



The SeattleCoach Playbook

The SeattleCoach Professional Training & Development Program

Doing the Craft. Being the Coach.



The SeattleCoach Playbook

Copyright © 2020 Patricia Burgin. SeattleCoach® is a registered trademark. All rights reserved.

You may not register or seek to register copyright of any of these SeattleCoach materials, or of any work that includes any part of these materials. No part of these materials shall be copied, reproduced, forwarded, used in new works, registered or sold in whole or in part in any form without prior written further agreements with the author, except as provided by the United States of America copyright law. Any unauthorized usage of this book without express permission of the author is a violation of this copyright and is illegal.

***Our goal is to scale with quality. Once you've completed Modules I and II with SeattleCoach and would like to license the use The SeattleCoach Playbook (and the associated web content and presentation decks) for training and development purposes, contact the author at the address below.
We'll tell you how it works.***

Patricia Burgin, MA Master Certified Coach
The SeattleCoach Professional Training & Development Program
2727 Fairview Ave East Suite F
Seattle, WA 98102
206-412-6224
www.seattlecoach.com
peb@seattlecoach.com

LIBRARY OF CONGRESS REGISTRATION NUMBER TX 8-450-099



Welcome to SeattleCoach!

Since our first Cohort launched in May 2008, over 440 seasoned leaders have completed (or soon will) their foundational coach-specific training through the SeattleCoach Professional Training & Development Program. Some are entrepreneurs who are in the beginning stages of building a professional coaching practice. Just as many are managers, directors and HR professionals and business partners who are becoming coaching leaders on the inside of great Northwest companies. We've all become coaches to help people get better, to make a difference and to help people know what they are ready to say—and how they will say it.

Life is short and every day these extraordinary people remind me that I get to fill a huge chunk of mine doing something I feel passionately about. They've made me a better coach and a better person. And along the way, each one has influenced me deeply and helped me to refine the contents of this **Playbook**. So will you.

The SeattleCoach Playbook is designed to support your learning and progress through our time together and beyond. In addition, on the [Coaches' Hub](#), you will find active links to other resources we will use, along with some key tools for you to customize and personalize. And we will send supplemental insights and direction for both your reading and practice following each of our sessions.

As a carefully selected member of this Cohort, our amazing faculty members who will lead this Cohort, Julie Stringham, PCC and Janet Williams Hepler, PCC and I will support you as you learn and experiment with key coaching skills and competencies, with human change management and with your own coaching presence as you practice “doing the craft and being the coach.”

This edition of **The SeattleCoach Playbook** goes to press in a time of pandemic. None of us has experienced pandemic. We don't know how it goes. But we're in it together, living and learning and grateful. So, welcome to our unique community of coaches and to the larger twenty-first century leadership movement that is professional coaching.

To the journey then!

Patricia Burgin, MA, MCC, LMFT
Founder and CEO
Seattle, Washington
Fall 2020

The SeattleCoach definition of Coaching

"A collaborative—even elegant—conversation, of any length, that fosters a growth mindset by inviting the full, dimensional intelligence and presence of the people involved."

"Vocation is the place where the work you most need to do connects with what the world most needs to have done." Fredrick Buechner

"The big break for me was deciding that this was my life." Jon Stewart

"You rarely have time for everything you want in this life, so you need to make choices. And hopefully your choices can come from a deep sense of who you are." Fred Rogers

"I think midlife is when the universe gently places her hands upon your shoulders, pulls you close and whispers in your ear: I'm not screwing around. It's time." Brené Brown

"I focus leaders on themselves rather than on their followers and on the nature of their presence rather than on their technique and 'know-how.'" Edwin Friedman

"If done well, coaching can elevate the productivity and performance of every individual in the organization. And there is a significant correlation between having a strong coaching culture and market performance." Creating a Coaching Culture, Institute for Corporate Productivity

"If you do not become cynical, if you work hard and are kind, amazing things will happen." Conan O'Brien

"To journey without being changed is to be a nomad. To change without journeying is to be a chameleon. To journey and be transformed by the journey is to be a pilgrim." Mark Nepo

"I try to be alert and available. If you're not available, the sort of ordinary time goes past and you didn't live it. But if you're available, life gets huge." Bill Murray

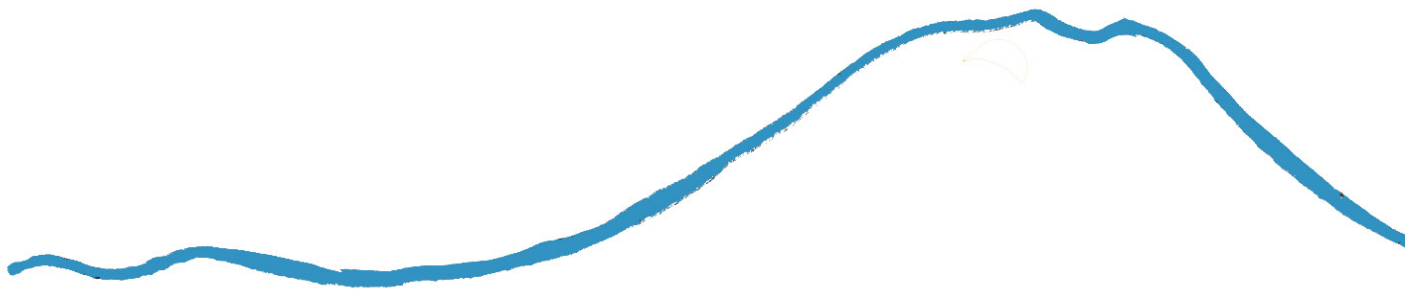
"The mind is not a vessel to be filled, but a fire to be kindled." Plutarch

"Be kind to yourself. If being hard on yourself was going to work, it would have worked by now." Jamie Smart

"Coaching is the craft of effectively creating and delivering highly-customized and collaborative, just-in-time adult leadership development." Patty Burgin

Module I

"The Coaching Alliance: Process, Change and Key Skills"



Doing the Craft.

Module I:

“The Coaching Alliance: Process, Change and Key Skills”



Table of Contents

Our Philosophical Foundation /	7
The SeattleCoach “3-2-1” Rule /	9
Where We’re Headed in Module I /	11
Expectations and Agreements /	12
Working with Your Peer Coaches /	14
Becoming Coachable /	16
Your First Coachees + How Do You Like to Work? /	19
The Informational Interview /	20
A Note About Your Notes /	23
Test-Driving the Informational Interview /	25
Knowing Your DATA /	26
Your Key Words and Your Story (“Engaging Elevator Exchanges”) /	28
Creating Your Coaching Agreement /	30
• A Sample Coaching Agreement /	32
Using the Wheel with the People You Coach /	35
• The Life-Flyover Wheel /	36
• The Big-Agenda Wheel /	37
Logging Hours for ICF Certification /	38
Coachee Session Log /	39
Coaching Through Change /	40
• Model I: Finding Fun and Flow /	41
• Model II: The Transtheoretical Model /	42
• Gradually, Then Suddenly: How Coaching Works /	45
Maintaining Pace and Focus: The Focus Form /	47
• A Sample Focus Form /	48
Key Skills for Practicing the Playcard /	49
The Arc of a Solid Coaching Conversation /	59
Coaching Lab I: A Strong Start /	61
Coaching Lab II: A Complete Ten-Minutes of Coaching /	63
Score Your Key Skills /	65
Introduction to Coaching Ethics /	67
Big Change: One Stroke at a Time /	69
Coaching Big Emotions /	71
What to Expect in Module II /	77

Our Philosophical Foundation

Patty Burgin Talks About the Four-fold and Pragmatic Philosophy of the SeattleCoach Approach

"I think midlife is when the universe gently places her hands upon your shoulders, pulls you close, and whispers in your ear: I'm not screwing around. It's time." Brené Brown

"When God wants to show you something, he takes you on a journey." Bruce Larson

"From the beginning of SeattleCoach I've aimed for far more than coach training. Believing that professional coaching is a leadership movement, I've designed our program to deepen the personal style and presence along with the coaching mindset of each of our coaches. That means that in addition to teaching the essential skills and core competencies of professional coaching, our development of coaches rests on four components.

- 1. "Before I become a coach, I practiced for years as a licensed marriage and family therapist and became increasingly interested in the overlap of my work with the field of Industrial and Organizational Psychology. In our curriculum you will spot elements of Cognitive Behavioral Therapy, Motivational Interviewing, Appreciative Inquiry and Solution-Focused Brief Therapy. And above all,*
- 2. "You will experience my convictions about Systems Theory and its most foundational component: The leader and his or her personal presence. Good leadership is less about skill, data or command of subject matter expertise and more about the leader's ability to understand and navigate the relational climate of their family, group or team. And in Systems Theory, this begins with a **differentiated** leader . . .*

"A differentiated leader is marked by their calm personal authority, their openness to learning more about themselves and their impact, and their ability to then apply that wisdom in the moment. These are the leaders who can address reality curiously, resiliently anchored in their own lives, without slipping into automatic reactivity and blame. They listen to understand as readily as they listen to respond. Or as our coaches at Microsoft are fond of saying, they know how to "press pause, zoom out and make a choice.

"Differentiated leaders may not be the positional leader, but they are almost always the most influential and the most graciously and generously connected. They tend to be contagious in the best of ways, and that increases the overall quality and quantity of connections in the family, group or team.

- 3. "The third component is the emerging field of applied neuroscience: Strengths-based/somatic intelligence and process. Simply put, our human brains learn best and change most positively and sustainably when we are in neurologically safe-enough alliances. "Safe-enough" doesn't mean bubble-wrapped. Coachable people are not delicate, insistent, entitled or victimy. "Safe-enough" means that where there is enough predictability, autonomy, trust and mutual respect, brains and relationships do better, especially in collaboration and conflict.*
- 4. "And fourth, we trust the eclectic human filters of the seasoned leaders we attract. We pick learners: people who are curious, brave, inclusive and patient with discomfort. They don't scare easy. Our participant-coaches bring rich backgrounds in a variety of leadership and management approaches. And they apply their learning in a wide array of settings: With executives and teams, as in-house experts and*

HR professionals and as external entrepreneurs who specialize in executive, individual, team, wellness, adventure and personal development coaching. Because coaching often connects with one's sense of purpose, many of our coaches are informed by their personal faith backgrounds in Jewish, Buddhist and Christian spiritualities.

"In addition, two key factors are unique to the SeattleCoach approach to developing coaches and coaching leaders.

"First is the highly personalized, nature of our training and development. Unlike most coach-training programs, this one meets locally with Cohorts of carefully selected participants. Even as we've had to meet virtually, we hold open the hope of being together in the same room soon.

"And since SeattleCoach is an approved coach-training provider, your work in Module I and Module II will put you on a path to professional credentialing via the International Coach Federation (ICF).

"Finally, you are joining [a tribe of hundreds of other SeattleCoaches](#) who share your coaching heart, approach and vocabulary. You can join the conversation (and bring your quotes, stories, resources, events, opportunities, requests and learnings) on our private Facebook group page. Just type "SeattleCoach" in your FB search box, click on the 'group' and we'll approve your membership asap.

"Oh, and [click here](#) to smile through our most recent SeattleCoach Anniversary video."

The SeattleCoach “3-2-1 Rule”

For Coaches Who Are Planning to (1) Make Money, (2) Have Fun and (3) Do Good

*"To journey without being changed is to be a nomad. To change without journeying is to be a chameleon.
To journey and be transformed by the journey is to be a pilgrim."* Mark Nepo

When we interviewed you as a prospective member of this Cohort, like good coaches, we asked you about the vision and goals you were ready to pursue in this big new chapter of your professional development. Though the focus of our months together in Module I and Module II will be on your development of coaching skills and presence, we'll keep in mind the additional work before you of successfully carving out your specialty and niche.

We'll talk about the economic value of this new leadership gear you're learning. Whether you plan to open your own practice, or to find enough sponsorship inside of your company to make coaching part of what you're paid to do, we'll help you to think about your visibility and about how to become found and trusted and hired by the people you most want to serve.

Over the years, I've noticed that the SeattleCoaches who are happiest with their development settle into a journey. The **SeattleCoach "3-2-1 Rule"** has proven to be true for both entrepreneurs and internal coaching leaders who want to make coaching primary to their professional identity. As you continue to get better at "doing the craft and being the coach," plan on:



Three years

Two Jobs

One day

Three years

of steady progress as you become a coaching subject matter expert (SME). During this time, in addition to earning your [SeattleCoach Badge](#), you will likely complete the [requirements](#) for credentialing with the International Coach Federation (ICF).

Along the way, we'll give you visibility on our [SeattleCoach Network Page](#). You will also learn how to help your ideal clients to find you as a coach. These people will come first from people who know and trust you and the people they know. Your web presence will help—especially if your first coachees see themselves in what you offer. If you start with people you have no relationship with, you may get frustrated. Start with people who already trust you. Also, during these three years, we'll encourage you to keep

Two Jobs

First, your "day job" (the one that pays the bills or the one for which your company hired you). And second, the job of building your expertise and brand (i.e. what you want to become known for) as a coach or coaching leader. In other words, unless you are independently wealthy, plan on holding two jobs for about three years. And even after you have enough momentum and market to shift your weight to more coaching, plan on spending the equivalent of

One day

a week to continue to build your expertise, your content, your opportunities, your visibility, your partnerships and your practice. If you're an entrepreneur, you will also do the work a [business owner](#) has to do. Successful coaches can't think simply

in terms of billable hours. They spend their day a week listening, curating, understanding and getting better. They use low-fee and pro-bono opportunities to create and refine their content and processes—along with their visibility to their ideal clients. They learn to use workshops as “engines” for both their visibility and for the 1:1 and group/team coaching they contract to do. The-day-a-week part of the “3-2-1 Rule” is a brand-builder. You’ll do it for as long as you practice. I do.

Coaches who steadily practice the SeattleCoach “3-2-1 Rule” during Modules I and II and in [the Advanced Cohorts that follow](#), tend to be the most successful in the ways that matter: In their professional growth, in their relationships, in their personal peace and in the economic value they bring to their ideal clients. As a member of the SeattleCoach Network, you are in a great position over time to give and receive both support and challenge and to build some fantastic collaborations with others who share your journey. Think of the “3-2-1 Rule” as a get-rich-slow scheme.

To the journey then, indeed.

