The Importance of Co-Creating the Coaching Relationship with Ours Client

1. Emphasizes client autonomy.
2. Makes the client an equal partner in the designed alliance as well as session structure.
3. The client owns the content; the coach owns the process.
4. Agreements are collaboratively created and mutually agreed-upon.
5. Puts the client in charge of his or her successes and failures.
6. Creates client buy-in and ownership of his or her action plan
7. Activates our trust networks in the brain (the oxytocin effect)
8. Increases our ability to empathize
9. Increases the perception of being seen, heard, and appreciated
10. Increases a sense of safety/allays any threat/fear response (i.e. being judged, experiencing shame, the fight or flight response).
11. With increased safety, empathy, and trust, both coach and client can 'lean into' the relationship more and more (take risks, swing out, trust more).
12. Sets the foundation for the client to do 'the work'
13. Takes the coach 'off the hook' for having to know what is best for the client and having all the answers - while facilitating trust in the client and trust in the process.

Coaching Session Structure & Milestones

Being Coach **Comes 1st**

Connect with the Coaching Mindset

- Connect with your awareness that this client is a hero on their journey – naturally creative resourceful and whole
- notice any judgment or distraction
- Center yourself
- have you want to begin by being over there with the client and empathy and following the energy

Doing **Comes Next: by using the Structure** (Without a structure you don't have a game plan - the coach ends up doing all the work)

1. **Connect with the Client** (Establish rapport - Affirm the Alliance)
   - A warm welcome
   - Connect with the Client's Energy - What do you notice about the client's energy?
   - Does the client need a moment to get centered or to vent?
     - Reflect what you're noticing
     - Explore what would be helpful
   - Quick check in on anything special the client would like to share

2. **The Accountability Check-in** (Forward the Action/Deepen the Learning)
   1. Transition into exploration of how the client did with their commitment to action from the last session.

   EXAMPLES:

   "Let's begin with the check-in. "How did you do with what you committed to do the last time we met?"

   "I see from your Coaching Prep Form that you (summarize wins, as appropriate). What are you taking away from those wins? (Acknowledge your client). I see that there are some things you didn't get to. What can we learn from your experience? (Acknowledge your client's awareness and learning)

   - Begin by identifying WINs (if this is a client who usually has WINs)
   - Identify what the client committed to do but did not
   - Explore what awareness or learning (i.e. 'trial and learn') they are taking away
   - Summarizing wins and learning is an effective way to conclude the check-in

***Create the Session Agreement** – If you don't know where you're going, any path will get you there!*

Find the <u>Focus</u> of Today's Coaching:

EXAMPLES

- "What would you like coaching around today?"
- "What would you like to focus on today?"
- "What would be most valuable for us to focus on today?"

- Keep clarifying until both you and your client a really clear on the client's intention for the coaching (reflection, request for clarification, summarizing)
- When the client doesn't know:
    - "Let's identify a couple of choices"
    - "Let's pretend that you do know what it would be - what do you see?"
    - "Take a minute. (Silence) What is your gut telling you?"
- When there is more than one topic:

a. Reflect the topics and asked the client to choose which one is most important right now

4. **Identify the Client's Desired <u>Outcome</u>** - Orient the client towards their destination rather than the problem - Coaching is taking people from their current reality to the desired.

"Begin with the end in mind"

Steven Covey

EXAMPLES:

- "What would be a good outcome for you today?"
- "What would you like to accomplish today?"
- "What would be the best outcome for today's session?"

A client might like to:

- Get clear on something
- Make a plan
- Make a decision
- Figure out what to do differently
- Strategize around an obstacle
- Brainstorm ideas because they feel stuck

- Clarify until you both are clear on the vision for the call
- When the client's desired outcome is perhaps too big:
    - Reflect the stated outcome, name that it sounds really big and explore how you could together chunk it down
- When there may not be enough time to get to the desired outcome:
    - Name it, asked permission to explore as much as you can together and identify how the client will continue the exploration (i.e. "we may not have enough time to arrive at (the outcome) you would like to in this session. Would it be okay with you to explore it as far as we can, and if we don't get all the way there, explore what the next steps are to get there?")

