

Co-active[®] Coaching Balance

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BALANCE COURSE OBJECTIVES

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

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

- >> Have your clients look at any situation from a number of perspectives.
- >> Coach clients to make choices including choosing one perspective from the ones they've explored.
- >> Have clients come up with an alive plan for action that arises out of the perspective they've chosen.
- >> Bring clients to the place of commitment.
- >> Use structures to keep clients in action.



“Until one is committed, there is hesitancy, a 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 have otherwise occurred. A whole stream of events issue from that decision, raising in one's favor all manner of unforeseen incidents and meetings and material assistance, which no man could have dreamt would have come his way if he was still doing his thing. I have learned a deep respect for one of Goethe's couplets:

“Whatever you can do or dream you can, begin it.
Boldness has genius, power and magic in it.”

— William H. Murray, The Scottish Himalayan Expedition (1951)

Section 1

Basics

In most cases, clients don't come to coaching because they want to get into action. They're already in action. In fact in most cases our clients are in action up to their ears. The reason they are coming to coaching is because they are not getting the results they want from the action they are taking. They want different action, maybe even less of it. Whether they realize it or not, every day they are making choices and the choices become a life. Often, clients don't see that they have choices; what they see instead is that they don't have choice. They say things like "that's reality," or "I can't because..." or "that's just the way it is with me." Part of our job as coaches is to break open this blindness and help clients see that they really do make choices, even on the days when it feels like their world is running the show.

At its most fundamental, coaching for Balance is about helping clients become conscious of choice, and helping them make life-giving choices. The result will be a life of alive, empowered, effective action leading to a more fulfilling life. By the way, this is why the CTI Intermediate courses begin with Fulfillment. Coaching for fulfillment gives clients a sense of the destination: What would a fulfilling life — a valued life — look like, and feel like? Once they have that in mind, it's time to make choices to make it real. In the Balance course we build on the vision created in Fulfillment.

It's important to emphasize here that "balance" takes place in the midst of action. Life Balance is not the same as equilibrium; it is not about having the same weight on each component of their lives. Equal parts of family, work, recreation, etc., is not the goal. There is a moving balance point with these significant areas of the client's life and that's where the coaching is headed. Also, be aware that there is no point when life will finally be "in balance." There is no resting place except "The Final Resting Place." As long as we're alive we will be moving toward more alignment with the balance we want, or we will be moving away from it.

It may help to think of this course as the "Balancing" course, rather than the Balance course, because the focus is the action of balancing the many elements of a client's life. This could also be the juggling course or even the juggling-while-riding-a-unicycle course because that is often what it feels like to clients. They are moving, usually at high speed, through their lives, watching for obstacles while they toss and catch priceless treasures: career, family and friends, health and wellness...well, you know the list. In this course we are moving into action.

MOVING FORWARD – STEP BY STEP

There is a formula for moving into action that is introduced in this course. The course itself pulls apart each factor in the formula and focuses on it. In a typical coaching session you might cover all of the steps in the Balance formula, or you might spend a whole coaching session on any one step.

The formula looks like this:

- >> *Perspective* — how do clients view this topic or area of their life?
- >> *Choice* — clients have the power to choose how they view their world.
- >> *Planning* — moves clients from “good ideas” to concrete, make it real steps.
- >> *Commitment* — asks clients to step over the line with a resounding “yes,” and leave behind what must be left behind with a resounding “no.”
- >> *Action* — in which we are reminded that the real action of coaching takes place in the client’s life, not in the coaching session.

THE BALANCE FORMULA

PERSPECTIVE ➡ CHOICE ➡ PLANNING ➡ COMMITMENT ➡ ACTION

PERSPECTIVES: THAT'S ONE WAY TO LOOK AT IT

This is a very simple, but sometimes-elusive truth: The way we look at things makes a difference. Here is a familiar, general example: “Blondes have more fun.” Notice your tendency to take a stand, as if this is either true or false. It doesn’t really matter. What matters is, if you take this on as a belief, or a way of looking at life situations, things are colored in a certain way. If you’re a blonde, you probably expect to have more fun. If you’re not a blonde you’re either wishing you could be one, lamenting your bad fortune, or coming up with an alternative perspective that lets you have fun too!

Perspectives are expressions of a “being” condition, a state you are in. If I ask you to think of your life right now, today, in terms of the seasons of the year, would you say this is a “winter” time in your life? Spring? Autumn? Or summer? I don’t even have to know exactly what you mean by your definition. Each of these is a perspective, a different way of looking at the same data: your life. If you’re going to a meeting, or family gathering, or out on a date and you are “dreading it,” you are in a perspective. The circumstances of the event will be essentially the same no matter what perspective you are in, AND your way of looking at the situation will have enormous impact.