Where We're Headed in Module I

Part A	Introduction to Coaching and to this Cohort
#1	Expectations and agreements as a Cohort Introduction to <i>The SeattleCoach Playbook</i> Session focus: The Informational Interview
#2	The Informational Interview Introduction to The Play Card Session focus: Creating Alliance, Agreement and Agenda
Part B	Talking about yourself as a coach; How Humans Change; Intro to Key Skills
#3	Coaching Through Change Three coaches present their DATA + “How they’re talking about this” Session focus: The Play Card, The Wheel, Working at Level III
#4	Coaching Through Change: Identifying the Agenda and the Stage of Change Three coaches present their DATA + “How they’re talking about this” Session focus: Key Skills Part 1
#5	Coaching Through Change Three coaches present their DATA + “How they’re talking about this” Agreements Session focus: Key Skills Part 2 Prep for Coaching Lab I: A Strong Start
Part C	Key Skills Continued and Live Coaching Lab I, The Mid-Term
#6	Session focus: Key Skills Part 3 + Preparation for Coaching Lab I: Setting the Stage
#7	Session focus: Key Skills Part 4 + Coaching Lab I: Setting the Stage
#8	Session focus: Key Skills Part 5 + Coaching Lab I: Setting the Stage
#9	Session focus: Review + Coaching Lab I: Setting the Stage
#10	Session focus: Mid-term; Preparation for Coaching Lab II
Part D	Live Coaching Lab II
#11-#13	Sessions focus: Coaching Lab II: A Complete Ten-Minutes of Coaching; Coaching Ethics
Part E	Review requests, Personal Review and Preparation for Module II
#14	Session focus: Scenarios; Demos; Coaching Emotion; Coaches review “Where Things Stand” as we approach Module II
#15	Session focus: Scenarios; Demos; Coaching Emotion; Coaches review “Where Things Stand” as we approach Module II; Celebration, certificates, preparing for Module II

Note 1: We will give you two versions of this Playbook: A hard copy and a .pdf. When you open the .pdf, you can click on “add notes,” to insert your own highlights and notes. And if you prefer to read on your Kindle, [click here](#) for instructions about how to send it over to your device.

Note2: The page numbers you may see in our homework emails may not match what your e-reader comes up with.

Note 3: We’ll add you to this Cohort’s “Microsoft Team.” When we do, you’ll receive an email about how to join. Just follow the steps to either join via the web version or to download the free app.

Expectations and Agreements for our Cohort

Every effective team fosters trust by building agreements about both the “whats” and the “hows” of their work together. In the months to come, with similar agreements, you can expect this coach-training Cohort to move from being a group of strangers to becoming a team of potentially life-long colleagues.

The What

Like the other members of this Cohort, you’re here because you want to be a great coach or coaching leader. And we’ve invited you to be here because you’ve got the stuff that’s hard to teach: You are socially and emotionally intelligent, you’re ambitious about learning and you laugh easily. You probably already know what it’s like to have friends and family turn to you for counsel and advice. As we begin, you should know that we are committed to your personal and professional development—and to the way this group of strangers will grow into a team of colleagues.

As we move into this journey together, we’ll ask you to start test-driving the coach-approach right from the start. Typically, your first coachees will come from:

- Your manager asking you to see how coaching could help to develop the talent and capacity of the people who work with or for you.
- Maybe you’ll experiment with being a coaching presence with a group or team
- Maybe you’ll experiment with someone from your personal network.

In our examples, expect us to speak about your “coachees.” Or we’ll simply talk about “the people you’re coaching.”

The Hows

No surprise—the people who get the most from this training and development and begin the journey towards mastery in coaching, are the ones to show up, connect, prepare well and participate.

Throughout our time together, we will “flip the classroom” i.e. we will introduce you to lots of new theory and material via this Playbook, the website and the emails that follow each of our meetings. In both your pre-work and in the work you do following each of our meetings, we expect you to take in new information on your own schedule, at your own pace and in your own way outside of class.

Flipping the classroom means that as you begin to acquire new learning and to process it through your own wisdom and experience, we can use our time together to do what a great team does best: To be a place of collaboration, trust, creativity and even of failure and recovery—to get hands-on in the tasks of assimilating what you’re taking in. When flipping the classroom works, you also extend your learning into the flow of both your partner coaching and into your existing work.

What We Expect from You as a Member of this Cohort

- To read/listen/reflect on everything we send you: Pages, links, attachments, podcasts and things to practice and reflect on. Faculty coaches are expected to keep themselves exposed to state of the art thinking in our profession and to challenge you to do the same, starting now. This makes our facetime

together richer and more challenging. Plus, way more fun than the traditional lecture/note-taking method.

- We also expect you to come to our sessions ready to participate and play! The team needs you.
- To be available to each other: For every two hours we're together as a Cohort, we will ask you to do a full hour of work with your peer coaches. This can be face-to-face, virtually or on the phone. This is a big part of the deal. Your hours spent with your peer coaches may be counted as pro-bono hours toward your first 100 hours required for your ACC credential, so you will want to start a log as we get underway. We'll show you how.
- We expect you to create a way of organizing your notes, resources, coaching hours, documented training certificates and personal learnings. Hard or digital—just so it's easy for you to access. Great coaches have a way of “curating” their resources, reflections and documentation both for their own professional development and on behalf of the people, groups and teams they coach.
- You may find it useful to start a learnings-and-hunches journal as well.
- And we expect you to be in touch if you get stuck or mad or thrilled. One of the reasons this program happens in two distinct sections is to allow for participants to exit at the completion of Module I if they find that either being a coach, or training with us isn't a fit after all. That's rare, but part of the job of your mentor coaches, like any good team leader, is to help people with questions or concerns to stay, or to help them to leave while protecting the integrity and momentum of the Cohort. We welcome your ideas and feedback any time.

What You Can Expect from Your Faculty Coaches

- In each of our meetings, we will give you our best shot.
- In the first few sessions we'll do a lot of the talking but as we move along, we will build in more and more time for your wisdom, questions and insights.
- We'll take a break every hour so you can stand up, move, socialize, etc. We will ask that, if possible, you put away your devices during our time together—even during our breaks. In all our workshops we ask people to pull out a pen. After the eye-rolling stops, engagement, socializing and retention both seem to go up. Looks like we're onto something. According to science.
- We'll start and end on time. And in the five minutes before we launch we might play something from the SeattleCoach music playlist. (And we welcome your coachy contributions as we go along.) And we are always available for “office hours” in the fifteen minutes before each of our meetings.
- Feedback plays a key role in all great work. And the best feedback is bite-sized, constructive, personal, respectful, specific and close to the event, so we're always listening for it. Don't expect us to ask you for a big evaluation when we reach the end of Module II—that might help SeattleCoach, but not you. You can count on our active learning.
- You can expect us to bother you if we begin to see a pattern of you not-being-prepared or available to your peer-coaching partners.
- Confidentiality. In our months together, you will be equipped and you will also be coached and mentored by us and by members of your Cohort. As a member of this training Cohort and in the partner coaching that is part of this training, we ask that you agree to maintain the confidentiality of all information communicated to you by other group members. Progress is enhanced when group members discuss their work with trusted colleagues and friends outside of the Cohort. But even in these discussions, we'll expect you to be very careful not to share any specific information belonging to others in your Cohort. Bottom line, we will be rigorous about The International Coach Federation (ICF) Code of Ethics and ask you to do the same.

Working with Your Peer Coaches

“I never fail. I either win or learn.” Nelson Mandela

At SeattleCoach we know that when peer coaches practice together, they become significant allies, maybe even life-long friends on the road to professional coaching. Between each of our sessions we'll ask you to meet for an hour with two or three of your peer coaches. Whether face-to-face, virtually or on the phone (we want you to get good at each), everyone will have multiple opportunities to be the “coach,” the “coachee” and the observer. We'll rotate every few weeks so that by the end of Module II, you'll have had time in each role with the members of your Cohort.

Preparing for your meeting . . .

- Everyone: review your notes, readings from The Playbook, your Play Card along with the homework. What are the skills you want to explore, practice and make your own?
- Preparing to be the coach: review your strengths, growing edges and something you want to experiment with or get better at.
- Preparing to be the coachee: come prepared with a personal coachable agenda to practice with.

If you get stuck for an agenda, ask yourself, *“What’s coming up this week? An opportunity? An obstacle? Something to think through or get better at?”* The most easily accessible coachable issues are often related to challenges you will face between now and the next conversation. For example: *A transition, a performance issue, a relationship challenge, an outcome or maybe a communication strategy.*

When you’re together . . .

1. Begin by establishing roles: choose a coach, a coachee and an observer. Decide who’s watching the clock.
2. The coach sets the stage for good feedback by naming their growing edge.

Then for twenty minutes . . .

1. Then the coach and coachee work together, exploring the agenda, what the evidence of success would be, why it matters and maybe who else is in their thinking as they explore it. Find a next step.
2. Observers keep your focus on the coach and what the coach is doing.
3. After twenty minutes of coaching, the coach and coachee agree on a good place to stop.

Coaches—when you’re stuck: Call a timeout to brainstorm with your triad for one minute.

Then for ten minutes . . .

1. Observers: Be the “container” and guide the process.
2. Start with the coachee: *What worked? What are you more aware of? What would you have liked more of? Less of? What is unique about this coach? What will you do because of this conversation?*
3. Then turn to the coach: *What choices did you make? What did you experiment with? What did you notice about your internal dialog? What did you learn?*

4. Finally, the observers: *What did you notice about the growing edge that the coach identified? What did the coach do that got your attention?*

Then rotate roles and try again. In your weeks together, make sure everyone gets to “sit in each seat.”

Again, it’s fine—and even useful to take a few notes (as long as you can keep listening well). Just remember that your partners’ information belongs to them. We’ll be talking about what ethical confidentiality looks like in practice.

A note about giving and receiving “feedback-ish”

We’ll be talking a lot about how coaches speak truth—even hard truth—as they faithfully serve the people they coach. We know. Whether you’re on the giving or the receiving end, that word, **feedback**, can be the most horrifying in life. As in, *“I have some feedback for you. You’d better sit down.”* Maybe (like with another word, **accountability**) you have a sad history with it.

If so, as we move through our months together, we think you’ll experience a little resetting as you experience the elements of great feedback that come from someone you trust:

1. You speak from calm authority, using yourself and being open to learning and being influenced.
2. You see to serve more than to please; to invite rather than to confront.
3. You speak as closely as possible to the “event” or observation.
4. And with curiosity and specifics. You speak to what is changeable and growing.
5. Over time, you feedback and the relationship that fuels it focuses on strength, values and accomplishment more than on failure and rough patches.
6. You stay mindful that they long to be great coaches and their version of “excellent” will be a little bit idiosyncratic.
7. And, of course, even when you’re speaking with directness as a faithful “truth-teller,” unless the house is on fire, you are curious, respectful and unhurried.

Our SeattleCoaches from Germany, Russia and The Netherlands have consistently observed, *“You Americans are so nice it’s confusing! We’re blunt and direct and it’s ok if you are too. Say what you mean!”* This is known as valuable feedback about giving feedback.

People hear us differently when they are safe enough to be open. Extend grace to your partners. You’ll be practicing and coaching a lot with them and they will become your trusted allies and friends. We’ll have more to say about offering feedback as we grow together.

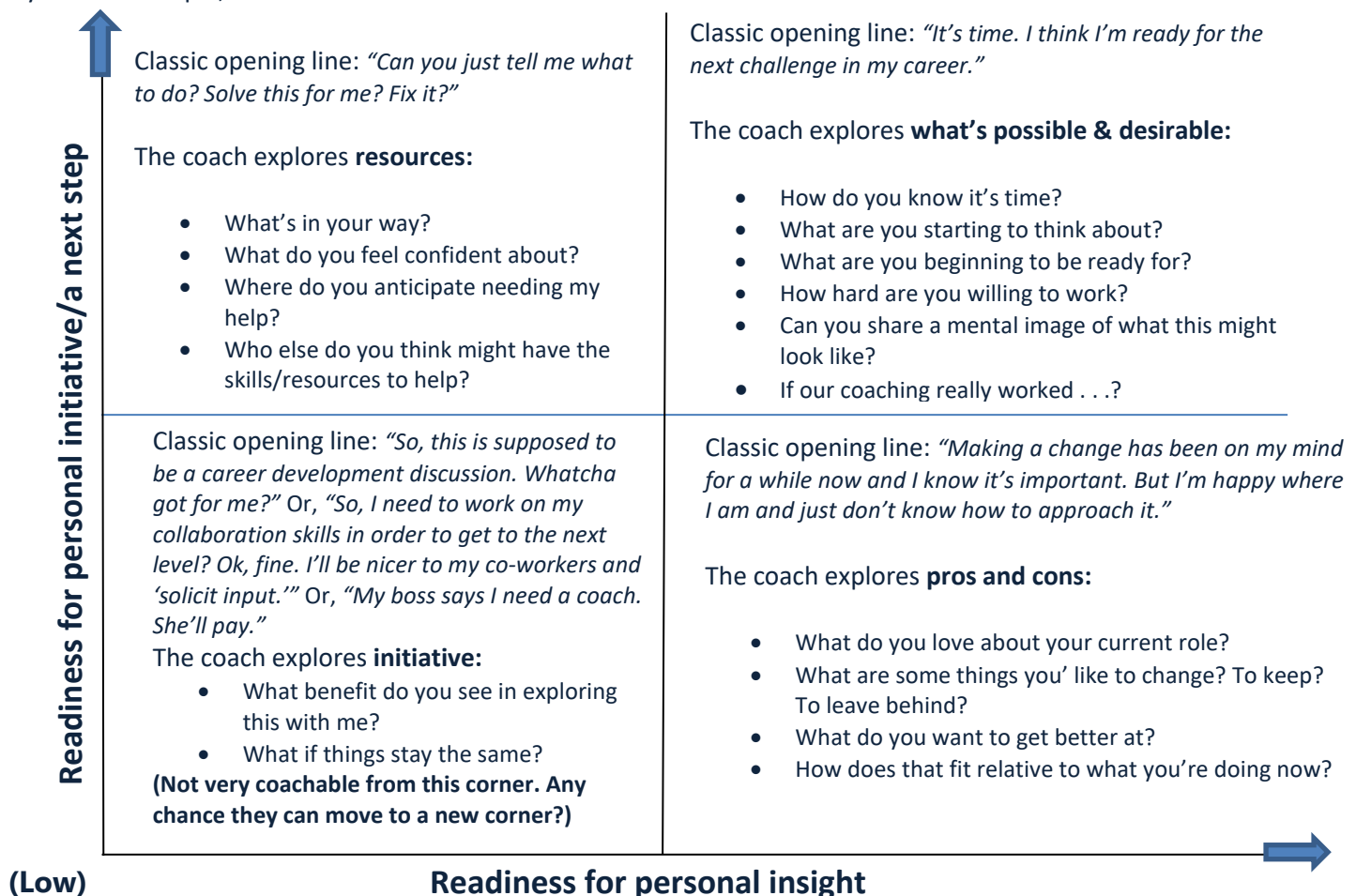
Becoming Coachable

As coaches, we begin with the belief that the people we coach are creative, resourceful and responsible for their own growth and change. They are ready to discover new things about themselves. That belief, of course, must begin with the way we approach our own lives—and our participation in SeattleCoach. With your peer coaches, you'll have a chance to explore your own defaults and habits and what it could look like to find your own possible and desirable next steps towards more contribution and satisfaction. You'll be challenged to be bravely vulnerable as trust grows. And you'll acquire a deep understanding of what we mean by "coachable."

