you work with a corporate client who gets pulled into an important meeting at the time of your coaching session?
3. How will you inform your client or ask your client to inform you that there is a need to re-design your alliance?

If missing appointments is routine for your client, it is something for you to bring into your coaching with them. Find out what is going on for them. Is this something that happens elsewhere in their life? What is it for them to keep their word? What is it for them not to keep their word? How do they handle agreements?

Late or Delinquent Payment

How will you work with clients who are late or delinquent in paying you? What is your payment agreement? How will you work with someone whose payments are late or don't arrive at all? Sometimes this is a possible issue for coaching; other times you will want to redesign the alliance or even terminate the coaching relationship. Be clear about your policy on these types of issues, and also look carefully at each individual situation that arises to see what is needed in your coaching relationship.

We also recommend that you talk with other coaches and learn about how your coaching colleagues address missed appointments or non-payment. At CTI we recommend that you charge your full fee for missed appointments. You have reserved and held your client's appointment time whether they show up or not. So, treat yourself as the professional you are

and charge for your professional time. And, if you intend to charge for missed appointments, include this information in the logistics section of your designed alliance.

If these types of issues turn up frequently in your coaching relationships, look to the metaview.

And look at yourself. The issues that you are working on in your own life often show up in your clients. Are you someone who keeps appointments? Are you routinely late or forgetful? Do you call to change appointments or do you wait until the time has passed? Do you pay for professional services in a timely manner? What else might your client's behavior be reflecting back to you?

Terminating a Coaching Relationship

You may decide that it would be best to complete a coaching relationship for any number of reasons. Be sure to include as part of your designed alliance how both you and your client will close or end your coaching relationship. We recommend that notice is given in time for at least two scheduled sessions to be devoted to the closing. During these two sessions, share what worked, what didn't work, and what each of you needs to feel complete. Champion your client and send them off with acknowledgment and gratitude.

If your client has missed several appointments, or has not paid you for their coaching time, and you have decided to end the coaching relationship, send your client a letter of intent to terminate, as described below. Your client may respond by saying they do want to work with you, and now once again, you choose whether you really want to work with this client. If you do decide to continue working with them, redesign your alliance, and set some firm parameters. If not, it is recommended that you keep a letter in your files to document your actions with this client.

Here is one way you might work with a client in one of these situations. This example is for someone who has missed one or more coaching appointments, and you can apply it to other situations as well, simply changing the details:

1. If this is the first time that your client has missed an appointment with you, call them within five minutes of their scheduled time. Honor whatever time is remaining in the appointment, and end the call at the usual time, rather than trying to make up the time the client missed.
2. Remind them of your agreement about missed appointments. Let them know that you prefer to hear from them at least 24 hours ahead of time if they need to reschedule, and that you generally charge for a missed appointment. We recommend that you waive the fee for the first missed appointment.
3. Let's say that they miss again. Again, we recommend that you call them five minutes in and continue the coaching session to its usual ending time if you are able to. If not, remind them of your conversation after their last missed appointment, and tell that you will be charging them the full fee for this missed appointment.
4. If you're unable to reach the client directly, leave them a friendly voice message — and remember Rule #1: nobody gets to be wrong. Stay curious. Let them know you are just calling to check in, that you were looking forward to working with them, that you understand something must have come up, and to please give you a call to reschedule.
5. If there is no response after a few days, leave a second message, also friendly. Keep the message authentic for you. Some examples: "I'm wondering since I haven't heard from

you, is everything OK?” Or, “Let’s get started; give me a call so we can set up a time to meet.”

- a. If you still don’t hear from them, you might send them an email requesting that they contact you.
- b. After you have tried to reach them three times without hearing back from them, it is time to let the relationship go, and you can send them an email to that effect.

Referral to Therapist

Sometimes coaching is not what is needed. It’s not always black-and-white, but there are some red flags to watch for that may indicate that therapy is the better approach or would be a good adjunct to the coaching. Here are some examples:

- Client is persistently consumed by their Saboteur, and is not able to separate themselves from it. Of course, we all have times when we are consumed by our Saboteur, and we typically can separate ourselves from it, even in small doses.
- Active addiction not being dealt with...
- Client’s forward movement is impeded by issues from their past that are not healed.
- Client needs to take medication for a mental health issue and would benefit from working with a mental health professional.