Complete these sentences to notice your perspective:

- >> Being single is...
- >> The holiday time of year is always...
- >> Entertaining friends in my home is...

Notice an inclination to want to argue with these statements or determine if they are “really” true or “really” false.

It doesn’t matter. There may be some truth in them, just as there is some truth in lots of alternative perspectives. You are not choosing “The One” that is true as if the others must be false. At this stage you are simply expanding the range of ways you can look at this situation by creating a universe of possibilities that are also true. Too often we take the historical experience and make it into “the way I am” or “the way IT is” whatever that situation is. As if we were powerless to have it any other way.

Here are some examples. No doubt you can think of a dozen more easily from your own life or from what you have heard clients say.

- >> *“Everybody knows that, if you work in corporations, you have to be a team player. You have to sacrifice yourself for the good of the team.”*
- >> *“I’m just no good at selling myself.”*
- >> *“Either you’re committed to your career or you’re committed to being in a relationship. You can’t have both, successfully.”*
- >> *“It’s hopeless. Everybody knows how hard it is for women over 30 to find a husband. You’ve seen the statistics. There was even an article in Time magazine about it.”*
- >> *“It’s scary to ask for money.”*
- >> *“I’m a freelance designer. I can’t turn down work — not from my best clients.”*

>> *“Really, you have no idea what it’s like to be a single parent. With my schedule I just can’t get in the exercise I need to be really healthy...”*

As coaches, part of our job is to tune our ear to these absolute statements and recognize that they are merely one way of looking at the situation. There are other ways of looking which are also true; it’s just that often the client has an automatic response. The goal of the coaching at this early stage is to hear the default perspective and be curious about it. “What is it like, client, to look at your situation from that point of view?” Really stay in this question for a while so that clients have a deeper experience of this automatic perspective; they are actually awake to the way they look at this part of their lives rather than asleep. Explore the territory here: What does it get you? What’s the payoff? What’s the cost?

Then look for other alternatives that are also true. These last four words are important. As coach you are looking for alternative perspectives that are also true for that client. Otherwise the client will play along with your game, and be holding the final trump card — that the perspective they are in is the true one, all these others are a mind game.

Here are some tips for working with perspectives with clients:

1. Tune your own ear to listen for underlying assumptions that you go along with as if they are the truth — maybe they are beliefs you hold too, but your job is to test those underlying assumptions and be curious. For example, when your client says, “working full time and going to school nights, volunteering on Sundays...I’m overwhelmed.” Out of sympathy for their busy life you might just nod right along with this assessment — “yeah, it really is overwhelming.” If you buy into this perspective then all of the coaching and all of the resulting action comes out of a perspective called “I’m overwhelmed.” What would another perspective be that is also true? How about something like: “I’m living my fulfilling life, today.”
2. It’s not enough to come up with only one other alternative. That becomes an “either/or” game — a very limited assortment of choices. Look for a number of alternative perspectives. One tool you can use is the wheel divided into eight segments. It’s an easy graphic way of expanding perspectives and keeping track of them with the client. Note that you are not required to find eight every time.
3. Looking for perspectives is not about finding the “Pollyanna” perspective, the one where the client now feels good about his or her life or situation. Your job is not to make the client feel better but to have the client explore his or her experience and expand the ways of looking at it. You might ask your client for a perspective on the situation from his or her Future Self...or in contrast, what is your Saboteur’s perspective on this situation?...Or, who is an important person who has great wisdom; what perspective would that person give you? What’s the perspective of a six year old? These are all ways to look at the same circumstances from different points of view.

THE POWER OF CHOICE

Far too often people believe they don't have the power of choice; it's the circumstances of their life that control the outcome. It's the job, it's the traveling for work, it's the limited income, it's the responsibilities of parenting, it's the lack of free time, it's...boy the list goes on. Look at all the circumstances! And when we do it often feels like we are powerless to choose differently or to change. Our vision is narrowed and narrowed until we are so driven by the circumstances that we no longer see what is possible.

A variation on this is the *Consequence of the Big Decision*, which renders all other action without choice. As in, "I chose to be married so..." or "I said I would take this volunteer position, so..." or "I wanted this promotion so..." It's as if we gave up the power for any more choice when we made the Big Choice. Now we have to live up to the consequences. The truth is, there is no such thing as "have to". There is only choice. We are not victims of our circumstances or our history or our judgments of ourselves. We can choose differently, or we can own the choice in what we have without changing it.