All of us have spent time in each of the following "quadrants." People in each starting place either are or could become coachable if they are willing to look at their own insight and initiative. Can they be open to their own heart and hunches? Open to what makes them a gift to be around? Open to knowing when they are annoying? Can they be tough-minded about taking responsibility rather than searching for someone to blame? Some come coachable, others, with the right questions and expectations from you might soon become coachable.

As you begin to coach others, you help them understand how coaching works. Remember? It's a *"collaborative—even elegant—conversation, of any length, that fosters a growth mindset by inviting the full, dimensional intelligence and presence of the people involved."* If you're a leader who wears several hats, there are urgent moments when your job is teach, fix, direct, manage and to deploy your subject matter expertise directly.

However, if your goal is to foster learning, performance and improved competency and presence in individuals and teams over time, the challenge is to try the coaching gear first. Maybe the person you're talking to will join you. For example, the career discussion . . .



So, what if it turns out that the person you're coaching needs a different kind of resource instead of—or in addition to—their work with you?

Maybe the person you're in conversation with truly has a missing resource: They need direction, some specific legal or professional expertise or maybe an executive decision. Great coaches build a resource network of lawyers, clergy, therapists, organizational or HR resources and consultants.

What about referring one of your coachees to a therapist? When that place in your gut starts flashing its yellow warning light:

- When someone believes the location of change is exclusively outside of themselves and their focus is fixed on a grievance or entitlement or on the identity of being a victim, or
- When you see marked changes in mood or performance, withdrawal or change in appearance
- When you hear hopelessness (always at the core of suicidal thoughts)
- When a person is behaving unreasonably or unethically (or illegally), or
- If they are in active addiction or have a compelling mental health challenge and/or
- If they are unable to look at ways in which they may be causing harm to other people.

As a coach, I count on growth and healing, so I hasten to add that following some very clear and gracious initial conversations through the years—times when I've turned people down for coaching and explained why and suggested another resource—I've seen people become unstuck in meaningful ways. And then sometimes I coach them.

One of our coaches at Microsoft, La Tasha Byers, has suggested this way of thinking about what's coachable and what's not.



Two resources from the ICF to put in your personal resource network:

Referring a Client to Therapy

- The “Refer a Client to Therapy” [White Paper](#)
- [The one-sheet reference guide](#) (Why, When, How, Signs and Symptoms)

Your First Coachees + “How Do You Like to Work?”

In addition to your peer coaching, we’ll give you encouragement and ideas for finding the first people to whom you will offer coaching. Whether you’re working internally or externally, the word will get out that you’re going through coach training and development and volunteers will appear.

If you’re working internally, you will likely be coaching your own employees, colleagues and mentees. You’ll want to create an agreement with your supervisor about how you’d like to add a coaching mindset and approach to your leadership. As a coaching leader, we’ll help you to find ways to recognize coachable moments and coachable people with whom to practice your coaching skills and presence. We will challenge you to try coaching first (vs. telling, directing, telling, nagging, selling, convincing, propping up, firefighting, etc.). Think about yourself as a coaching leader as “learner” vs. “knower.”

We know that as a leader sometimes you must give direction or use your subject matter expertise. Sometimes, the purpose of the conversation is time sensitive. But as you develop coaching skills and presence there will also be times when you simply recognize a “coachable moment” with a colleague, a group or a team.

As you learn to step into those drive-by moments, you may find that you have a huge impact in a very brief amount of time.

If your plans are to be an entrepreneurial coach, you don’t have to worry about charging right away, but you will want to start thinking about your terms. We’ll be talking more about Coaching Agreements in the weeks to come. Whether they pay you or not, whether it’s part of your job or not, plan on telling the first people you coach that you’ll be asking them for their feedback.

You can absolutely count the time you spend coaching toward your first 100 ICF hours now if:

- You’re coaching.
- There’s an agreement—even a verbal one.
- You’re counting the actual time spent.
- And you have your coachee’s contact information and permission for your ICF coaching log. If you’re coaching people as a part of your leadership role in an organization, you will just need the signature of your supervisor on your coaching log.

Bottom line, during training we want you coach. A lot. Seriously. Listen, create safety and respect, work on insight-creation and co-create the experiments that your coachee is ready for.

There is another question that operates in the background as you begin to let people know that you’re developing as a coach or as a coaching leader: How do you like to work? Whether your agreement is a handshake or a brief written contract with an individual or an organization, you will include a few of personal preferences. For example:

- Do you like to work face-to-face? Or virtually? Or on the phone?
- If you’re coaching as part of your job, how will you explain when you’d like to experiment with a coaching approach? How will you ask for feedback?
- Will you track and send notes? Or will this be your coachee’s job?

- Some of your coaching leadership might happen ad hoc, but when you're scheduling a coaching conversation, what length of time will work best for you? Twenty minutes? Forty-five?
- How can you imagine using your subject matter expertise (SME) as a coach?
- If you're coaching externally, how are you thinking about charging for your time as you get underway?

Start now to keep track of your “terms.” If they matter to you, they will find their way into how you talk about your work and how you frame your coaching agreements. And your personal clarity will contribute to your trustworthiness as you build alliances with your coachees, employees, mentees and team members.

Think about how you talk about yourself when welcoming a new team member or kicking off a project with new stakeholders. How will you talk about your emerging coaching superpower?

The Informational Interview

When an individual or an organization contacts me to discuss the possibility of working together, I ask that we meet first to ask each other questions. My goal is to begin to understand their current situation, to build trust and to uncover both the destination they are hoping for and the resources we can leverage, to explain how coaching works—and what it's not, to listen for coachable issues—and a coachable person. Sometimes people become “coachable” as I simply explain how it works. Sometimes we find out that they need a different resource. To help orient new coachees to “how this works,” I ask people to read the [information on my website](#) about what to expect in working with me prior to our meeting.

This meeting is both complimentary and an opportunity for both of us to ask questions. You can expect people to have researched coaching and coaches—and to have tried lots of things--by the time they contact you. They come with some very informed questions and requests. And they come with some restlessness, frustration, hope and/or pain.

In my response to a new potential coachee, I'll usually say something like, *“Let's find a time to ask each other questions for about twenty minutes and then I'll push the pause button and check in with you. If I think I can help, I'll tell you. If I think someone else would be a better fit, I'll tell you. If green lights ensue for both of us, then I'll have time in my schedule to move into our first session”* (which for me is about an hour and a quarter). *“If not, you don't owe me anything.”*

As we talk, I keep in mind my “coachability” questions and my “how-do-you-like-to-work” questions. I ask them if it would be ok if I take a few notes. But more than anything, I show up like a host: I'm warm, welcoming, curious, open. Afterall, these are the first necessary steps in co-creating alliance, agreement and agenda. Or not.

Let people experience you as a coach from the start. Don't just tell them, show them what coaching is like. Build trust. The type of coaching I'm challenging you to get good at in the weeks and months to come is far more like an elegant conversation than about the application of a technique or tool or formula or special set of questions. As you move through the interview, be a coach. If you're a match, great. If not, someone (maybe you) has been protected from a bad or mediocre experience.

In my own practice with both individuals and organizations, I spend a lot of time up front exploring and ensuring that the work is a good fit. Sometimes I end up giving away time to someone who ends up elsewhere, that's part of the professional deal.

For the first several minutes. Listen-listen-listen: Remember, **Level I** listening is for your own self-interest—maybe you're listening for something you need, or for an opportunity to respond, or to demonstrate your expertise. Maybe you're not really listening at all. You're reloading. At **Level II**, you're listening for data, information, context, history. A little bit of Level II can be useful, but a little goes a long way. It is at **Level III** where the magic happens: You're listening—beyond the words—to understand the thinking, strengths, hopes, obstacles and ways of this life before you.

You are creating the conditions of trust that are required for a different kind of conversation. Get a glimpse of your coachee's life, follow their energy and find out about the thing that they want to solve or change. Invite them to deepen their experience of the reality of the potential shift. What if it does? What if it doesn't? Reassurance (“everything will probably work out . . .”) isn't very useful here. As always, resist the impulse to solve problems, prop up, rescue and fix things. This person has already (usually) tried most of what you might suggest. They have likely contacted you because they are at a point of transformational change: A major exploration, a letting-go or maybe a crucial series of experiments and conversations.

And your potential coachee has a few questions of their own: *Will this coach “get me?” Will we be a good match? Does this coach know what he’s doing? Will there be the right blend of support and challenge?* This person is looking for a partner who will help them to look at themselves and their situation with new eyes. Maybe they’ve come to the right place.

I. Some potential questions to explore with your potential coachee

- *What’s going on? What made you want to contact a coach? Why now?*
- *What are you hoping for?* (Sometimes the answer to this question takes some patient exploring.)
- *What have you tried? Where have you been stuck? What hurts?*
- *What are you asking of yourself at this point in your life?*
- *What personal strengths and values have you been thinking about?*
- *If you could search what you’re wondering about, what would you enter?*
- *What are the results you need? The behaviors that you think will be necessary? Challenges to anticipate?*
- *What will success look like?* Explore goals specifically and behaviorally—their outcomes might surprise you. (*“I’d contribute more. There’d be more trust on my team. I’d sleep better. Oh. And my teenager would talk to me again.”*)
- *Who and what does your work serve?*
- *Who’s in your corner? How does your manager or significant other feel about what you want to work on in coaching? What about the investment of time and money?*
 Deepen the exploration: *What if things stay as they are? What will success look like?*
Specifically and behaviorally, what outcomes can they envision?

II. Anticipate some of their questions and concerns about working with you (some of your answers will eventually be reflected in your web presence)

- They are wondering, *“Are you competent? Experienced? Trustworthy? Trained? Credentialed? Do you understand this professional sector and its vocabulary? What about confidentiality? Will the phone work?”*
- Anticipate logistical questions: *“How does coaching work? How long? How frequent? How much?”*
- And a bottom-line question: *“Do you think you can **get** me/my organization? Have you worked with people like me/us before?”*

And after a few minutes, check in, “How is it for you as you talk to me about this?”

III. Explain how you like to work. Again, your calm clarity will be grounding. For example,

“If we were to work together, I’d want to put on my coaching hat often during our one-on-one meetings this quarter.

“Every time we meet, I’ll begin by asking you what you the focus of the time to be. That will usually flow out of the reflection and experimenting you do between our sessions.

“Every time we meet, we’ll be paying attention to possible next steps.

“From time to time, based on what we’ve explored, I’ll have requests and challenges. When I do, I’ll expect you to say yes or no or to make me a counteroffer.

“I invite the people I coach to check-in any time via text, email, voice mail between sessions. If you want me to get back to you, just ask.

“Here’s how I like to evaluate our progress.

“Here’s how we might know we’re at a stopping place . . .”

IV. Give your feedback and recommendations, for example

“Let me tell you what I’ve heard you say: You love, you hope, you’re worried, the challenge for you is . . .

“This is a very coachable problem/issues/opportunity . . .

“There are lots of coaches . . . (I think I can help or, there might be a better match . . .)

“I’d love to work with you.”

Some key things to pay attention to in yourself as you interview a potential coachee

- What’s it like to be with this person. Any red flags in your intuition?
- Do you see any conflicts of interest? That is, dual relationships or a mission at odds with your own values?
- A good first step in knowing you could be the right coach to work with this person or team: Will you be able to confidently and consistently show up as an important part of this person’s life?

V. Explain the next steps

- Talk about how you’ll structure your time together (frequency, amount of time, etc.).
- If you have a written agreement--or some getting-started questions--ask them to reflect on them before your first/next meeting.
- If this person needs a referral to someone other than you, offer to help them connect with the right resource. (You will begin to build your own referral list, but if you get stuck, call me any time.)

A good informational interview is the first step to building a solid coaching alliance and agreement and to understanding your coachee’s agenda. At the end of twenty minutes, if it feels like a match to me, I’ll say something like, *“This is coachable and I can help you.”* And I ask them if they would like to move forward. If so, I do something to pause, smile, mark the moment and launch.

Read more about it . . .

Patrick Lencioni’s great business fable, [Getting Naked](#) (2009). Mr. Lencioni doesn’t know it but I’ve made him an unofficial member of the SeattleCoach tribe. His philosophy reflects our own when it comes to working with and serving people.

A Note About Your Notes

(This page will be especially useful for external, entrepreneurial coaches)

From the time someone contacts me, I document the coaching partnership. I will, with permission, take a few notes during the complimentary informational interview and then, if the person and I agree to work together, I will start a folder with their name on it. And then every time we meet, I will write down and date a few notes.

And if you're an internal coaching leader, you may not have to document your work this thoroughly, but you will want to have a way of tracking progress and protecting the confidentiality of both the people you coach and of your company.

Why do I keep notes? Two reasons: To keep track of the agenda, exploration and accountabilities of the person I'm coaching. And, as an external coach, to show that I'm doing my job professionally (which may protect me in case a lawyer ever has reason to examine my work). My notes are brief, simple and regular. I don't try to capture everything—that would get in the way of my curiosity and listening.