- When the client is not clear
    - Explore what they would like to work on it in relation to the session focus

5. **Identify how the client will know they are successful (<u>Measurement</u>)** Clients come to coaching to make progress

   EXAMPLES:

   - "Let's begin by calibrating a little bit. On a scale of 1 to 10, where are you now? Where would you like it to be?"
   - "How will know at the end of the session that we accomplished what you want to?"
   - "How will you know that we've arrived at that outcome?"
   - "How will you know that your outcome is achieved at the end of the session?"
   - "Where are you now and ideally where would you like to be at the end of the session?"
   - "How (clear, aware, etc.) are you right now and how (clear, aware, etc.) do you want to be? On a scale of 1 to 10 what is 10 is and what is 1?"

- Measurements can be very specific (i.e having a plan or strategy)
- Measurements can be soft (i.e. feeling better or clearer)

6. **Identify the relevance or importance of this outcome (<u>Meaning</u>)** This helps to connect the client to their vision &/or values and their motivation!

EXAMPLES:

- "What is it about this outcome that has a special meaning or importance for you?"
- "Why is this important to you now? What do you want to create instead?"
- "What are you noticing about the current situation? What would be available to you when you shift it?"
- "What about that is valuable and important to you? How would your life be different if/once…?

- If the client is stuck, help them connect with their vision or values may have shared with you
- If there's no energy and the stated importance, name that and explore more - what would the outcome give them? What would be available? What would be different? What outcome would be more meaningful?

Explore the Client's Agenda

7. **Identify the Current State - begin where the client is –** help the client define what the client believes he / she needs to address or resolve in order to achieve what s/he wants to accomplish in the session. This is an opportunity for clients to identify and explore challenges that they are facing.

EXAMPLES:

- "What are you noticing about the current situation?"
- What is the challenge or obstacle that is facing you right now?
- "Say more about what is happening right now."
- "How might you like to go about exploring X?"

8. **Explore the Desired Experience/State**

EXAMPLES:

- "What's the experience that you would rather have?"
- "What is the outcome we are working towards?"
- "What would be available to you if you shift X?"

9. **Explore the path from where the client is to where they would like to be**

EXAMPLES:

- "Have you experienced a challenge like this in the past, where you were successful?"
- "What would be most helpful to explore this challenge?"
- "What would be the best way to address this situation?"
- "What resources might be available to you to help you through this?"
- "What is needed right now?"

10. **Continue the Conversation and follow the client's lead -**Remember to partner with the client. The client owns the content & the coach owns the process.

    - Do not rush to solutions
    - Follow the energy – focus on where it is strong (i.e. "I notice that when you talk about X your voice gets brighter. What's goes on for you when you speak about it?")
    - Ask permission to share an intuitive hit – explore what they make of it -Use non-attachment – tell them to discard if not true or relevant (i.e. "As you shared what you are noticing, I had an intuition. May I share it with you?")
    - Ask permission to switch hats, as appropriate (Scope of Practice). Clarify when you are switching to your expert hat and when you are switching back to your coach hat (i.e. "May I switch hats and share some education around this topic with you? I am switching to my expert hat right now……. I'm switching back to my coach hat now.")
    - Use reflection - Play it back. (See *Types of Reflections* below)
    - Use active listening more and questions less
    - Help the client formulate their own learning
      - "What are you seeing so far?"
      - "What are you noticing?"

- "What are you learning about yourself?"
- "What insights are you getting?"

When client education seems appropriate: (Also See *Making Suggestions - Giving Advice – Providing Education or Information* below)

- o Explore what the client knows
- o Explore what the client would like to know or where the knowledge/information gap is
- o Explore how the client would like to get that information
- o If from you – give one piece of information at a time; confirm that the client understands and that it is useful. If yes, explore how they can use the information

Next Steps & Wrap up

8. Explore whether the client's intention/desired outcome was reached

EXAMPLES:

- ➢ "Did we arrive at where you wanted to today?"
- ➢ "Did we address your intention for today?"
- ➢ "You described being at (number) on a scale of 1 to 10 we began. Where are you now?"
- ➢ "We didn't completely arrive at the outcome you had hoped to. How would you like to continue this exploration?"