Consciously choosing seems so obvious, and yet it is so necessary. In order to have the life they want, clients must choose and must know they have chosen. It's about living life consciously. Choice has action in it — at least an internal kind of action; there is movement inside when a choice is made, just before there is movement in the outer world. Choose to go out to eat tonight, and notice that there is an internal shift before you ever get out of your chair or check where you left the car keys.

As coach, one of your jobs will be to help clients make choices, and bring value to that process by looking with clients at the perspective they are in about choosing. It's like being at the beach. Some people watch others for a while, checking out the scene. Some analyze the depth of water, the water temperature, and the air temperature. Some wade in part way and splash. Some only sit on the sand and never go in. Some run, leap, and dive in with eyes closed, pinching their nose. All different perspectives on choosing.

PLANNING

Once the client has chosen a perspective it is time to explore what can be done in that area to move in the desired direction. Planning takes many forms. The Balance course will introduce you to a simple, effective method of planning. In *Section 2: Resources & Tools* of this Balance course manual, you will find resources and tools introducing other planning methods.

OVER-OPERATIONAL PLANNING SYNDROME: OOPS

Action and motivation complement and support each other. Being in action is motivating and the motivation stimulates the urge for action. This creates powerful momentum in the client's life. Having chosen an exciting and resourceful perspective, clients may start to pile on the action. Everything looks so enticing that our client tries to do it all. Too much action and our client's motivation and effectiveness nosedive like an airplane that climbs at an angle that is too steep to maintain. The role of the coach here is to be aware of the effect and let our Level 3 awareness inform us when it is time to trim the wings. We do this with a most effective process called "saying no."

YES...AND NO

Clients want a really full life and we want that for them. As coaches we are a huge YES for our clients. Especially a “yes” to their most fulfilling life and a balance that works for them. The key here once again is choice. To choose to say “yes” often means that there is an accompanying “no” to be voiced as well. If the client is saying “yes” to more family time, there may be a whole series of “nos” that are inextricably linked, such as, “no” to working late or weekends, or “no” to other outside activities, or friends, or business associations. There will be specific, detail level “yes’s” and “no’s,” along the lines of “saying yes to going dancing once a week” and “saying no to snacks in the evening.” There will also be broader, bigger “yes’s” and “no’s,” along the lines of “saying yes to taking a stand for myself” and “saying NO to my Saboteur’s opinion.” One of the most effective exercises you can offer clients is the assignment to make two lists: “What are you saying ‘yes’ to?” and “What are you saying ‘no’ to?” It is a request and inquiry that you can use many times in different situations with the same client, because the exercise focuses directly on the power of choice in the clearest possible way.

COMMITMENT

While the list of “yes’s” and “no’s” is a powerful thing, it’s still just a list. It is too easy for people to feel that the work is done when the planning and thinking are done. Unfortunately, the action plan at this stage is just words. It is in the realm of “good ideas.” Without real commitment, the action plan could continue to be really good creative ideas and inspiration for a very long time.

The act of committing moves everything to a deeper, more motivated level. To step into commitment is to cross a threshold, a line in the sand. On “this” side of the line, the plans and aspirations are good ideas; on “that” side of the line is commitment to make them real. Clients know how committed they are, all you have to do is ask: “Client, on a scale of one to 10, how committed are you to this plan?” If they say less than 10, you can ask: “What will it take to bring your commitment up to a 10?” If they say they’re committed at a 10, you can challenge them to another level: “What would bring your commitment to a 15?” Crossing the line is a powerful experience — not just a metaphor — so feel free to have your clients actually, literally, physically, see the line they are about to cross...take note of what is on the other side of the line and what is on this side, and choose which side they want to be on...and when they’re ready, take the step, or leap, or shimmy, whatever it is that puts their bodies on and over the line.

THE ACTION OF COACHING

Coaching is a powerful medium for change; that's absolutely true. What can get in the coach's way is getting too caught up in their own Level 1 experience of being a coach, so the coach starts to think they are responsible for the client's action. In that scenario, the coaching session is where the action and work of coaching happens and the measure of the effectiveness or impact of coaching is the measure of what happens in the coaching session itself, especially how the coach performed. Actually that is not true and will only get the coach in trouble. Clients are 100% responsible for their lives, and they are 100% responsible for the action of their lives. The real action of coaching happens in between the coaching sessions, in the client's life. The measure of the effectiveness or value of coaching is what clients do the other six days and 23 plus hours. This can be a great relief for some coaches who think it's their job to pull the wagon up the hill with the client in it. What makes this especially counterproductive is that when coaches take too much responsibility, clients often defer, are actually disempowered, and coaches end up working harder. If you are overly responsible or overly attached to being a powerful influence on the client's life, you are actually sending the message that the client is small, weak, and dependent on you, rather than creative, resourceful, whole, and magnificent, and completely capable of creating the life that works for him or her every day of the week.