Here's what goes into a typical folder (samples for each of these are included in this Playbook):

1. A cover page
2. Notes from the informational interview
3. An agreement signed by both coach and coachee which includes all the details that matter to the coaching relationship: *How we will talk about the agenda, money, boundaries, accountabilities, course-correcting and even how we will conclude.* I make a note of any additions to our agreement that we add or change along the way.
4. Session notes and/or focus forms which include:
 - a. The date of each meeting
 - b. The agenda
 - c. Key questions or tools (like the Wheel)
 - d. A coachee's quotable quotes and epiphanies
 - e. Action steps/accountabilities
 - f. Notes about where the coach has consulted with a mentor coach
 - g. Notes about any emails, voice mails or text that have been exchanged
 - h. Written consent if your coachee asks that you talk with another professional

What doesn't belong in your notes: Anything you haven't talked with my coachee about, or plan to. Anything that would be hurtful either personally or legally.

These are my documentation bottom lines:

1. Whether it's in email, OneNote files or in hard copies, I keep all my folders secure. In addition, the people I coach tend to keep their own notes about their progress and learning. I think of my notes as ultimately belonging to the person I'm coaching.
2. Confidentiality is pretty simple: If there is a sponsoring manager asking me to coach members of his or her team, I invite them to weigh in on the agenda and to evaluate our progress via the performance and

engagement of the person I'm coaching. I make sure that everyone knows that the actual content of coaching conversations stays between me and the person I'm coaching. Then we evaluate outcomes and update the agenda periodically. If a coachee is finding it tough to talk with his or her manager, we talk about that as an agenda item (i.e. I don't become the messenger).

Over time you will develop a style and an approach to the way you foster a great coaching relationship. Not a formula, but "the way you like to work." Your notes will reflect both your approach and your professionalism.

In upcoming sessions we'll discuss coaching ethics and what to do if you find yourself in a tough situation.

Test-Driving the Informational Interview

(There's a digital copy on [this page of the Coaches' Hub](#))

Name _____ Referred by _____ Date _____

- I. As you begin to use your natural strength of connecting and listening to people, be gently curious. What is the coachee hoping to accomplish or get better at? Use your questions to explore the details they share, the language they use and the specific outcomes they are longing for. Is this a coachable person? Are you beginning to identify potential coachable issues?

- II. Anticipate their questions.

- III. Explain how you like to work with the people you coach.

- IV. Offer your feedback and recommendations.

- V. Explain the next steps.

Knowing Your D.A.T.A.

There are a zillion ways to know yourself better. In addition to assessments and inventories, try thinking through these four categories. Before anything else, the role of any assessment is for your coachee to better understand his or her own story, hopes and resources. Of course, assessments also help us as coaches to shape our curiosity and questions. Think of this as much as an intuitive and emotional exercise as an analytical one.

Desires.

What do you feel passionately about? If \$\$ were no object, what would you do? What do other people love about what you do—and would (or do) gladly compensate you for? Other than money, how do you like to be compensated? What did you love as a kid that you still love?

Abilities.

This is the stuff that tends to show up on your résumé. What goes on your list of unique skills, training, professional capabilities, experience, etc.? For example: managing projects, info tech, writing, speaking, solving problems, ability to learn from experience, working as a part of a team, working with your hands, leadership and influence, managing teams, making agreements, etc. This is the subject matter expertise (SME) that you've spent years learning and refining.

As you think about your Abilities, you'll notice some bring energy, others may feel ready to retire.

Temperament. This is the Core of who you are. I expand "temperament" to mean a few other things, like:

- knowing how to understand and use your values (time and \$\$),
- knowing how you like to solve problems
- how you're likely to behave in conflict, or when you're stressed or exhausted
- what happens when you're physically, emotionally, socially at the "top of your game"
- what happens when you're mobilizing for action
- what makes you tiresome and irritating to be around
- what makes you wonderful to be around
- knowing how you recharge your batteries

Assets.

These are the life advantages that can deepen the work you do and the conversations and situations you get into. For example:

- You grew up with or have become fluent in a second or third language
- You have a faith tradition that informs your approach to life and relationships
- You've never met a software program that you couldn't master
- You have a family member with a disability
- You're in solid recovery from an addiction
- You were an Eagle Scout or a Merit Scholar
- You are a parent

Thanks to William Bridges, who wrote early and often about transitions, for first suggesting the DATA acronym.

Your DATA Worksheet

(There's a digital copy on the [Coaches' Hub Module I page.](#))

Desires	Abilities	Temperament	Assets

Your Key Words and Your Story

(“Engaging Elevator Exchanges”)

Making it possible for people to understand why becoming a coach or coaching leader matters to you—and then helping them know what to expect

“Vocation is the place where the work you most need to do connects with what the world most needs to have done.” Fredrick Buechner, Wishful Thinking

Coaching is a young professional and leadership movement. And people are starting to form opinions about it. As someone who is learning to coach—whether your plan is to work internally or externally—how will you begin to talk about this new chapter in your life?

If you’re genuinely interested and generous with people, if you listen more than you speak and if you can tell your own brief but compelling story, you’ll find people who are eager to know more about why you’ve decided to become a coach.

Something your story reflects what you believe and where you stand. Can you have a conversation that adds value to people who are curious (some of whom you may coach in the future)?

Imagine you’ve got few minutes to speak to one hundred good people about your work as a coach. And imagine that embedded in your audience are ten people who have been looking for you! They’re excited to meet you and to tell you what they’ve been thinking about. You are the one they’ve been looking for! Maybe you are already engaged with them as a leader or as a colleague. What do you say to help them to recognize you? How will you talk about why you’re going through coach training and development? What will you decide to share about your path? How will they see themselves in what you say?

Now imagine what you’d say when they come up to you afterward. Or what you’d say to someone at a party when a friend introduces you to someone saying, “You two should meet each other!” in about eight seconds: how would you talk about the heart what you’re learning, your story or maybe why you’re going through coach training and development. Then you ask them a question. Could you show up as a coach: calm, clear and curious rather than giving a speech or telling and selling?

This isn’t a glib commercial or a bit of smarmy self-promotion. If you’ve got the heart of a servant-leader, it’s just an engaging starting point. In the words of one of our coaches, “*nothing can happen in baseball until there’s a pitch!*” If you do it well, people who are interested in growing will be curious to hear more.

Listen to the three brief audio clips in the middle of the [Coaches’ Hub Module I page](#).
The goal is to inspire and invite a great conversation.

Once you’ve listened to my explanation and examples, see if you can develop a similar invitation. You may find that the reflection you’ve just done on “Knowing Your DATA” informs what you decide to include and exclude.

We may ask you to put yourself in the spotlight, to deliver what you’ve come up with and to receive feedback from us as your colleagues. Then, as we progress together and as you find yourself identifying what you love about coaching, you’ll find yourself building other ways to talk about this work.

As you have a conversation with yourself about how you'll talk about, "Why this training? Why now?" You will likely begin to find people who would be interested in doing a set of practice sessions with you—or they will find you.

And you will begin to experience what business calls the "Know, Like, Trust" (KLT) factor: The more someone trusts you, the more they will be able to explore how a coaching partnership with you could be useful in their personal and professional growth.

Creating Your Coaching Agreement

By now you've probably been thinking about "how you like to work." Now it's time to create the first version of your coaching agreement. Whether it's a handshake or something written, what you say to the people you coach about your expectations will help them trust you as their coach.

Some SeattleCoaches are adding coaching to their existing leadership portfolio as managers, supervisors, directors and HR professionals. Other SeattleCoaches are becoming entrepreneurial coaches who plan to set up practices to serve a unique niche or specialty. In both cases, a clear agreement is grounding to employees and coachees and it's foundational to the alliance you form. As we talk freely about our expectations and our "how-I-like-to-work" items, the people we coach will begin to identify their own. And the alliance grows.

The best agreements are brief and meaningful (then don't look or sound like a EULA) and put your coachee's agenda at the center of attention. Below is a sample to use or personalize with a traditional coaching client.

Some elements to include

1. What's important to you? You may find elements in your DATA coming into play.

- For example, do you like to work in person? On the phone? For thirty minutes? Forty-five? Weekly for several weeks? Ten meetings over three months? What about your fee? And cancellations?
- Will you make coaching part of your regular meetings with reports? How will you talk about that with them?
- For as long as you are a coach, keep an eye on how you like to work and build in the elements that you find help people to make the best progress.

2. If your agreement is to coach, keep that focus.

And return to it when you veer into consulting, managing, telling, fixing, rescuing, propping up or nagging. It happens. As a supervisor, there are, of course, times when you don't coach: You give direction, explain, ask for progress reports and evaluate. There is a built-in power differential. Even so, most of our coaching leaders are finding that when it comes to the development and satisfaction of the people who report to them, agreements to make coaching a part of the working relationship pay off.

3. If you're documenting hours for ICF certification, you can the count actual time towards your 100 hours required for certification if:

- You're coaching (even in 20-minute chunks).
- There's an agreement.
- And you have your coachee's contact information and permission entered into your coaching log. If you're coaching as a part of your leadership role in an organization, you just need the signature of your supervisor.
- Remember, 75 of your first 100 hours of coaching need to be "paid." If you're coaching as a part of your paid employment, those hours count as paid hours.

(There's a digital spreadsheet on [this page of the Coaches' Hub.](#))

4. If you are an internal coaching leader or an external coach who is aligning with manager to coach members of their organization, it's natural for them to want weigh-in on some of the outcomes and to know about key changes that come up.

The agenda will usually include:

- a. The coachee's aspirations and outcomes
- b. Things from their existing or aspirational job description
- c. The requests, values and outcomes from the sponsor or sponsoring organization (the people paying you)
- d. The manager's priorities and deliverables

5. In my own written and spoken agreements with coaching leaders, I include something like this:

"If your/our company is paying me (or asking me to use some of my paid time to coach), I like to find out about your aspirations and outcomes, as well as the values, outcomes and priorities of your leadership. I'll work together with you to get that information and then I like to keep those things in mind even as we place our focus solidly on your priorities.

"My goal will be to dynamically support and challenge both you and your/our company.

*"As we go along, I'll invite your leadership to evaluate our progress periodically via the results they see in your life as my coachee. **But I make sure that everyone knows that the actual content of coaching conversations stays between you and me.** If you're finding it tough to talk with your manager, we can talk about that as an agenda item (i.e. I don't become the messenger)."*

And I include in conversations with the manager something like this: *"You should know that when I'm coaching your team members, they will grow personally and professionally—and sometimes they will grow in the direction of new responsibilities or even towards a new chapter in their career. I can't guarantee that they will stay with you for the rest of their career. I can guarantee that they will be grateful for the opportunity you have provided for them to work with a good coach."*

A Sample Coaching Agreement

(If you decide to have an agreement in writing, personalize something like this. Again, you may find it useful to review my [agreements page](#). And there is copy of this sample agreement on the [Coaches' Hub Module 1 page](#).

My job as a coach is to help you identify and refine your goals, eliminate the barriers that stand in your way and help you take the action to make those outcomes your realities. I'll be keeping an eye on both your long-term "meta-goals" as well as the weekly and monthly steps that will help you get what you want.

Your Contact Info

Name E-mail address Today's date

Best phone/text number

Best mailing address City Zip

Write a little bit about what you hope to accomplish in coaching. This can include scope, expectations of yourself and of me and how we will evaluate our work. We'll use in our first few sessions to explore your hunches together.

Your "Character Strengths"

I have a brief inventory for you to take as we get started together—it will help both of us to understand some of your greatest resources. [This link](#) goes to a free, well-researched questionnaire that will help you to identify your integrated top five (of twenty-four) "Character Strengths." Because this is part of a research project, you will be asked to register, but they won't spam you. Once you click on the above link, click on the button next to "I want to take the VIA 120" and then "Begin the Survey." After you've taken the survey, scroll down to "option 3" and click on "View Rankings Here." Copy your top five "character strengths" into the boxes below. (No need to purchase a report unless you want to.) This inventory is part of research being done at the University of Pennsylvania related to the emerging field of positivity/strengths-based coaching.

1.

2.

3.

4.

5.

Who are a couple of people in your life who track with you (friends, family, colleagues, leaders, sponsors)?

As we begin, I ask that you let them know about your best hopes for development as you work with a coach. Along the way I may ask you to invite their feedback (and encouragement) on what they see in your experiments, changes and even improvements.

FYI

I'm in the process of furthering my training as a professional coach. And becoming certified by the International Coach Federation (ICF) requires that I accumulate hours of supervised practice. Because of this, I'll be asking for your feedback as we work together. I will also be in consultation with my mentor coach and training colleagues about my work with you. As I do so, I will hold all your personal and contact information in confidence.

Once we've committed to work together, I've found that the people who get the best traction and results are the ones who dig in solidly with me for around ____ sessions, meeting every week or every-other week. Then we evaluate. So that's what I ask for as we start our work together.

Costs (if you're coaching externally)

During my training, my fees are temporarily lower. So through _____, my fee will be \$_____ per session. I include in my fee lots of contact between sessions via phone, voicemail, email and/or text messages.

GUARANTEES (if you're coaching externally)

In our work together, you can count on me to be professional, genuine and present as I work with you to make changes. You'll get my best. I can't promise anything about the results you will obtain. Your outcomes will depend on many things.

CANCELLATIONS (if you're coaching externally)

Please don't use email for canceling appointments or for any other urgent message. Just call, leave a voicemail or text me. For cancellations less than 24 hours in advance, I'll make a good faith effort to fill the time, and/or I'll find out if you and I can reschedule within a day or two. Otherwise, I may have to count the time missed as a session and charge you. If you don't show up for a scheduled time, I'll call you. (We can always meet by phone if necessary.) And if I fail to show up for one of our meetings, the next one's on me. I exclude late cancellations due to illness, family emergencies or ice/snow conditions from this policy.

CONFIDENTIALITY AND NON-DISCLOSURE

As your coach, I will do all in my power to keep confidential all communications between you and me. Communication by e-mail and cell phones may not be secure. By signing below, you acknowledge and agree that the use of electronic communication is acceptable. I conduct some sessions in groups, including teleconference groups. If you decide to participate, I ask that you agree to maintain the confidentiality of all information communicated to you by other members of the group or team. Bottom line, I will be rigorous about The International Coach Federation Code of Ethics.

If your/our company is paying me (or asking me to use some of my paid time to coach), I like to find out about your aspirations and outcomes, as well as the values, outcomes and priorities of your leadership. I'll work together with you to get that information and then I like to keep those things in mind even as we place our focus solidly on your priorities.

My goal will be to dynamically support and challenge both you and your/our company.