- o Sometimes we don't get to the outcome and that's okay. Explore how they can continue the exploration (i.e. on their own as an action step or in the next session)

9. Explore the client's commitment to action - help the client design specific action they feel motivated and committed to take

EXAMPLES:

- ➢ "What is one action step you might take?"
- ➢ "What would you like to commit to do between now and the next time we meet?"

- o Help the client to identify SMART action steps
- o Challenge action steps that seem to be too big or unrealistic or less than what the client is capable of doing
- o If the commitment to action is soft (i.e. developing awareness, observing triggers) ask how they will know they are successful.

10. Explore what resources (Support) they need to move forward

EXAMPLES:

- ➢ "What will support you in moving forward?"
- ➢ "What is needed to support you in meeting their goal?"
- ➢ "Who can support you with this?"
- ➢ "What kind of resources might be helpful to you right now?"

- o Support can come in the form of:
  - People (i.e. Friends, family, colleagues, exercise buddies)

- Support mechanisms (i.e. tracking, journaling, apps, structures)
- Other resources (i.e. research, educational, medical or another source)
- A referral (i.e., medical, counselling, nutritional, etc.)

11. Explore Accountability

EXAMPLES:

- “What accountability if any would you like?”
- “Tell me how you will be accountable for yourself?”
- “How would you be accountable to yourself?”

- There are 3 sources of accountability:
  - Self
  - Someone else
  - Coach – may be the choice especially in the beginning
- It is important to help the client develop a sense of accountability-to-self. They will need that once the coaching ends and they are on their own
- Accountability-to-self may include using tracking tools (i.e. tracking apps, wall calendar, reminders (iPhone), using structures, journaling)

12. Explore the client’s *Takeaway* from the session

EXAMPLES:

- “Tell me what your take-away from today is?”
- “Tell me what you’re learning was today?”
- “What are you learning about yourself?”

- The Takeaway punctuates awareness for the client of what they’re learning and its application such as:
  - What they see now that they didn’t see before
  - What have they learned about themselves or something specifically relevant to their progress (i.e. new learning, what’s working and what’s not working, what they can apply from past experience, how they are in sync or out of sync with their values)
  - What new ideas they have come up with

13. Appreciate the Client

- Acknowledge the client in some way:
  - Their experience (i.e. a health challenge, a life challenge, the challenge of creating a new behavior and how they are standing up to meet it or willing to be with it)
  - Their character (i.e. courage, commitment to self/their best life/future self/vision, fortitude)
  - Their commitment to their future self
  - Being in sync with their values
  - Their progress (what they are learning and how they’re applying it or reaching their goals)

- sometimes is very effective to leave the client with an inquiry that punctuates and connects them more deeply to their future self/vision/values

Exploratory Tools/Strategies

Creating Awareness

- **Importance/Willingness Scale (1-10 Ruler):**
  1) Have the client identify on a scale of 1 to 10 "how important is it for you to__________?"
     Ranges: 7-10 = very important, 4-6 = somewhat important, 0-3 – not at all or very little (best to find another focus or goal)
  2) Explore Backwards: if the client selects the number between five and eight explore backwards. As the client why they selected a (numbered chosen) and not a (number below the number chosen - e.g., "Why did you select a 7 and not a 6?"). The importance of exploring backwards is giving the client the opportunity to explore whether the lower score is more accurate and to create awareness of how important it truly is.

- Explore, Affirm and Tie-in Strengths and Values to Action Steps and Goals
  1) Connect a value the client has identified to their action step
  2) Name and acknowledge a value or strength you see 'in action' whether the client is succeeding or learning.

- Explore Self-Love and Self-Care
  Use the *Self-Permission/Self-Denial Inventory* and explore items the client finds challenging.
  Use reflection to differentiate what the client says they want and what they are doing.

Breaking through Internal (and Sometimes External) Barriers

- Brainstorming
  1) This is about generating free, uncensored ideas – sometimes referred to as 'popcorn'. Allow thoughts to pop – all ideas are accepted. Don't worry about complete sentences – words or phrases are best. The intent is to generate creative and divergent thinking. Whereas identifying clearly thought out strategies originates from the cognitive part of the brain involved in logical thinking, analysis and evaluation (the prefrontal cortex), brainstorming actually draws upon a different area of the brain - one that taps into more creative, fluid thought – where 'aha' moments are generated.
  2) Identify with the client which ideas are most promising, acceptable or desirable and why.