Where you do have an important role is making sure that there is an accountability loop of some kind. One of the inherent strengths of coaching is this accountability structure for clients. What works is being clear with clients, exactly what it is that they are going to be accountable for — so that you both understand the measure of what will happen. You can give clients wide latitude for determining how they will know they have completed the accountability, but the accountability itself should be clear and specific. For example, you might make this request to a client: "My request is that you take a stand for yourself at least once each day." Or "My request is that you notice when you are intense 10 times every day. How will you know that?"

If you give clients an inquiry, make sure there is a way to really keep it alive during the week. Will they write in a journal? Talk to a friend? Post the inquiry on the refrigerator? Take the inquiry for a walk with the dogs? And then follow up the following week on the accountability that you and your client agreed to. Otherwise, you run the risk of sending the message that accountability isn't that important, in fact, that the task itself wasn't important enough to follow up.

Section 2

Resources & Tools

INTRODUCTION TO RESOURCES & TOOLS

These resources and tools are provided to support you in getting started. Use these tools as they are or feel free to adapt them as needed. These are copyrighted resources and you have the permission to reproduce them for use with your clients. Duplication for any other purpose is a violation of copyright law.

You will find electronic copies of many of these forms on the Course Materials web page for your convenience.

BRAINSTORMING PERSPECTIVES

Helping your client identify and try on other perspectives is a critical piece of the balance formula. While it is acceptable to simply ask the question: “What’s another perspective?” often coach and client run out of ideas after four perspectives. By selecting a metaphor, you and your client now have a large playing field to explore and the coaching interaction is often richer.

For example, you have a client who is in the perspective of “this current project at work is doomed.” You choose as a metaphor an auto mall (you know one of those places that has many dealerships all in one place). You would then ask your client to name various cars as the perspective, and then explore how they relate to the original topic. His current perspective could be the Edsel perspective. You might ask about the Ferrari perspective, the Ford Taurus perspective, the Corvette perspective, and so on.

One note of caution: When using metaphors it can be easy for you and the client to get lost, forgetting the original topic. Remember using metaphor in the way we have suggested is a simple way to engage the client’s creativity and open up new pathways.

It is your job as coach to keep reminding the client what the original topic is about.

Using our example you would remind the client that there are some other perspectives on the current project at work.

As you get to know your clients pull ideas from what you know they enjoy. For example, flowers for the client who loves gardening.

Here are some ideas of metaphors to explore with your clients:

- >> A buffet table — using various foods.
- >> A garden — using flowers and trees.
- >> A shopping spree — using clothing.
- >> Art museum — various paintings and sculptures.
- >> Music — songs or artists.
- >> Sports — various sports (baseball, basketball, soccer), or positions on a team (first baseman, shortstop, pitcher), or teams (Giants, Cubs, Blue Jays).
- >> Zoo — perspectives of the different animals.
- >> House — kitchen, living room, bedroom.
- >> People — famous or people known to the client (your Aunt, mom, boss).

The relationship between coach and client exists in space and time. Even in telephone coaching there is definitely an environment created in which the coaching occurs. This environment has many qualities that we call the Geography.

If you recall Geography from your school days, it consists of things like the physical characteristics, the geology below the surface, the weather above, the natural resources of the region, the products, the culture and language and more. As coach and client we actually create geography even when we are unconscious of what we create.

Here's an example from life to illustrate geography in a different setting. There is a geography of a wedding. There is a particular physical environment that includes a certain expected form of dress, music, ritual, special language, movement, all designed to create a particular experience...a geography of a wedding. There is a tone, an undercurrent of experience that is created. You might call it a climate. In the same way there is a geography for a pro wrestling match, which would be quite different from the geography you would find at a performance of a Verdi opera. Being conscious of geography makes coaching enormously more effective.

The Geography of Balance Coaching

Any time our clients really change their perspective we will notice a shift in geography. Geography is the energetic and emotional field of the session as well as the physicality of the client. We call it geography because experiencing and exploring it is like the study of geography. We discover this land with our clients.

By attending at Levels 2 and 3 we can notice the geography of our client's initial perspective and then notice how the geography shifts when our client shifts perspectives. Physically the client's posture or way of moving may change. We may notice a more spacious or tight feeling. We may notice a difference in energy level or temperature. We may sense an emotional shift. We may also notice if our client has moved to a new perspective and the geography stays the same.