As we go along, I'll invite your leadership to evaluate our progress periodically via the results they see in your life as my coachee. **But I make sure that everyone knows that the actual content of coaching conversations stays**

between you and me. If you're finding it tough to talk with your manager, we can talk about that as an agenda item (i.e. I don't become the messenger).

SOME IMPORTANT SMALL PRINT

While there are some similarities between coaching and psychotherapy, psychotherapy is a health care service and is often reimbursable through health insurance policies. This is not true for coaching. Both coaching and psychotherapy utilize knowledge of human behavior, motivation and behavioral change and interactive counseling techniques, but the focus of coaching is the development and implementation of strategies that will help people to reach their identified goals of enhanced performance and personal satisfaction. The relationship between the Coach and Coachee is specifically designed to avoid the power differentials that occur in the psychotherapy relationship. As your coach, I will be both direct and challenging.

RESOLVING DIFFERENCES

I want you to be really satisfied with our work together. If, at any time, you feel that your needs are not being addressed, or you are not getting what you want out of our work together, I'll trust you to tell me so we can problem-solve. We will discuss your needs and concerns, make appropriate adjustments and continue to work on the goals you define unless you are ready to stop, which we will do whenever you ask. If you cancel and I don't hear from you within two weeks, I'll assume our agreement has concluded.

☐ Please check here if you would be willing to be contacted as the ICF verifies my time spent coaching with you (they will not ask you anything about the content or outcome of our sessions).

SIGN HERE

The Coachee

Date

The Coach _____

Please make a copy of this signed agreement for yourself and email one to me--or simply bring one to our first session.

Using the Wheel with the People You Coach

If you've done a solid informational interview, you've established some critical bits of information:

1. Are you and this person a match to work together?
2. What are the logistical challenges and agreements to this partnership?
3. Is the personal coachable? (Or is it hard for them to stop wishing you'd just tell them what to do?)
4. And are you beginning to get an initial idea of your coachee's big agenda/coachable issues: What do you hear about their commitment and capacity to take it on?

As you follow their energy, you'll understand how broad/specific their agenda (i.e. their coachable issue) is and how urgent it feels. You'll begin to understand where they are in the change process.

All of this will inform the starting point and direction of your first few conversations. You'll clarify and you'll prioritize and, as trust grows, maybe the agenda will evolve and deepen.

All of this will inform the starting point and direction of your first few conversations.

Through the years, I've found that many people want to begin with an overview before homing in on the place of greatest interest or urgency in their personal or professional lives. Others know exactly where they want to begin. Below are examples of both a general **Life-Flyover Wheel** and a more specific **Big-Agenda Wheel**. Depending on how focused the Informational Interview was, I will send a copy of one of them to my coachee prior to our next meeting.

If you are a coaching leader in an organization, or if a sponsor or employer has hired you, the Wheel may include things like the coachee's job description, the company's values and outcomes or the supervisor's priorities. I may ask a sponsor to weigh in with a question like, "as this coachee and I work together over the coming months, what will be a trend in their performance and presence that will be important to you?" If, for example, you're working with a new people manager, the parts of the wheel will usually include key expectations of the job, what the coachee wants to get better at and what matters with the supervisor. Then the coaching begins with exploration about which first steps are most possible and desirable step in the thinking of your coachee. You listen for how serious your coachee is about committing to those first steps.

As you move from general (*usually a meta-agenda: "I've been in this role for five years. I'm ready for a new challenge."*) to specific (*"I need review finances with my spouse to see what's possible/desirable"*), continuing to listen for hopes and resources, people sometimes surprise themselves with what will help them to create movement (like the man who wanted to move up in his company, but decided that a first step with related to his confidence. He decided to stop smoking).

Sometimes the people we coach start with the low-hanging fruit because, I think, accomplishment gives us humans a surge of energy for tackling bigger things. For example, through the years I've seen more than a few people leave their first sessions with a plan to simply create order in their physical environment, or to pay off a small credit card balance. Low hanging fruit = a good start.

Either "Wheel" will help you to identify both a starting point and the dimensions of the challenge facing the person you're coaching.

The Life-Flyover Wheel

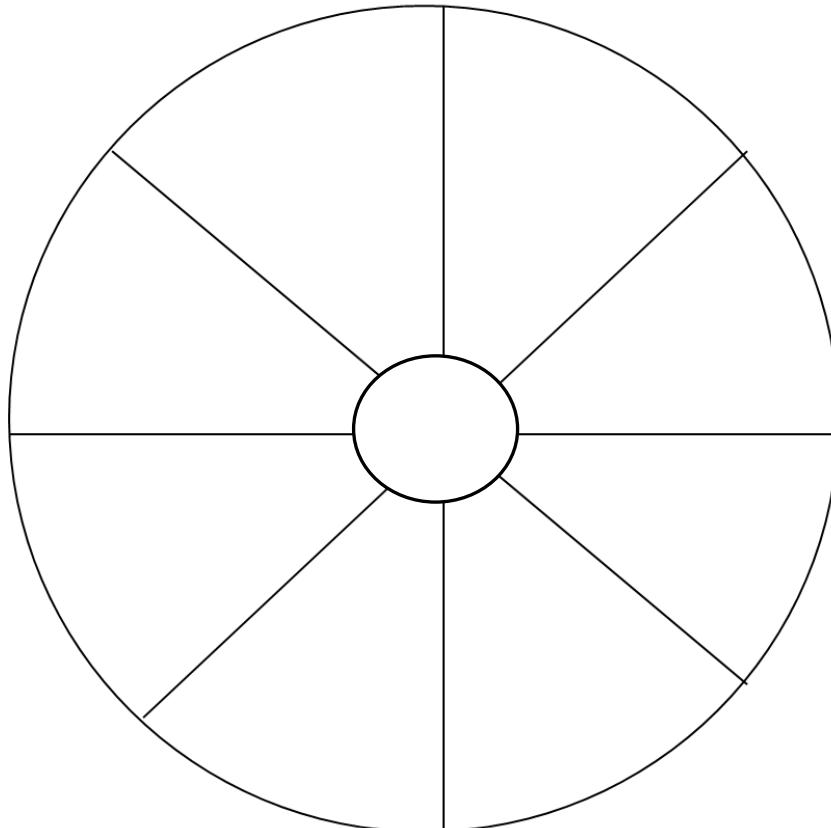
(There's a digital copy on the Coaches' Hub Module 1 page.)

Your Name: _____ **Today's Date:** _____

The sections of the wheel provide a way of thinking about balance and satisfaction through the various parts of your life. Each wedge is simply an area that matters to you, especially at this time in your life. In our first few sessions, we'll look at each and at how satisfying (or unsatisfying) each one is to you at this point in your life.

Take a few minutes to label your own wedges around the circumference of the wheel. And please bring a copy to upcoming sessions. Some sample flyover "wedges" (in no particular order):

- Your career and professional development and path: What are you ready to explore?
- Your current job description: What do you want to get better at?
- Your company or supervisor's priorities
- Building your friendships/support
- Finding a life partner
- Deepening your significant relationships: with your spouse, children, family of origin
- Health and fitness/Spirituality
- Your physical environment and sense of order (home or work)
- Financial order
- Fun and play
- Your "true moral obligations"
- Giving back: An ability, gift or passion to contribute (leadership and organization? Inspiration? Hospitality? Time? \$\$?)



The Big-Agenda Wheel

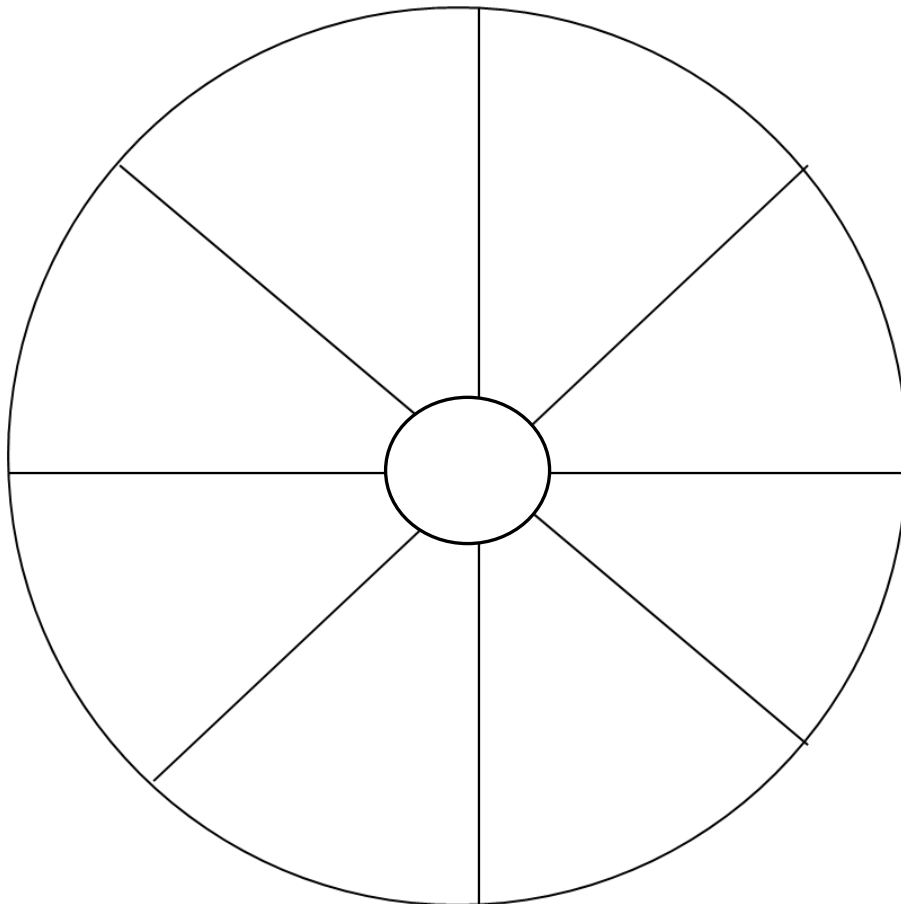
(There's a digital copy on the [Coaches' Hub Module 1 page](#).)

Your Name: _____ **Today's Date:** _____

Some of the people you coach will have a clear agenda already in mind. They are ready to focus specifically. For example, a person who is addressing health and fitness might label his or her wedges: Diet, exercise, support, medical, schedule, etc.

Other “Big-Agenda” hubs that people have brought to their informational interviews: Identifying and developing the capacities that are required for a new job, building a plan for a successful first-100 days in a new job, transitioning to or from something big, maintaining pace and progress with a longitudinal, multi-dimensional project or assignment or building a great team as a team leader. Again, a sponsor or employer—or even a spouse--may want to weigh in on the “big agenda.”

As always, this “wheel” will provide some direction and clarity in your sessions as you continue to build Alliance, Agreement and Agenda. Great coaches cultivate a compass for finding the coachable issues which your coachee finds to be the most desirable and possible. What are they becoming serious about?



Logging Hours for ICF Certification

There's a digital spreadsheet (like the one below) on the [Coaches' Hub Module I page](#).

If you're planning on earning a credential with the ICF, your goal is 100 hours with at least eight coachees, employees or mentees). Twenty-five percent of your hours can be pro-bono/volunteer. That means that, like many new coaches, you have to decide what to charge or, in decisions with your manager, how much of your time at work can be spent in coaching conversations. I like this advice from Seth Godin: *"Begin with the smallest possible project in which someone will pay you money to solve a problem they know they have. Charge less than it's worth and more than it costs you. Repeat. You don't have to wait for perfect or large or revered or amazing. You can start."* And again, you can count an hour for certification if:

1. You're coaching (up to 15 people if you're with a group or a team).
2. If there's an agreement.
3. You're counting the actual time spent.
4. And you have your coachee's contact information (if you're coaching a group or a team, just one contact signature is fine).
5. And that organizational contact has checked the box on your agreement:

- ☐ Please check here if you would be willing to be contacted as the ICF verifies my time spent coaching with you (they won't ask anything about the content or outcome of our sessions).

In your peer coaching in Module I and Module II, whether you're the coach, the coachee or the observer, your actual hours spent with your peer coaches may be counted according to this formula: Fifteen hours can be counted as pro-bono. Fifteen as paid/bartered. So, as with all your coaching hours, you'll want to log them as you do them. You can find a copy of the spread sheet below on [this page of the Coaches Hub \(item #8\)](#). Any additional peer coaching with members of your Cohort or other Cohorts during Module I and Module II can be counted as bartered hours (i.e. "paid"). Following completion of Module II, you may count peer coaching hours as bartered/paid. And any peer coaching you complete in our [Advanced SeattleCoach Cohorts](#) can be considered "bartered/paid" hours as well.

You don't need to submit your log with your ACC application. But it's a "best practice" to keep it current as you track your progress (and in case the ICF picks you to audit).

SEATTLE COACH® CONNECTION. CURIOSITY. CHALLENGE.		Logging Hours for Your ICF Certification						Count the time you spend coaching if:	
		The goal: 100 hours (75 paid) of coaching experience with at least eight coachees.						1. You're coaching. 2. There's an agreement. 3. You're counting the actual time spent. 4. You have your coachee's contact information and they have given permission for the ICF to verify the time spent coaching. (You'll want to set that up in your agreement.) 5. If your organization has a confidentiality policy or you are coaching for a third party organization, additional documentation is required. See "Experience Requirements" on this page. https://coachfederation.org/icf-credential/acc-paths/ (then click on "ACC ACSTH Path")	
Coach Name:		Click here for ACC Application Requirements							
Coach Contact Info:									
Coach Name	Coach Contact Info	Indiv/Group? *15 (max in group)	Start Date	End Date	Paid Hours	Pro-Bono Hours	Do you have permission for ICF to contact either the coachee or the org. contact for verification?		
Peer group: John, Alex, Cindy Katherine	One person's email address. (This row shows how you would log hours for your homework groups.) Katherine's email address	Group: 3 individual	9/13/2016 7/5/2016	12/5/2016		4	yes yes		
Local Hardware Store Employee	Either your coachee's email address or the biz owner/sponsor's email address	individual	12/15/2016	7/22/2017	10		yes		
Local Hardware Store Managers	Owner's email address (she's paying for a coaching off-site)	Group: 6	5-Nov	5-Nov	6		yes		

[Click here for the ACC Application requirements \(you'll use the "ACC ACSTH Path"\)](#)



(I keep a secure folder for each person I coach and attach a hard copy of this log to the outside of each one. You can find a copy on the [Coaches' Hub Module 1 page](#).)