- **Strategizing**
  This approach differs from brainstorming in that it is a more cognitive approach. The coach explores step-by-step with the client how they might actually go about taking action or arriving at a goal.

  1) Strategizing may be built upon exploration of:
     - Past successes & learning from failures
     - Changes made in the past that were difficult
     - How the change was made
       - What worked/what did not
       - What preparation was needed
       - What resources, skills, and strengths they draw upon
       - How the change was initiated and maintained
       - What the client attributes to their success
  2) Identify a process or method (e.g. taking small steps, where the client will begin) and making goals/actions steps manageable.
  3) Strategizing most often includes exploration of SMART (specific, measurable, attainable, relevant, and time-based) goals and action steps.
  4) Identify a method for evaluating the strategy or plan (e.g., tracking for evaluation plan.
  5) Explore resources that might be helpful (e.g., support, structures, referrals).

- **Reframing**
  Reframing creates the opportunity to see what the client has identified as an obstacle or a failure from a different perspective that may:

  1) Shifts how the client sees a barrier into an opportunity or simply minimizes the barrier.
  2) Opens the door to possibility thinking.
  3) Shifts a perceived failure into a successful learning experience.

- **Tapping into the Client's Vision, Future or Hypothetical Thinking**
  1) Pointing the client to their well life vision. If helpful asking them to imagine being there in describing it. For example, "imagine how your life will be when… "
  2) Helping the client to think about "what if" scenarios. For example: "suppose that…."
  3) Another method is to write a letter from the future (e.g., imagine that it's five years from now and you have succeeded with this change, describe how you made the change, what your life is like and any encouragement you'd like to give yourself from the future.)

- **Using an Experimental Approach**
  1) When establishing goals and action steps, co-create with your client that this is an experiment.
  2) When checking-in on goals and action steps, celebrate successes and turn (reframe) failure into learning success.
  3) Acknowledge your client for their willingness to try out different approaches.
  4) Take time to have your client identify what their learning and how they will apply the learning.

Balancing between Open-Ended Questions and Active Listening

It's important to balance open-ended questions with three key active listening skills:

1) Use **Open-ended** questions primarily
2) Use **acknowledgment** to Affirm (client strengths, efforts and resources)
3) Use **Reflective** listening (see below for a description of Reflective Listening skills)
4) Use **Summarizing:**
   - During the session as appropriate to identify a collection or list identified by the client (e.g., benefits, challenges, strengths, values, WINS identified in a check-in)
   - At the end of the session summarize what was discussed in the session (if time allows) and what the client has stated in their own words they will commit to action.

A good rule of thumb is to use active listening two to three times as much as open-ended questions. Use other active listening skills to create spaciousness and forward the coaching conversation:

1) Request for clarification to clarify a point or open the door for deeper exploration (e.g., say more).
2) Silence to create spaciousness for the impact of something to land or to give the client time to reflect.
3) Intuition to deepen the conversation or create an opening for a new thought.
4) Interruption and bottom lining to keep the client on track, to create awareness of the relevance (in the now) of the story or something that may sound unrelated.
5) Reflection a feeling. Recent research in the area of neuroscience points to the importance of naming feelings that arise within a client. When the file is named it tends to lose its efficacy and the client can move forward. When it is not identified and acknowledged, it has a tendency to consume the client's attention. It becomes the elephant in the room and takes up all the oxygen. When it is named it's like releasing the air from the balloon.

Types of Reflections

1. **Simple Reflection**: a paraphrase or restatement of what the client said

   EXAMPLE: Coach: "you're feeling frustrated."

2. **Complex Reflection**: a stronger emphasis on what the person has said or making a guess about the spoken content

   EXAMPLE:

   Client: "I'm feeling depressed today."

   Coach: "Something's happened since we last spoke. Your mood has been up and down recently, and you look like you don't have much energy."

3. **Amplified Reflection**: maximizes or minimizes what the client says by increasing or decreasing both the affect and the outcome

   EXAMPLE:

   Client: "I don't have time to buy or fix fresh vegetables. My family and friends down either."

   Coach: "I hear you saying that you don't know anyone who has time to buy or fix fresh vegetables and that it's impossible for you to fit eating fresh vegetables into your schedule."