Here's an example. Our client is unhappy with her job. Her first perspective is "I'm stuck in a dead-end job and I'll never get out." The geography is dead, dreary, anxiety filled, hopeless, defeated. It feels like a smelly swamp whose main export is dead and rotting plants and animals. Her physical energy is low and her body is tight and closed. You move her to the "open prairie" perspective about her job and as she talks your Level 2 and 3 awareness notices that the client's geography hasn't changed. Her words have changed but both the emotional, energetic field and her physical presence are exactly the same. You know that your client has not changed perspectives. At this point you can encourage her to more deeply embody "open prairie." Or you can say out loud, "I notice this feels a lot like your original perspective. Let's go back there and experience it more deeply" and return her to the original perspective before moving again. You can try another perspective entirely and see if that one will break the spell. If there has not been a shift do not keep coaching as if your client has really shifted perspectives. If the client does not truly shift her perspective Balance coaching will become a meaningless game.

Noticing and playing with geography will make your Balance coaching more powerful, fun and effective. You will have opportunities to explore geography more fully in Process and In The Bones.

FIVE WAYS TO GET PHYSICAL WITH YOUR CLIENT...

AND CHANGE THE GEOGRAPHY OF THE COACHING SESSION

Assume the Position

If your client is trapped in negative conversation or a limiting belief, try having them give that conversation a persona.

>> Ask: What is the name of that persona? How would he or she sit? Walk? Talk? Dress?

Have the client step into the body of that persona and act it out. Have them exaggerate the experience. Then ask the client to make whatever changes they wish to feel more at ease and alive in their body.

>> Ask: What do you see from this new perspective?

Change Body Position

When the coaching feels like it is getting bogged down or hard, change your body position and request the client do the same. If you are sitting in a chair, get up and look out the window. If you are walking around, sit down with both feet on the floor. Stand on a chair, lay on the floor, crawl around...the possibilities are endless.

Examine the Situation From a Variety of Angles

Have your client draw or symbolize a goal and stick it on a wall somewhere. Then have the client move around it playing with distances and angles — close-up, super close-up, and as far away as possible. Have your client move towards it fast, move away from it slowly, move towards it with their eyes closed, etc.

Ask the client to note what comes up for them emotionally as they experience the different angles. Do they get feelings of comfort? Sadness? Joy? Ambivalence? What new information does this give them about their goal?

Spell It Out With Your Body

Have your client use his body to express every word he is saying. Think charades, only he may use the words as he goes. This has a very powerful impact on the client's ability to own what he is saying.

Let Your Feet Do the Talking

Have your client take off her shoes and go outside and stand barefoot in the grass (or on the carpet). Ask her to really scrunch her toes down in the grass and wiggle her feet around. What information does she pick up with her feet?

In the Balance course we introduce a three-step planning method. This process can take anywhere from a few minutes to several coaching sessions.

The three steps are:

1. Brainstorming possible actions
2. Narrowing it down.
3. Creating specific, timed actions.

Brainstorming Possible Actions

Planning starts when the client has chosen and lived into a perspective. As coach your role is to notice at Levels 2 and 3 if your client is fully in the perspective and ready to move forward. If they are, start exploring possibilities of things they could do or be. At this point we want free rein for all possibilities, even ones that seem odd or impossible. We are opening up the realm of possible actions from their chosen perspective. This will usually feel easy and flowing. The being and doing possibilities should feel alive. If not, it's possible that you need to explore perspectives more fully or be sure the client has deeply inhabited their chosen perspective.

Narrowing It Down

Once you have a list of possible actions it is time to narrow it down. You want the client to have a list that they are excited to begin. You want those actions to be the most effective. You want them to be able to fit it into their lives.

To do this we use the tool of yes's and no's. What are the actions they will say yes to? What in their life will they say no to so that their yes's can really happen? As coaches, we have to take a strong stand for our clients' fulfilling lives. We don't want to trim their list down to a mundane to-do list. We want them to choose the yes's and no's that will create the steps to a wildly fulfilling life.

Creating Specific, Timed Actions

Now it is time to have these actions show up in your clients' lives. This is the time where the client puts their actions into their schedule at specific times on specific dates. Without this step our client is only exploring good ideas. As coaches, we are very conscious of holding our clients' magnificent lives as they create the structures by which those lives will be created.



Planning Resources

1. *Mind Map* — There are several books on the subject. Here are two suggestions:
 - >> *Use Both Sides of your Brain*, by Tony Buzan
 - >> *Mind Mapping*, by Joyce Wycoff
2. *Fish Bone Technique* — We have enclosed a fish bone for you to photocopy and use with your clients (see *Section 2: Resources & Tools*).
3. *Outline* — Do not underestimate this old stand-by.
4. *Vision Diagram* — We have enclosed a sample page to copy and use with your clients (see *Section 2: Resources & Tools*).