© Patricia Burgin, MA, MCC, 2020-21 | *SeattleCoach: Curiosity. Connection. Challenge.*® | www.seattlecoach.com

Coaching Through Change

Coaches are specialists in understanding and fostering human change. We make it easier, more possible. We help people to identify and get over their stuckness, fear and inadequacy. We help them to move and grow through it. And when we recede into the background of their lives, we leave them with the beginnings of their own inner coach. A good coach can change a lot.

Most people who hire coaches are trying to change their lives. They know that the world favors rapid learning, resilience and collaboration. Our job is to help them to make their transitions easier, more thoughtful, sustainable and even enjoyable and life-giving. Think of coaching as a way of delivering highly customized and interactive, just-in-time, adult learning and leadership development.

If you're like me, you've walked through a few wildernesses and addressed some big and lasting change in your own life. Sometimes we volunteer for change and have time to stage it. But you know, probably from experience, that sometimes change tosses us around, like a kid in the breakers. However change comes, as coaches, we help people think through the most important things: *What to expect and pay attention to, how to hold steady in the process, how to think about obstacles (and those little hecklers and resisters in your head) and how to talk about it along the way to family and stake holders. What will happen next?* Coaching can be a course in wilderness survival.

Our job as coaches to help people to get more curious and awake to what they long for, discovering, testing and creating action and finding their next step. Sometimes what seems like a great idea is “just not right.” If it’s “not right” then why? The answer might be where it gets brilliant. Something else—better, deeper and unexpected—might come to you. The process is about paying attention, exploring, testing and learning in ways that are both focused and well-paced.

As you co-create your alliance with a coachee, one of your first questions is some version of, “*What needs to change?*” or “*What is changing?*” and “*What are you hoping for?*” Sometimes the answer is in the category of “first-order change,” i.e. something the coachee is already doing needs to change (more of? less of?). For example, the talented new leader who is developing her competencies. First-order change is always reversible.

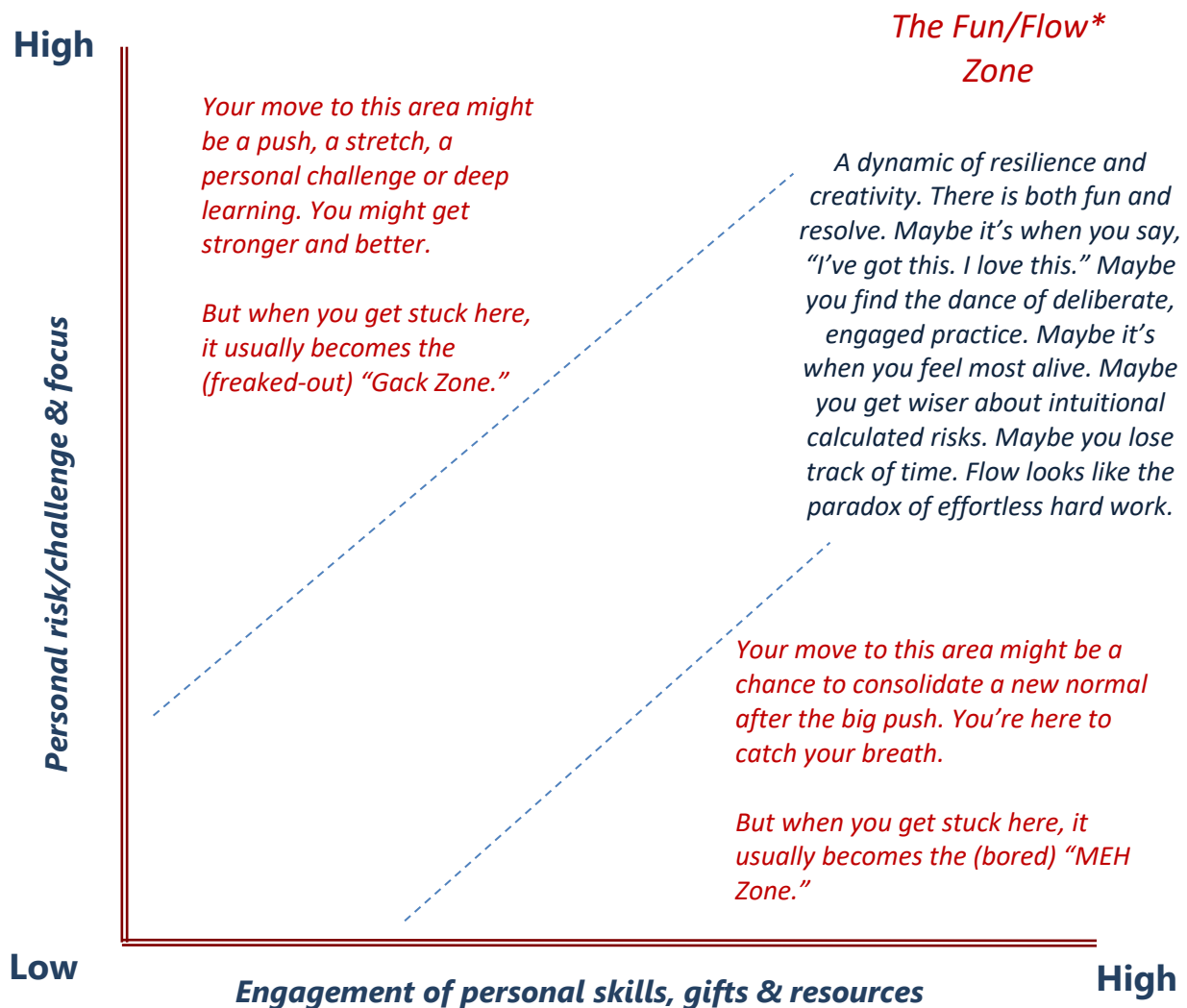
Sometimes the coachee’s answer is about a “second-order change.” Second-order change requires a new way of seeing things and maybe even of being seen. It’s irreversible and a new story begins to emerge. For example, my friend who had been a Roman Catholic priest for twenty years and then, as a man of faith, decided at forty that a greater calling for him was to be a husband and a father (and he hadn’t even yet met his future wife!).

Think about a time when you experienced second-order change. Maybe it was voluntary, maybe not. Maybe it was wonderful. Maybe it was terrible. Either way, you knew it was an earthquake and a one-way door. Maybe after you calmed down, there was likely a profound sense of grace and acceptance. Many people report that they pray during times of second-order change. When you think about your own experience of this time of quantum change, how could a coach have helped you?

There are many “change models” out there, many of which focus on the problem, the process or the organization. We focus on the person. Their hopes, stuck places, resources and desired outcomes. The following two models will help you to think about how humans can change their brains and their lives in ways that are both powerful and deliberate.

Model I: Finding Fun & Flow

As you work people, you help them to find next steps that honor their goals and challenges as well as their interests, aptitudes, assignments and resources. Flow is a dynamic target and one of my hopes for everyone I coach and lead is for them to become skilled at consistently finding it for themselves.



Read more about it . . .

Patty's take on [Flow: The Psychology of Optimal Experience](#). 1990. Mihaly Csikszentmihaly.

"A flow state ensues when one is engaged in self-controlled, goal-related, meaningful action."

Model II: The Transtheoretical Model of Change

This second model of how human brains successfully approach and metabolize change is based on the idea that people move through a series of stages when they are changing their behavior. Think about some big change that you've moved through: A new leader? Becoming a new leader? Recovering from a break-up, or an addiction or learning to live in a new country or culture. We all know that important and sustainable change happens over time. Change isn't usually linear, however there are key questions and tasks related to each "stage" as one's clarity and confidence grow.

When a coaching leader thinks about "stages of change", their coaching alliance explores what is possible? what's desirable? What are they willing to commit to? Coaching leaders navigate the stages with both individuals and teams as they move through change, or even a new way of thinking or working together. Is it time for more safety and support and contemplation? Or is it for more challenge and truth and action?

How quickly do people move through the stages? It varies of course and progress is related to the signal strength of an excellent coaching relationship.

You know from using The Wheel that it's normal for people to hold several points of transition and growth at the same time. As you help your coachee to focus on the area that is most fruitful and accessible, you will likely find them in one of the following stages. Not that anything is ever completely linear.

These are the stages of change in James Prochaska's "Transtheoretical Model." Below each stage are a few of my comments about the markers I look for and the questions I ask.

Stage 1: Precontemplation

In precontemplation, you haven't yet decided to make a change. At this stage, you are not ready to just do it. You may even be resistant, demoralized and underestimating the benefits of change. But something compelling (and maybe scary) is on your horizon.

You're thinking: *"I don't know . . . I've tried . . . I don't see how . . . I don't need to . . . change would be costly."*

Your coach needs to be gently curious, to roll with resistance, to normalize "recycling" and to notice the evolving balance between pros and cons: What's bringing this up for you? And why now? What if? What are you saying to yourself and how are you saying it? When pros begin to outweigh the cons, you're moving into . . .

Stage 2: Contemplation

Now you're seriously considering making a change, but you're not ready to start yet. The pros and cons of change are pulling even, but there's still ambivalence. You're moving toward deciding, maybe intending to act in the coming days or weeks. Your next step is planning. If you keep sliding back to the contemplation stage, it's probably because you flung yourself straight into action too soon. (This is where a lot of people call on the services of a good coach.)

You're thinking: *"Hmm. Maybe I need to . . ."* You're debating, compromising, expanding, contracting. Maybe you just want to process out loud with someone safe.

Your coach asks: What you see when you “play it out”, how does each side line up with your values? What would this require of you, your strengths and resources. What are the obstacles? Who will you tell? What are you saying to yourself and how are you saying it? As your “slow hunch” grows toward certainty, you’re moving into . . .

Note to coaches: When you’re coaching someone who is in contemplation, the “experiment” you land on will likely be, well, contemplative: *“It sounds like you process things when on your walks (when you journal, pray, talk to your spouse . . .). Would you be willing to do that daily between now and the next time we see each other?”*

Stage 3: Determination/Preparation

In determination/preparation, the balance between the cons and the pros has tipped towards the pros. You're planning to act soon.

You’re thinking: *“I need to consider how I’ll do this. It’s time. I will. What could I do? What will I keep?”* Starting to be determined and willing, ready to take the first steps to test and learn.

Your coach starts to ask about the potential specifics of your plan: What will you do? What do you need? Who will be in your corner? How will you know when you’re ready to take action? What needs to be tested so you can learn more? What obstacles do you see? What are you saying to yourself and how are you saying it? How will you make your environment conducive to your plans? What will your rewards be?

Stage 4: Action

Now it's time to "just do it." You’ve counted the cost, built some support and grown in your commitment to the change. This is likely a lengthy period of creating and sustaining the change you’re ready for. Maybe it’s a new life-long habit.

You’re thinking: *“I’m starting to make changes. Why’d I wait so long? This is hard—and worth it.”* You are active, reflective and energized and accepting.

Your coach engages with you: What needs to happen this week? What will you pay attention to? How will you know if this moves you in the right direction? How will you handle setbacks? What are you saying ‘good-bye’ to? Making more room for? What are you saying to yourself and how are you saying it?

Note: At this stage, it’s not uncommon to “relapse”, to “push the pause button” and to re-evaluate if all this investment of time and energy is really worth it. How can you help your coachee to anticipate this part of the process?

Stage 5: Maintenance/Consolidation

It begins to occur to you that you’ve created and begun to sustain a new normal. It’s been a few months and you've realized you can do this. The pros are obvious at every level.

You’re thinking, *“Wow. A new normal. I don’t want to let this go! I want to keep working and building.”* You’re feeling accomplished, steadfast and optimistic. Speed bumps don’t throw you off.

Your coach works with you on the kinks and helps you to pay attention to your well-earned benefits: What are you noticing? What do you continually need to move out of your way? What do you love about this new-normal? What are you saying to yourself and how are you saying it?

Stage 6: Evaluation and then, the pause button? A new challenge?

You've done it! You're steady with the new-normal. You've made a significant change and developed the skills, decisions and support to sustain it.

You're thinking, I don't want to let this go, I know what to expect and know how to be resilient with whatever comes.

Your coach joins you in celebrating the character and behavior you've demonstrated: What have you learned about how YOU create and sustain change? What are you contemplating now? And, (as always), what are you saying to yourself and how are you saying it?

And the cycle continues in both coach and coachee. This is rarely a straight-line process for human brains. And it's rare that we have just one agenda in play. Be prepared to normalize returns to earlier stages and maybe growth into new and unexpected directions as the possibility of change opens up for your coachee. Our job is to recognize, accept and to continue creating engagement and safety. *(And if you get frustrated, remember to consult, to practice self-coaching/self-management and to remember that "imposed" change asks for compliance and has about a 25 percent success rate over time in bringing lasting transformational change.)*

Read more about it . . .

[Mind and Nature: A Necessary Unity](#). Gregory Bateson. 1979.
[Changing for Good](#). James Prochaska. 2007.

In Module II we will deepen our conversation about the centrality of the Stages of Change in coaching.

Gradually, Then Suddenly: How Coaching Works

(I give a copy of this to each of people I coach)

There is a much-quoted moment from Ernest Hemingway's The Sun Also Rises in which a character explains how he went bankrupt. "Two ways," he says, "Gradually and then suddenly."

We've all experienced it. Physics calls it the *tipping point*. A Buddhist proverb says, "When the student is ready, the teacher will appear." Jesus talked about acquiring "eyes to see and ears to hear." Lillian Hellman wrote, "Nothing, of course, begins at the time you think it did." My grandfather talked about "the last straw."

If you're like me, "Suddenly" can be a quiet dawning or a jarring moment of truth. "Suddenly" can happen in your own awareness, or if you wait too long, it can slam into you from the outside. It can be an epiphany or a moment of dread, or just a quiet conviction that something must change. For example:

- *Gradually, I've taken on too much at work and all of a sudden, (a) I'm mad or (b) things are imploding*
- *Gradually, I've wanted to volunteer more and out of the blue, this non-profit comes looking for me*
- *Gradually, I've put on weight and all of a sudden, my chest hurts*
- *Gradually, what I really want to do more of in my work has come into focus*

Recently I heard a common "gradually" from a new coachee: "Gradually," he said, "I've gotten restless in my work. I know I'm capable of far more contribution and satisfaction. I've thought about hiring you for a while and this is the right time."