The challenge for the coach is to refer the client to a therapist or other professional in a graceful and respectful manner so the client feels supported rather than wrong or broken. It can be helpful for the coach to state that they are not trained to work with the types of issues the client is facing. For example, saying “Client, this is an issue that would be best addressed by someone who is trained to work with this... it is outside the scope of my training as a coach. I want the best for you and I think you will be better served by working with a therapist who has the training to address this area with you” rather than saying “You need therapy.”

Working with a therapist does not mean that they can’t continue working with you as their coach, or that they won’t return to coaching later in their process. It just means that the support of a relationship with a therapist will serve your client at this point. For some clients, it works well to have both a therapist and a coach, with clear agreements about the focus of each relationship.

Unusual Situations

Some questions you may have relate to serious circumstances that rarely happen. Did you know that in addition to obeying the laws in the country and location where you live and work, you may also be obligated to follow the laws in the locations where your client lives and works? If you work with clients outside of your geographical area, it is a good idea to learn about what is expected of you as a professional coach working with a client in the location where they live. You may need to do some research to get this information, and we recommend that you do so. Check the ICF website and local coach associations where your clients are located. You may also want to consult an attorney or a local government office for more information.

For example, in many states in the U.S., it is a coach’s responsibility to report that a client is contemplating suicide. Coaches in the U.S. may also be obligated to report suspected abuse to the appropriate authorities. This may occur if you learn, or you have reason to believe, that your client is being abused, or is abusing someone else. You would then need to contact the Social Services department where your client resides.

It is important to tell your client in the Discovery Session about situations like these where you would breach confidentiality.

Should you encounter a situation where your client sounds depressed or possibly suicidal, here are some guidelines about how to go forward:

If the client divulges to you that they are thinking about suicide, you can assume that they are asking you for help as best they can. In this type of situation, do whatever is needed to know that your client has help or support before you hang up the telephone.

First, keep them on the line. Ask them if there is someone with them, or if there is someone, perhaps a family member or a social worker, that either you or they could call on a second line, while they are on the phone with you. If neither of you know of someone who could help, call information and find out how to reach your client's local mental health crisis line. If you cannot locate a crisis line in your client's area, call the one in your geographical area. They may be able to help you locate the right number to call on your client's behalf. We also recommend that you check in with your client within 24 hours – either with the client themselves or with one of the people who is helping them. Find out how your client is doing, and follow up to make sure that they are getting the help that they need.

Work with your client to design some accountability around the ongoing help they will get for themselves once any type of crisis has passed. Offer whatever assistance you can to help them set it up, and work with them to find other people who will help and support them, too. Remember, your coaching relationship is a partnership. Partner with your client to get them connected with good people who can help support them.

If your client tells you that they are doing something illegal, or you suspect that your client might be breaking the law, here are some steps to take:

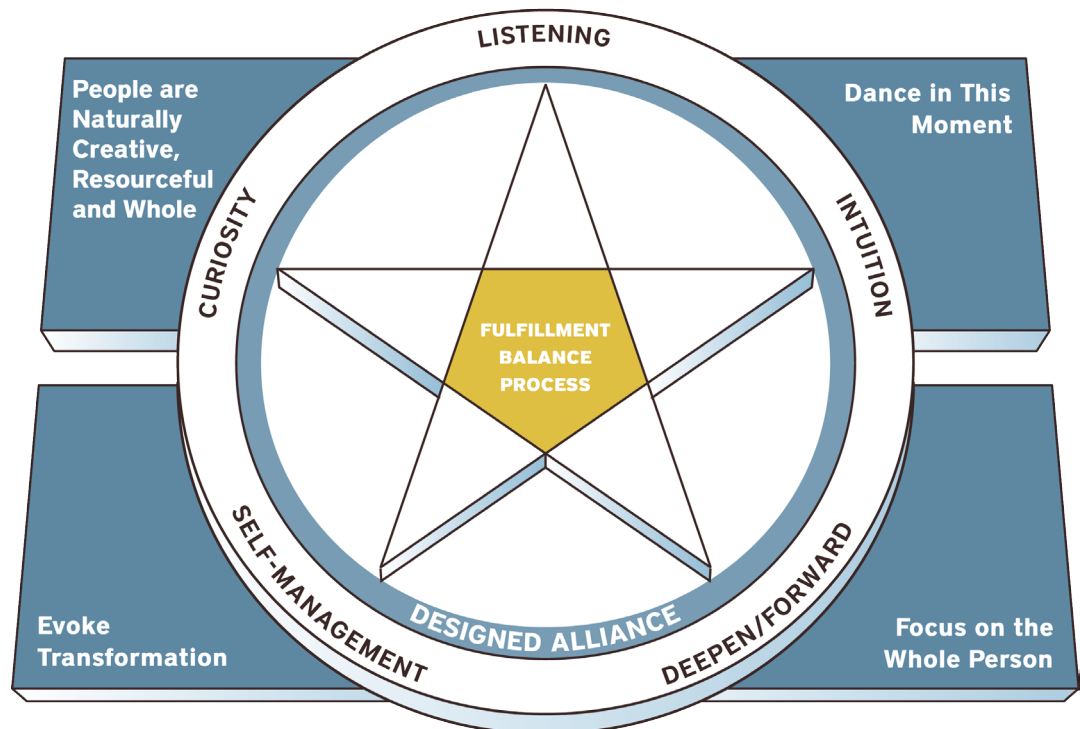
1. Review the International Coach Federation (ICF) ethical guidelines and the Ethical Standards for Co-Active® Coaches. If your client is breaking the law, both sets of ethical guidelines and standards state very clearly and simply that coaches do not partner with clients around issues that involve breaking the law.
2. If you suspect that your client may be breaking the law, or you are uncomfortable for any reason about your client's actions, these are some steps you might follow:
 - a. Consider your own values. What's important to you? Considering how you feel, are you willing to coach someone in this situation?
 - b. Touch base with a trusted colleague or two while maintaining your client's confidentiality. What do other coaches think about this? What's the best way to handle this?

Remember that in any challenging situation, there is an opportunity for coaching and for learning, for both you and your client.

READING #11: BRINGING IT ALL TOGETHER

In polishing the learning of new skills and tools, it is valuable for learners to step back to assess their strengths and identify the places they get stuck. As you consider the experiences that you have had as a Co-Active® Coach in training, notice where the coaching comes easily to you and where you are challenged.

THE CO-ACTIVE® MODEL




Sometimes a coach is uncomfortable with what is happening in the coaching session or in the coaching relationship. Perhaps the skills called for are not the ones you are most familiar with, or perhaps you are being called forth to further expand your coaching range, or possibly your personal beliefs, attitudes or opinions conflict with what your client is doing or saying.

Part of the coach's role is to hold our clients (and ourselves) naturally creative, resourceful and whole. And the Cornerstone of Dancing in This Moment includes the Co-Active® Coach's ability to respond to all kinds of client situations.

Once you become aware of your discomfort, depending on the situation, you may choose to focus on building your Self-Management muscles. What is it that you are avoiding in yourself? What perspective are you in about this client? What is here for you to learn about your own transformation? What might you explore with your own coach?

Are you in a state of reaction? Being in a reactive state will narrow the range of options available to you. How might you strengthen your ability to respond? Leaning into the Context of Curiosity will support you. What is happening here? What is here for you to discover about yourself? What is here for you to grow or stretch into?



Yet another area to consider is whether it is time for you to expand your range as a coach. Where do you hold back? What are you concerned about? What do you not dare to say to your client? What is too outrageous for this coaching relationship?

Another option is to re-visit your designed alliance to see what needs to change. Maybe you need to make requests of your client? Or create new agreements together? Or clarify your role as their coach? When your client's behavior or comments irritate you to the point of impacting your ability to see their full potential or impact your relationship with them, this needs to be addressed. It is also useful to articulate what is going on to lead into a re-design conversation. For example: "Client, I notice that you have some very strong opinions. I'd like us to talk about how we will work together when you share those, because sometimes I get a little hooked and it distracts me from partnering with you to work towards your goals."