GOAL SETTING THE CTI WAY

In the Fulfillment course, you learned that clients live into their Big “A” Agendas by setting goals and following through. We also introduced you to the concept of “SMART goals,” as framed by CTI. Here’s a quick review. Note that the meaning of the letters “ART” is unique to Co-active® Coaching.

S = Specific. In order for a goal to be achievable, it needs to be specific. What exactly does your client want to accomplish?

M = Measurable. A goal must be measurable and have a date attached to it; otherwise, how can your client know they’ve accomplished it?

A = Accountable: In moving toward a goal, it is useful for your client to have you, their coach, holding them accountable for achieving it.

R = Resonant: Resonant goals are what move clients toward their Big A Agenda, or who they are becoming. Is this goal something your client truly desires? Will working to achieve it take them toward the resonance of fully honoring their values? It’s part of our job as coaches to help clients find the resonance in their goals — or let them go.

T = Thrilling: Goals should be 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.

STRATEGIC PLANNING CHECKLIST

A Strategic Planning Checklist is a structure used by clients to plan weekly activities. Clients review the checklist during a time they set aside to plan their week.

We have included a blank form to use with clients (see *Section 2: Resources & Tools*).

These items are to be evaluated for action on a weekly basis.

- >> When will I exercise this week?
- >> What people/relationships need attention this week?
- >> What special dates do I want to plan for (birthdays, anniversaries, etc.)?
- >> In what areas am I out of balance? What will I do about it?
- >> What is one thing from my “beat procrastination” list that I will complete this week?
- >> How will I honor my value of _____ this week?

STRUCTURES

Structures are devices that remind clients of their vision, goals, purpose, or actions that they need to take immediately. Here are some examples of structures to use with clients. Remember that the most effective structures for clients are often structures they design for themselves.

Clocks/Timers/Alarms

Can be used to remind the client it is time to do something, for example: take a breath, leave for an appointment, acknowledge someone, get ready for bed.

Clothes/Clothing Accessories/Jewelry

Scarves, ties, suits, shirts, socks, rings, necklaces, bracelets, earrings, watches all can remind clients to be any number of things: playful, sensual, flirtatious, powerful, forgiving, elegant, warm...there are endless possibilities.

Wearing socks that don't match for two weeks to remind the client that she or he gets to decide for herself or himself.

Jewelry that is worn on a daily basis, such as a wedding ring or watch can be moved to a different wrist or finger as a very present reminder of a homework assignment.

Computers

Most computers will allow the client to customize a screensaver. The client may want to use affirmations or beautiful scenery to remind them of a compelling goal or vision.

Computers also have alarms and can be used to remind the client to stop working.

Post Cards

Clients can address postcards to themselves to remind them of an accomplishment, a dream, a deadline, or a goal.

Stones/Pebbles

Two bowls with stones...moving a stone from one to the other can signify lots of things, for example, from worrying to not worrying

Put a stone, coin, etc., in your pocket to keep something in focus all day.

Writing your values on stones, and drawing one for the day can help remind clients to more fully honor their values.

Post-it Notes

Affirmations or powerful phrases placed on the refrigerator or the bathroom mirror can help the client remember something all week.



Collages

These are often effective in capturing and deepening a client's vision.

Music

Playing a favorite CD in the morning to set the tone for the day.

Change the words to a song to be about a goal/plan, and sing it every morning in the shower or car.

Voicemail

Leaving a message on your own voicemail as a reminder of something or to acknowledge your progress.

Journals

Keep a gratitude journal.

Write successes each evening.

Miscellaneous

Put the car keys in the refrigerator in order to remember to take lunch to work.

Put keepsakes on your desk to remind you of exciting projects you have. For example a travel brochure for a trip you plan to take.

Create an archive of old beliefs.

Fresh flowers can be a structure to bring beauty into your home.

Develop this sort of strategy around a structure that makes follow-through a sure thing.

WALK THE TALK

Walk the Talk is a structure for a client that keeps him or her in action, creating balanced and fulfilled lives. It is a checklist of items developed by the client. These items are things that will absolutely change the quality of the client's life. These items can be projects or things the client has been procrastinating about, avoiding, and/or wanting to take on. These items can also reflect quality-of-life shifts or practices that the client wants to make a regular part of his or her lifestyle.

Walk the Talk is a combination of Doing (projects) and Being (quality of life shifts) items (please see the sample on the following pages). The projects are finite, they have a beginning, middle and end, and there is a sense of completion as each of the items is integrated into the client's life.