In the four months that followed, this coachee and I met together ten times. He took a hard look at a gradual and unsatisfying trend in his life and work and then he began to bend the trajectory of his life into a new direction. He found a new job and along the way he clarified and learned to talk about *what* he wanted (more of, less of, same as) and *how* he wanted to begin showing up with colleagues, new bosses, new teams and even with his family.

Then this note came from him, "I am super excited to move into this role--and I cannot thank you enough for everything that you did to help me get to this point. Without your coaching I feel I would have been spinning in circles trying to decide what I wanted to do, bringing more frustration to myself and my family."

He's very gracious and I'll enjoy working with him any time he's got a new "coaching agenda" in the future.

However change comes, I work with people and organizations to help them think through what happens next: What to expect and pay attention to, how to hold steady in the process, how to think about obstacles (and those little hecklers and resisters in your head) and how to talk about it all along the way.

A first question any good coach will ask you is some version of, "What do you want to work on, leave behind, do more of, do less of or get better at?" You may have responses from more than one area of your life and your spouse or team probably have their opinions. Sometimes when I ask, "What do you want to work on?" I hear a hunch or an idea that's just forming. Sometimes I hear pain. As we refine the agenda, the essential experiments begin to be clear.

Coaching is famous for helping you to discover, test and learn. Sometimes, the process isn't very linear. Sometimes you find out that what seems like a great idea is just not right for you. If it's "not right" then why? The answer might be where it gets brilliant. Something else—better, deeper and unexpected—begins to be

clear. The process is about paying attention, exploring, testing and learning in ways that are focused, clarifying and well-paced. The process includes both courage and accountability.

Gradually, then suddenly. What's gaining on you? If you're like most of the people I coach, you'll find that a season of professional coaching can be a crucial pilgrimage in the middle of a cherished and all-too-short life.

Maintaining Pace and Focus: The Focus Form

At each step of the way with the people we coach, from the informational interview to the Wheels to the coaching agreement, a big part of our job is to keep a clear focus on their agenda and outcomes and on the pace of our work.

That's partly the job of our coachees too. If I do my job well, the people I coach are learning to coach themselves between our sessions. In my coaching agreements I encourage my coachees be in touch as needed between our sessions—and especially in the twenty-four hours prior to one of our meetings.

Sometimes they do that with a catch-up email, sometimes they take a few minutes to fill out and return to me a focus form like the one below. Though the focus form helps us as coaches to prepare for a session, the main purpose of the focus form is to invite your coachee into a reflective conversation with themselves before they come to the one with you.

I've customized my focus form to include:

- My coachee's signature strengths—so that both of us stay reminded of them
- Some focusing questions
- A question about our pace (mostly because I can get enthusiastic and fail to explore deeply enough the motivations and opportunities for increased awareness that inform my coachee's next steps)
- And finally, a very specific question about where they would like us to focus next

Of course, life happens between sessions—even in the final twenty-four hours, but a focus form—or something like it invites both coachee and coach to take a moment to reflect and prepare. And when that happens, coaching conversations get more interesting and useful.

If my wish isn't granted and I don't receive something prior to our meeting, I simply take time at the beginning of the session to explore the same questions. The benefits of the focus form are first, the potentially rich reflection time people can find on their own and second, the way a coaching partnership can quickly find its traction.

As with all our tools, feel free to use the one on the next page or to create your own.

A Sample Focus Form

There's a digital copy for you to personalize on the [Coaches' Hub Module 1 page](#).

*"People don't usually stumble on success, they choose it,
over and over, in thin slices."*

Please send me an update the day or two before each of our upcoming sessions. The purpose of this is two-fold: The first is for you to have a check-in conversation with yourself. The second purpose is to give me a preview of what you will be ready to work on when we meet. Please start by reviewing your top five strengths from the assessment you took when we began. I'm always curious about how you will use those strengths as you pursue your goals in coaching. (The link to the "VIA Character Survey of Character" can be found under "Temperament Assessments on the right side of [this page](#).)

- 1.
- 2.
- 3.
- 4.
- 5.

And these are the "focus" questions (answer only the questions that interest you--even if they're not mine):

In coaching we keep an eye on both your big-picture, vision, goals (e.g. *Finding more balance, a career or life transition, being more energized, connected or essential*) as well as the crucial steps and learnings that will get you there. In a couple of sentences, see if you can say a little about either--or both.

Do you have any beliefs or assumptions that you're gently testing?

Is there anything you are especially grateful for or curious about?

What do you need?

What is standing in your way? Things you're doing or not doing? Missing resources? Old habits and stories? Critical voices? Competing commitments?

What's getting better? Where did you see a bright spot in your work and relationships this week?

As we balance exploration with action in our partnership, how's our pace?

- ☐ "Let's go!"
- ☐ "Whoa! Slow down!"
- ☐ "We're in the Goldilocks-zone (just right)"

In our next coaching conversation, what is the "next slice" you want us to focus on?

Key Skills and Behaviors for Practicing the Playcard

Part 1 / Co-creating a Level III Conversation

In the way we listen—not only to content, but to another’s voice, breath, tone, mood, non-verbals and posture—as coaches, we inspire a different kind of conversation. If **level I** conversations are transactional and **level II** is an exchange of points of view and data, **Level III** is a co-creation. An alchemy. As coaches, we cultivate the ability to listen to our own lives, to the thoughts, emotions and hunches of others and to the larger systems of which we and they are part. With these skills, you “double click” on the richest possibilities.

Saying what you see and hear. Every human has a way of saying, *“Don’t miss this!”* Sometimes it’s verbal. It always has non-verbal elements. Coaches listen beyond the words to the shifts right in front of them—for beliefs, energy, mood, behavior, voice and postures. This doesn’t mean you paraphrase, interpret and diagnose. You simply notice, *“Your voice just got really soft.” “You just teared up.” “You just moved to the edge of your seat.” “What just happened?” “What’s going on in your thinking?”* (Then, wait for it . . .) In the words of Alice Miller, *“You can listen like a blank wall or like a splendid auditorium where every sound comes back fuller and richer.”* What else is going on here? Saying what you see and hear may be the most connected and immediate way of giving useful feedback to your coachee. And as you do, you will likely inspire your coachee to listen with more grace and clarity to their own life. And when they do, their voice and even their performance will reflect it.

“Reset” / Finding the focus. When you’re hosting a special meal, you set the table with some care and then, as everyone gathers around it, you do something to mark the moment. Maybe you propose a toast. Or say grace. Or maybe you simply smile at each of the faces looking at you as you begin and thank them for being present. Similarly, at the start of a coaching session, a good coach takes time to set the table for a safe and generative Level III conversation. I’ll often ask my coachee to briefly **“take a moment and catch me up.”** Or maybe I’ll invite them to **“catch their breath”** (physically and emotionally) and check in with themselves” as they finish arriving from a busy life. Then I’ll ask, **“Where would you like to start?”** (*Where we left off?” “That item from your focus form?” “Something else?”*)

Clearing the deck. When a coachee shows up with some news about the results of a personal experiment, or something else immediate or emotional (maybe they’re scared, disorganized, mad or excited), or when there’s something big in the news, what will you do? Maybe there’s a lot going on “below the water line.” Maybe a little longer neurological or somatic reset—or a release valve is in order. When you “clear the deck,” you patiently and supportively make some extra room: **“Would you take a breath and five minutes and tell me what’s happened? What is this like for you?”** At the end of five minutes, check in with your coachee, **“What do you think, do you want to return to/keep going on what we were working on? Does this thing on your mind need more attention?”** Sometimes the “clearing the deck” story changes the agenda you’d planned on, but usually that’s your coachee’s call.

Finding the right pace. As you set the stage for trust and success, you help the coachee to articulate and manage their agenda, pace, the stage of change and their markers of progress. In addition to your growing alliance and safety, tools like the informational interview, the Wheel, your written agreement/contract and the Focus Form, will help you to co-create the right pace.

Clarifying focus. The coach’s focus is not on being right, it’s on finding the “thread” and being open to surprise, learning, not-knowing, correction and co-creation. What is possible in your coachee’s thinking? What is priority? What is urgent? What are they hoping for? Cultivate a learner’s mind. Can you be OK with not-knowing? **“You sound ready to take this on. Did I get it?” “What would be different?” “What if you don’t?”**

Meta-view. Expanding a perspective that has become cluttered or unclear. The meta-view can be a balcony, a time machine, or simply, *“Could we take a step back?”* (Find one you like to use.)

Metaphor. A good metaphor (or is it a simile?) shoots off associations and learning like sparks. The best ones come from the people we coach and are like floodlights. We recognize how they rhyme. The coach just has to listen for them and then use them. One of my coachees, a novelist stuck in writer’s block said, *“It’s like I’m trying to start a fire and I’ve got a big log, but no kindling.”* She inspired a great coaching conversation.

Time-out. I know, your mom told you not to, but this is a gracious (never-impatient) interruption. *“Could I stop you? Do you believe what you just said? It had the ring of truth.”* With a time-out, you help your coachee to wake up to the core of their story, or to moment in which they say or do something important or even exceptional.

Bottomline. Sometimes a coach calls a *“time out”* to ask a key question: *“Can you give me the essence of what you’re saying?”* I use this skill (again, never with impatience) when I begin to wonder how a coachee’s long explanation is related to their agenda. (Or is it?) A coach I know challenges his coachees to *“stop talking and say something!”* Then again, maybe the story needs to be told.

Reframing. Let’s say you’re walking down the street and you pass a friend. Normally, your friend would greet you warmly, but today they don’t even acknowledge you. What is the emotion you feel? Lots of options here: Anxious, angry, sad, offended, surprised, curious? And what meaning do you attach to that emotion? What is the conclusion you draw? And then what do you do? It’s easy for human brains to follow the *event-emotion-belief-action sequence*. Do you take a moment to explore the possibilities? Or do you act, maybe unhelpfully, on an unexamined emotion and belief, or maybe an old story that has nothing to do with your friend?

A good coach invites and makes time for examination and for potentially alternative conclusions and explanations (this includes *metaview*). Maybe we ask, *“What do you make of that? . . . What did you learn? . . . What will you do next?”* You remember that critical voices (See **Part 2** below) get busy with unexamined emotions, so you stay gently curious about that event-emotion-belief-action sequence: *“Is this about you? Is this always how it turns out for you? What was missing this time?”*

Sometimes the narrative (explanation) we or our coachees come up with isn’t the truth. Sometimes the truth is just the hard, complicated truth.

Reframing doesn’t mean you become a Pollyanna or that you fail to faithfully and bravely offer a hard truth (see **direct communication** below). As with many coaching skills, when you challenge your coachee to courageously reframe, it might become their skill too.

Level III questioning: The French novelist Honoré de Balzac said, *“Power is revealed not by striking hard and often, but by striking true.”* This Key Skill is in RED because questions that are big enough to matter, asked well, are at the heart of great coaching. Notice, it’s not just “questions” it’s **Level III questioning**: Your best questions as a coach don’t come from a memorized list (though you may have a few favorites), rather they are informed by the conversation itself and by the way you listen. Level-three questioning deepens the coachee’s awareness. The best questions are open-ended, direct and to the point. Then be quiet and wait. Don’t give up on your question while the person you’re coaching is thinking, even wrestling with a new layer of awareness, or with something they’ve avoided. Maybe ask again. Or *“What else?”* Powerful questioning is focused on what will happen next and rarely feels like interrogation: *“What do you need to know to make the decision?”* is more useful than, *“How did that make you feel?”* Or *“Why did you do that?”*

Level III questioning promotes discovery and isn't leading: ***"What do you need to do to take care of yourself this week?"*** (asked gently) is more useful than, ***"Would it be helpful to take a day off?"*** (which is really a bit of advice). Sometimes a great coaching artist sounds as curious and immediate as a fourth grader: ***"How'd you do that?!"*** Another great artist, Pablo Picasso, pointed out, ***"It took me four years to paint like Rafael, but a lifetime to paint like a child."***

An **inquiry** is simply a transformational question offered, (usually gently) or restated at the end of a session, for continued reflection: ***"The big question I hear you contemplating today is, 'What if I don't do this?' Would you notice your emerging hunches about that over the coming days? Could I ask you about that next time?"***

Part 2 / Exploring Resistance

Resistance is always full of information. When coaches learn to listen for it and to explore it for meaning, the partnership deepens. Does the resistance come from inside? From outside? Is it true and useful? Is it false? Is the caution you hear helpful? Or is your coachee avoiding something important? Some common possibilities:

- What old stories, processes, feelings, structures are in play? *(The coachee: "I've never been very organized.")* Maybe you've found a growing edge to explore.
- What resources are missing? Internally? Externally? *(The coachee: "I want to apply for this job, but there's an item on the job description that I've only got limited practice with.")*
- Where is this person on the change scale? What's happening with their balance of pro's and con's? Maybe this is a useful caution. *(The coachee: "I'm just not ready to go public with this yet.")*
- What are his or her competing commitments—and resulting beliefs? Is this a problem to be solved, a choice to be made, maybe a conviction to be honored or is it just one of the zillions of polarities we dance with in the course of life? *(An entrepreneurial coachee: "I want to be gracious and compassionate in serving people--and charging enough money is hard." Or, a CEO, "How can I keep our 'go-for-it!' business model and at the same time, develop my team to lead like coaches?")* What's the embedded belief? Can it be challenged? Should it be? If the resistance is rooted in a clear and unwavering personal conviction, how will that conviction inform the agenda going forward? For more on this one, listen to this fourteen minutes with Robert Kegan as he talks about **"immunity to change."**
- Finally, are there **self-limiting parts** in play?

Raise your hand if you've ever been misunderstood or dismissed, failed or felt clumsy. If you've ever come close to panic just before a big performance moment. If you've ever trash-talked and shamed yourself when your performance was a disappointment. If you've ever lectured yourself about being an imposter or too needy in a time of overwhelming challenge. If you've ever felt too self-righteous to grant forgiveness to someone. If you've ever felt too ashamed to receive forgiveness. If you've ever felt like you're fabulous just as you are and don't need to change a thing, that the status quo is always the best option.

If you raised your hand, you're normal.

Each of us has a true voice, a true self, a you of you's, an essence, a soul. And we also all have "parts." You know, those other voices in your head that get busy when you grow or risk or attempt change. In a zillion different ways, they try to help by bubble-wrapping you with excessive fear or caution. Or maybe they shame or accuse

you to the point of burn-out or inaction. Each of your “parts” probably has deep roots, decades-old ways of insulating you from the potential pain and hardships of growing.