And, lastly, you might choose to end the coaching relationship. When you are not able to fully see your client's potential, it may be time to refer them to another coach. This is not a failure on your part; coaches are human too, and sometimes it is just not the best match. You have their best interest at heart... you want them to have a coaching experience that is full and rich and transformative. The challenge here is also to be graceful and respectful; to complete from an honest place that honors both of you. For example: "Client, I am really working hard to manage my discomfort with the way you are dealing with your newfound sexual freedom. As your coach, I want to champion you and support you in all ways, and I just have too many opinions and too much personal experience and it's getting in my way. I think it will be best if you work with a different coach that can be fully present with you."

READING #12: EVOKING TRANSFORMATION

It takes strength and muscle to be the most effective Co-Active® Coach you can be, and one important step is **OWNING** your own authenticity and range as a coach.

Where are you now in your identity as a Co-Active® Coach? What is between you and seeing yourself fully in this new role? How will you acknowledge who you have been as you have grown and developed as a coach and a human being over these past several months? What does this have to do with how you are with your clients?

We call forth the magnificence of our client with acknowledgment and championing. These things are not about the client feeling good. They are about the client being known and grown. Using these skills effectively creates posture for your client, standing tall, and a bigger space for them to expand into. Where are you expanding into?

Just as we co-create with our clients through Co-Active® Coaching, each of us co-creates our world with our thoughts, our actions, our dreams and visions. As we focus our energy and conscious thought to what we want to create, rather than what we don't want, or what we want to move away from, our vision expands and more becomes possible. Where is your conscious attention? Which part of you is guiding your thoughts and actions? Your Captain or your Saboteur? Here is an old story, the Tale of Two Wolves. One version goes like this:

One evening an old Cherokee told his grandson about a battle that goes on inside people. He said, "My son, the battle is between 2 "wolves" inside us all.

One is Evil. It is anger, envy, jealousy, sorrow, regret, greed, arrogance, self-pity, guilt, resentment, inferiority, lies, false pride, superiority, and ego.

The other is Good. It is joy, peace, love, hope, serenity, humility, kindness, benevolence, empathy, generosity, truth, compassion and faith."

The grandson thought about it for a minute and then asked his grandfather: "Which wolf wins?"

The old Cherokee simply replied, "The one you feed."


Which wolf do you feed regularly? What are some practices you might take on to continue to feed the "Good" wolf?

At this point in your Certification Program, you are probably quite aware of both of those wolves, and the impact that they have in evoking your own transformation. Living the Co-Active® Way calls us forward to include our whole selves, and also to be at choice about who gets to run our lives, so that we can continue to become our most magnificent selves. Coaching is ultimately about being of service, and when we bring our best selves to this role, we have the most range available to serve our clients, ourselves and the world.

IN THE SERVICE OF LIFE by Rachel Naomi Remen. M.D., adapted from a talk given at a conference of the Institute for Noetic Sciences in July, 1995, and reprinted in the Noetic Sciences Review, Spring 1996:

In recent years the question HOW CAN I HELP? has become meaningful to many people. But perhaps there is a deeper question we might consider. Perhaps the real question is not how can I help? but HOW CAN I SERVE?

Serving is different from helping. Helping is based on inequality: it is not a relationship between equals. When you help you use your own strength to help those of lesser strength. If



I'm attentive to what's going on inside of me when I'm helping, I find that I'm always helping someone who's not as strong as I am, who is needier than I am. People feel this inequality. When we help we may inadvertently take away from people more than we could ever give them: we may diminish their self-esteem, their sense of worth, integrity and wholeness. When I help I am very aware of my own strength. But we don't serve with our strength, we serve with ourselves. We draw from all of our experiences. Our limitations serve, our wounds serve, even our darkness can serve. The wholeness in us serves the wholeness in others and the wholeness in life. The wholeness in you is the same as the wholeness in me. Service is a relationship between equals.

As you enter this next chapter of your story as a coach, a chapter that you are dreaming even as you read this, what are the possibilities that you are committed to? What dreams will you bring into being as a Certified Professional Co-Active® Coach? What is the impact you will make in your own life, in the lives of those you love, in your community? What is the unique contribution that you will make?