There is great flexibility in how your clients design a Walk the Talk program for themselves. As coach, there are questions you can ask that will direct clients in creating their Walk the Talk lists.

Project focused questions:

- >> What things, if you did them, would change your life?
- >> What are you truly longing to take on?
- >> What would give you joy once you complete it?

Quality-of-life shifts:

- >> What practices do you want to make a regular part of your life?
- >> What is the quality-of-life shift that you are committed to?
- >> What do you long for?

Clients may want to set up different categories such as personal growth, relationships, and business. They may want to set up business related categories such as office organization, marketing, client relationships, etc. Others may want to design one long checklist.

While there is no 'right' number of items for a Walk the Talk list, it is more effective to have a minimum of 30. Encourage your client to take breaks while designing his or her Walk the Talk structure.

As coach, you will ask your client to report on his or her progress. The report is simply stating the number of the items completed over the total number of items on the checklist. Example: A total of 50 Walk the Talk items. Client has completed 15. The statistic would be 15 over 50.

See the sample Walk the Talk checklist on the following pages.

A blank Walk the Talk form can be found in *Section 2: Resources & Tools*.

SAMPLE: WALK THE TALK

Health

1. I have made regular aerobic exercise a part of my life as opposed to something “I have to do.”
2. I have joined a health club.
3. I choose low-fat food consistently.
4. I drink eight glasses of water a day.
5. I weigh 140 pounds and feel great.

Significant Other/Romance

1. My partner and I have created a five-year vision for our relationship.
2. I have scheduled four romantic weekends this year at B&B's in California.
3. I speak my honest feelings in the moment.
4. I no longer use blame as a way to justify myself with my partner.

Environment

1. Each room in my home reflects beauty and something magical.
2. My office is clean and organized.
3. Paper piles are off the floor of my office by 6pm daily.
4. Photographs of people I love surround me.
5. I have organized all of the closets in my house.

Money

1. Taxes are ready by February 15th.
2. My credit card debt is no higher than \$1,000.
3. I come from abundance.
4. Quicken is set up to track expenses.
5. I have \$8,000 in my business savings account for emergencies.



Personal Growth/Spirituality

1. I attend one personal growth workshop per quarter.
2. I have joined a church/synagogue.
3. I have a coaching relationship that aligns with my spiritual beliefs.
4. I keep a gratitude journal daily.
5. I read one personal growth book every two months.

Fun and Recreation

1. I lead weekly hikes with my local hiking club.
2. I have learned to weave play in with my work.
3. I see a movie or a play once a month.
4. Relaxation no longer feels like something to be “worked into” my schedule.

Career

1. I have 26 clients whom I love working with.
2. I publish one article a year.
3. I publicly identify myself as a Life Coach.

Family and Friends

1. I have created a birthday calendar for all family and close friends.
2. I call my dad twice a month.
3. I tell the truth in my personal interactions.
4. I treat two nieces or nephews to a visit once a year.

SAMPLE: BALANCE WHEELS

Wheel 1

Question: Since the Fulfillment course I have...

- >> Transformed my coaching
- >> Been actively moving towards my future self
- >> Failed regularly
- >> Forgotten almost everything I know
- >> Been fully living my values
- >> Been stuck and confused
- >> Left jazzed, and life got in the way
- >> No — something else

Wheel 2

Question: Life is...

- >> A banquet of unlimited possibilities
- >> Dangerous. You have to watch your back
- >> An unfolding story. We are exactly where we're supposed to be
- >> A nightmare of hatred, disease, war and famine

Wheel 3

Question: In my homework last night...

- >> I thought I failed. The client got value
- >> Failed and celebrated
- >> Failed/suffering
- >> Didn't do it
- >> Client had a breakthrough
- >> I did the hard thing
- >> Client wants more
- >> Coaching is easy/I can do it

THE BALANCE FORMULA AT A GLANCE

Perspective

- >> Get clear what the coaching is about. What is the topic?
- >> Have the client be aware they are in a perspective and explore and embody it.
- >> Explore and inhabit other perspectives (you can brainstorm perspectives and then inhabit them or come up with one at a time and inhabit them as they show up).

Choice

- >> Have the client choose the perspective they will create from and inhabit it.

Plan (this is one of many ways to plan)

- >> From the chosen perspective, brainstorm possible being and doing actions.
- >> Narrow the possibilities list to a doable and empowering plan using yes's and no's.
- >> Create specific items and times to put them into action. Create structures to keep them alive.

Commitment

- >> Have the client step over a line and declare what they will commit to.

Action

- >> Action takes place outside the session with an accountability structure supporting it.