4. **Double Sided Reflection**: two or more perspectives at the same time that encourage clients to look at different angles

   EXAMPLE:

   Client: "I don't have time to buy or fix fresh vegetables. My family and friends down either."

   Coach: "I hear you say that you don't have time to eat healthy and that is easier. But I also heard stated he is nowhere and he held a regular basis would be good for your health."

5. **Shifted Focus Reflection**: shifting from a resistance provoking topic to another one where there is less or no resistance

   EXAMPLE:

   Client: “I don’t have time to buy or fix fresh vegetables. My family and friends down either.”

   Coach: “Because you don’t have time to eat healthy let’s talk about the walking routine you did start.”

(**NOTE:** Definitions and examples of Simple Reflection, Amplified Reflection, Double-Sided Reflection and Shifted Focus Reflection are from Nurse Coaching. Definition and example of Complex Reflection is from Motivational Interviewing.)

Making Suggestions - Giving Advice – Providing Education or Information

Generally there are two conditions in which coaches may suggest, advise, educate or inform a client:

1. The client asks the coach for information or education
2. The coach feels that it may be useful

Coaching Response When the Client Asks the Coach

When the client elicits or asks for information from the coach, first take a moment to consider whether it is better to provide it right away or to explore the client's experience first.

Begin with Inquiry:

1. Clarify what the client is requesting
2. Request clarification about the client's interest in the information and how it could be helpful
3. Explore the client's current or past knowledge

Request Permission & Provide the Information:

1. Identify what you can share
2. Ask permission to share what you know
3. Present information clearly
4. Address specifically what was requested
5. Address one piece of information at a time
6. Avoid dictatorial language or telling the client what to do
7. Focus on the client's choice to use or not use the information

Inquire Again Following Each Piece of Information:

1. Check-in with the client to find out if they understand what has been shared/provided
2. Clarify whether it is helpful
3. If not, explore what would be helpful

Coaching Response When the Coach Feels Something Would Be Helpful

When the idea comes from you, first take a moment to consider whether it is in the client's best interest to provide it right away or to explore what would be helpful to the client.

Request Permission:

1. Ask permission to share or provide information or education

Only if the client agrees:

2. Explore what the client already knows

   Explore the client's interest in what you have to provide and/or if it could be potentially useful to know

   Explore if they have a preference about how to go about getting the information (e.g. research on their own, go to another resource or receive it from you)

   Only if the client is interested in what you have to share

Provide the Information

1. Present information clearly
3. Address specifically what was requested
4. Address one piece of information at a time
5. Avoid dictatorial language or telling the client what to do
6. Focus on the client's choice to use or not use the information

Inquire Again Following Each Piece of Information:

4. Check-in with the client to find out if they understand what has been shared/provided
5. Clarify whether it is helpful
6. If not, explore what would be helpful

Avoiding Judgments in Coaching

Although we tend to think of a judgment as something critical and negative, in coaching it may be negative or positive. A judgment is something that conveys the coach's personal opinion or perspective.

Examples of Negative judgments

- A judgment may be conveyed by the coach's tone, inflection or pitch or volume applied to a question or reflection: "so what got in the way?"
- A judgment may be conveyed via the words in a question or reflection: "That was a mistake." "You can do much better than that." "What were you thinking?"

Examples of Positive judgments

Often begin with words such as "I think…" "I know…" "I feel…" The "I" may be directly stated or implied.

- A judgement that speaks to the coach's assessment of what the client did well: "wow, you did a great job." "I think you really did a great job." "I know you'll get there."
- Answering a client's question in the affirmative: Client asks: "does that make sense?" Coach responds: "yes it does."
- An expressed opinion: "I like that idea"; "I love it"; "I like what you're coming up with…" A response to a client's report that they did not fully complete an action step: "That doesn't matter, just as long as you tracked it."

Turning a positive judgment around:

Judgment	**Reflection**
Client asks: "does that make sense?" Coach responds: "yes it does."	It sounds like that works for you right now
	Question
	Does it make sense to you?

Judgment	**Reflection**
I know you will get there	It sounds like you feel noticeably confident
	Question
	How confident do you feel? (or use a scale to assess confidence)