10 DAILY HABITS

For the Month of _____

Instructions: Write your 10 daily habits in the space provided. Each day, color in the box for that day and that habit to track your progress. The objective is to fill in all the boxes during the month. Choose how many days per week you will practice these habits — 5 or 7.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
HABIT																														
1.																														
2.																														
3.																														
4.																														
5.																														
6.																														
7.																														
8.																														
9.																														
10.																														

WALK THE TALK

Health

1. _____
2. _____
3. _____
4. _____
5. _____

Personal Growth/Spirituality

1. _____
2. _____
3. _____
4. _____
5. _____

Career

1. _____
2. _____
3. _____
4. _____
5. _____

Finances

1. _____
2. _____
3. _____
4. _____
5. _____

Significant Other/Romance

1. _____
2. _____
3. _____
4. _____
5. _____

Environment

1. _____
2. _____
3. _____
4. _____
5. _____

Friends and Family

1. _____
2. _____
3. _____
4. _____
5. _____

Fun and Recreation

1. _____
2. _____
3. _____
4. _____
5. _____

STRATEGIC PLANNING CHECKLIST

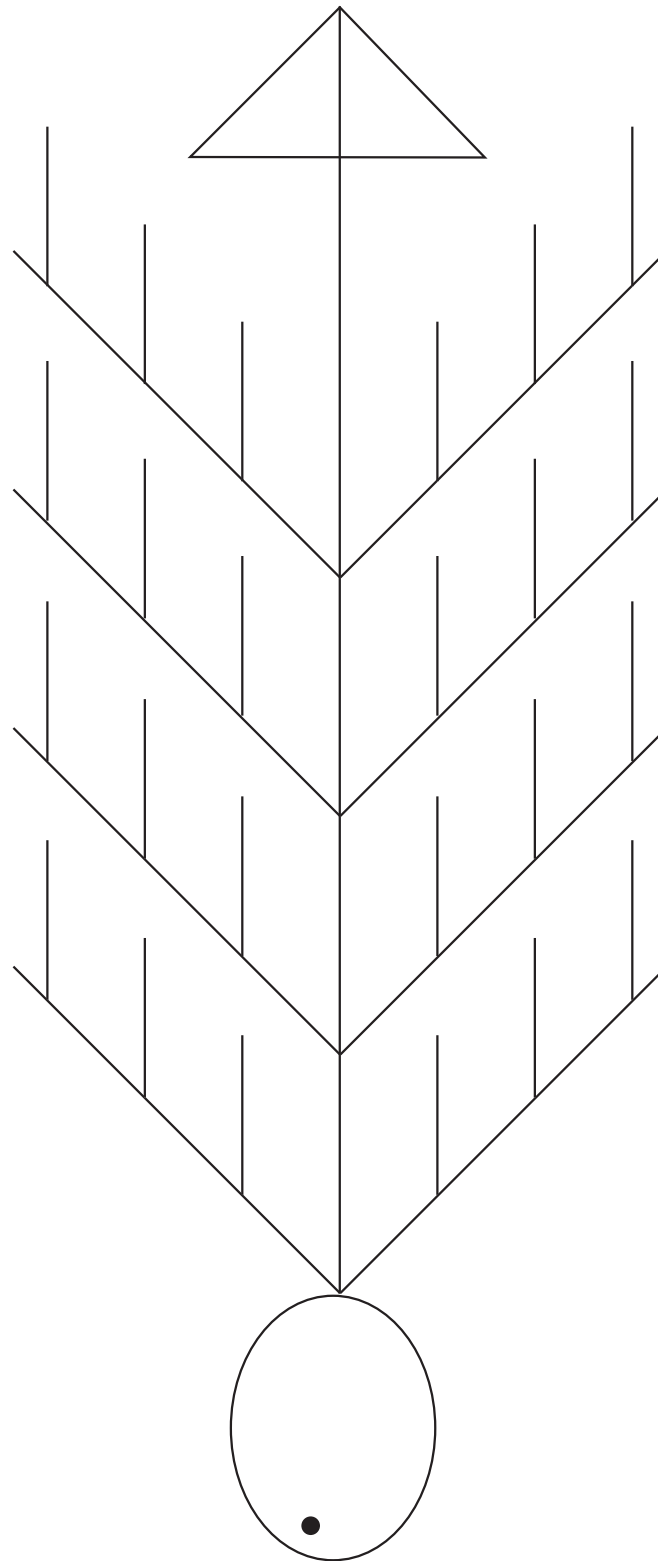
These items are to be evaluated for action on a weekly basis:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

COMPLETION LIST

Item to Complete	Do By	Done
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		

FISH BONE



VISION DIAGRAM