But here’s the rest of it: your parts have information and talents. And each part even has the capacity to heal and grow, and maybe to become more helpful. Or maybe to retire. Maybe you’ve experienced that.

In some schools of thought, therapists and coaches have created assessments and formulas and approaches that are intended to externalize and banish those parts (aka saboteurs, critical voices, gremlins, judges and “automatic-negative-thoughts”) and, in their places to invite and fortify inner heroes and sages.

Through my years of ministry and therapy and now coaching, my approach is a little different. In my faith tradition, the opposite of bad behavior isn’t good behavior. It’s connection, forgiveness, re-engagement and, often, healing. We may think we want to be strong and self-contained at all times, never needing forgiveness or support, but change is more likely when we let good people see and love and even enjoy our growing edges. When we’re whole, and our faults don’t dissuade them from caring about us. What if it works that way with these parts that badger us?

I know that our parts get busiest and loudest in times of risk and performance and disappointment: when we get so sad or scared or mad, we don’t think anything will ever be different. When I hear one of those voices in myself or in one of my coachees, rather than banish the voice, I try to get curious about it. Remember?

Resistance is always full of information. No matter the agenda, our job as coaches and coaching leaders is to help people to learn the sound of their truest voice, but to listen as well for what their parts have to say. This is far more interesting than trying to work with an imagined hero or sage.

I was working recently with a coachee I’ll call Lauren. Lauren has accomplished more in one lifetime than you can imagine. Now, she’s hit a rough patch and this time, she said to me, quite emphatically, *“I just need to buck-up!” “I just need to do something!” “I try to be brave.”* As I listened to those emphatic statements, they just didn’t sound like Lauren’s true voice. They sounded like the words of a tireless taskmaster. Probably since childhood that part had labored to protect her.

But then, Lauren took a breath and with tears in her eyes, her voice changed from harsh to soft and calm. She confessed that *“it feels like my head is underwater and as soon as I come up for air, I get dunked again.”* I leaned in and asked gently, *“Are you just imagining this rough patch?”* *“No.”* She said, *“It’s real.”* She got quiet and then looked up at me and said, *“I haven’t gotten to know fear very well in my life. But I do know how to comfort my grandchildren when they’re worried.”* In that moment I think I heard Lauren’s true voice. And I told her so. And then I said simply, *“I’m right here.”* Then together we got curious about that tireless taskmaster, “Ms. Buck-Up” (we gave her a nickname). *“Why do you think Ms. Buck-Up is so worried? What if you did just buck-up as usual? What if you didn’t?”*

Through the remainder of our session, four things happened:

1. We asked Ms. Buck-Up what she wanted us to know about herself. She gave us some useful information about her job description. There were some old hurt places, stories and demands from which she habitually tried to protect Lauren. Ms. Buck-Up behaved the same way today as she did when Lauren was twelve years old. We asked Ms. Buck-Up what would happen if she didn’t keep doing her job.
2. Then I asked Lauren, *“Is there anything you want to say to “Ms. Buck-Up?”* Lauren had the experience of offering some appreciation to Ms. Buck-Up. *“Thank you. But I know far more about being wise and safe now. If your job changed in my life, what could you do instead?”*
3. We both got the impression that Ms. Buck-Up might evolve and step back into Lauren’s life with more useful and up-to-date strategies.

4. Lauren and I left time to debrief. We talked about how Lauren could stay with her true voice and even share a few things with her husband. We co-created a plan for what she would do if she started to second-guess herself and experience an “emotional hangover” that evening.

I had a friend who used to work for the U.S. Treasury Department. As a part of her training, she had to learn to identify counterfeit money. “*What did you learn to look for?*” I asked. She smiled and said, “*We mostly just got very familiar with the real thing.*”

Lauren is learning the sound of the real thing, of her own true voice—her own “deep-down” that, with luck, with will grow until the last breath she takes. This may be where spirituality comes in. Life is short and life is big and if you’re willing to face yourself and to grow, to stay safe enough and to listen and forgive and be forgiven, your “deep-down” voice gets more resonant, more reflective of both grace and truth with both yourself and with others. You start to hear it more distinctly. Two ideas:

1. Listen for the tone of your true voice. If you believe in a loving God, that voice will usually be congruent with your own true voice (in my experience, good theology syncs with good psychology): It is specific, calm, constructive, respectful, gracious, truthful, timely and life-giving. Ask yourself, “***Does this voice support and challenge me to get to where I want to go?***”
2. And second, if you’re scared and doubting yourself, maybe there’s a reframe. Maybe your concern points to something you deeply value or need to learn. For example, that upcoming workshop you’re working on. I bet at least part of your over-preparation comes from how deeply you want to bring great work to your team, employees or coachees. Take a breath and let that truth become primary. Is this a caution you can use? Maybe just reassure that part that occasionally thinks you’re still twelve years old that you’ve got this. Then get back to work that’s big enough to matter.

Yes. Resistance is always full of information.

Part 3 / Finding the Next Step, the Experiment

People hire us to help them to create specific, actionable movement in their lives. Vague aspirations may feel safe, but they’re not very useful. As you explore what’s possible and desirable in your coachee’s heart and mind, get curious in your own way about things like: “***What part of this can you do now? What can you fix or keep? What needs to end or be left behind? When will you do it? Whom will you tell? Do you have enough of a plan?***” Talk about the role of accountability in coaching in your first few sessions. Like the word ***feedback***, your coachee may have an unhappy history with the word ***accountability***. In coaching, accountability simply means that we’re taking our coachee very seriously, caring deeply about both what they say they will do as they move forward and how they will do so. Given a solid and growing alliance, our job is to is to graciously and steadily track with what they say they want and will do.

Your coachee will begin to pay attention to potential next steps as much as you do. As negotiated experiments emerge, I tend to get curious about them both at the close of a session and at the start of the session that follows. And when the person I’m coaching “fails,” I might ask, “***What did you do instead?***” or “***What are you saying to yourself about that?***”

Leveraging the coachee’s values, strengths, energy. The coaching partnership assesses, explores, understands and builds on these things in the service of the agenda and next step. Assessments fit with this skill, but they are always supplemental to the work that happens between coachee and coach. A good assessment doesn’t provide answers as much as it points towards what to explore with individuals and teams. (If you use one, find out if you first need to be trained in its use.)

Using the bright spots and defining stories of the person, group or team you're coaching. I know, I know. Coaching is more about the present and the future than a trip in the way-back machine. But, as the old Irish saying goes, ***"The thing about the past is it's not the past."*** And there are times when a glance back fuels a person's gaze at his or her next steps. Each of the people we coach has defining stories about times when they overcame a challenge and found out what they are capable of. These are the unforgettable, even searing experiences that underscore values, character, effort and strength. They may also have stories that are ready for new meaning: It's not what happened to you, it's how you make sense of what happened to you. I use this skill with teams when I ask members to tell a story about one of their defining moments growing up—a story that still informs and energizes the way they show up today. Again, think "gaze-glance."

Requesting / challenging. The coach offers the coachee a specific request or challenge or powerful question based on:

- The possibilities and goals that the partnership has explored in the session, or
- On the coach's own wisdom and experience. This isn't the same thing as giving advice, because the coach invites evaluation and leaves the authority for the next step with the coachee. For an excellent example of a coach-flavored psychologist doing this, listen to [this TED talk to people in their twenties by Meg Jay, PhD.](#)

A good request or challenge is specific and sometimes it's an uncomfortable stretch. But it's not an assignment--the coachee isn't obligated to grant the coach's wish. Instead, ask your coachee to consider the request/challenge and then to respond with a ***"yes," a "no" or a counteroffer.*** Sometimes a request/challenge is simply a powerful question, asked graciously. A question that exposes more truth. ***"I have a big question here. Is it OK if I ask it?"*** This is not the same thing as "assigning homework" (which I don't do).

Brainstorming / edge-storming. Use this skill when your coachee gets stuck. It's a way of exploring the possibilities of ***"what a coachee didn't know that they knew,"*** new possibilities, of challenging the boundaries of your coachee's known world. Edge-storming is a little like brainstorming but focuses more on expanding the coachee's comfort zone and depth of experience and expertise rather than going completely "blue-sky." Think, ***"A ten percent shift."*** When I use this skill, I invite the person I'm coaching into a couple of minutes of creative back-and-forth with me (***"you could . . . , I could . . ."***).

A tangible metaphor. As your coachee identifies a strength, a gift, a relationship, an aspiration, a value or a goal, ask, ***"Is there something you could carry, wear, experience or see several times a day as a tactile, visual or visceral reminder of that?"*** The answer is almost always a creative totem of their best self (collages, calendars, post-it notes, a piece of jewelry, messages on voice mail, a smooth stone in the pocket, alerts). Some tangible metaphors are defining events like weddings or graduations or funerals (***"What will you leave behind as a legacy?"*** or ***"What needs to just be buried with you?"***).

Some tangible metaphors are personal memorials of those moments in life after which you know things will never be the same.

Evaluating. Life is full of evaluations. As a coaching skill this one is about the establishing and maintaining your coaching alliance, agreements and agenda—and about growing awareness. **Starting with your first interaction with a potential coachee, let them experience you as a coach.** Pay attention to your coachee's hopes, destinations, markers and outcomes. Find out about their meta-agenda and the hundreds of small agenda along the way as their awareness grows. Begin with the end in mind In most sessions, you'll ask something version of those Five Questions:

1. What would you like to work on?

2. How will you know we're making progress? (*If we hit the nail on the head in the next thirty minutes, what would you have? If this conversation helps, what will shift? What will be clear that seems fuzzy now? How will you know when you've got it?*)
3. What are the personal strengths and values you could bring to this opportunity/challenge?
4. Who else is in your thinking as we talk about this? (*The answers may surprise you.*)
5. How is this big enough to matter to you in the larger scheme of things (*to your vision and values*)?

And along the way, you might ask, ***“What are you taking away?”*** or ***“What do you have now that you didn't before?”*** As your alliance grows and your coachee's agenda deepens, you will likely bring up how your coaching agreement is evolving too: ***“When we met three months ago, you had made the decision to move to Seattle. You've made so much happen. Congratulations. How do you see your next steps?”*** The goal is to refresh your agenda, goals and outcomes or to begin to bring your coaching partnership to an honorable close. **Note:** It is the mark of an unethical coach to keep himself/herself in the game without a clear mission. Both evaluating and wrapping up (see below) include having the integrity to point out when coaching isn't happening and being willing to stop.

Part 4 / Your Authenticity, Transparency and Presence. Being brave.

The quality of the person you are, of your life itself, is your key instrument in this work. The Christian mystic Thomas Merton wrote, ***“He who attempts to act and do things for others or for the world without deepening his own self-understanding, freedom, integrity and capacity to love, will not have anything to give others.”*** Are you nurturing in yourself the conditions and behaviors that trust requires? Our job as coaches is to grow ever more awake to our own energy, wisdom and true moral obligations, to our own reactivity and critical voices, to our truest voice and our clearest cautions. To our own “deep-down.” In the words of David Brooks, as coaches, we pay attention to both ***“résumé values”*** and ***“eulogy values”***—in our lives and in the lives of the courageous people we coach.

As a coach, will you know when you get scared or reactive or uncomfortable? Will you ask questions to which you don't already have an answer? Will you risk sounding like a fourth grader? Will you know when you need to recover, to consult or to refer? And will you find ways to be less automatic and more voluntary in what you do next? And maybe most important, will you stay safe and kind-hearted, calm and resilient? Will you allow your coachee to surprise and influence you? Will you find ways to forgive? Will you build in time for some solitude and reflection--and for some patient self-coaching? This is about building your soul's agility with both grace and truth.

Bravery operates in the background of great coaches. It's the habit of routinely challenging your own comfort zone and of being willing to get out-loud about what other people in the room are probably thinking. Sometimes your job is to “take one for the team:” ***Susan, every comment from you about this project has sounded tired and snarky . . .*** This isn't you diagnosing, it's more of an extension of ***“saying what you see and hear.”***

Ask yourself, do you need to be right? Or liked? Or tranquil? Or admired? Or the voice of justice? Can you stay present when things get uncomfortable? Skilled leadership coaches learn to challenge their fears and defaults in the interest of the well-being of the people they're coaching. For example . . .

Direct communication: Sometimes we stand by our coachees by standing up to them. This, of course means that they already know that we're in their corner. My own mentor coach used to encourage me, ***“Patty. Go right in there.”*** When you do, you may not be pleasing, but you will probably be serving. You are straight-forward and uncluttered in the face of excuses and habits that inhibit the development of your coachee. Two examples: ***“You got pretty loud and snarky in the meeting today. What happened***

just before you got loud and snarky? What did you notice about the people in the room right afterward?” Or “You’ve mentioned to me in passing your concerns about your (weight/lack of exercise/substance abuse/unhappiness at home), what if I challenged you to take yourself more seriously about that?”

An intuitive hit. As a coach you know how listen to yourself and then to speak with transparency, immediacy and respect to your coachee? This can be a hard truth or simply a blurt and it may take extra courage, *“Wait. What?!”* or *“I have a hunch about this. Want to hear it?”* Maybe, because of your alliance, you are able to bring up something that everyone else sees but may not have the courage or skill to say directly to your coachee.

Leading as the coach and “being the container”. The person you’re coaching chooses the agenda i.e. the destination they are hoping for. Coaches take it seriously by holding the focus, the pace and challenging distractions (*“I’d like to turn off devices for the next half-hour. OK with you?”*).

Self-understanding / self-coaching. The areas in our own lives that we haven’t explored or made peace with are the ones we won’t tend to explore with other people. And in addition, good coaches have some true moral judgments that make them a poor fit for some types of agenda or businesses. The challenge here is to keep growing, challenging your own comfort zone as you work with coachees when their agenda is “close to home” for you. When this happens, slow down and stay gently curious. If you feel stuck, call me or another colleague. I’ll help you decide how to expand your comfort zone and, in some cases, how to refer someone to a different coach or resource.

Shut up. Shut up. Shut up. This one is a signature SeattleCoach skill probably because we’re all so enthusiastic and experienced in life and we just want to help! And though it’s hard for good people to stop helping, sometimes it’s the respectful thing to do. Don’t you love it when you have an opportunity to fill a silence? We need that. Our coachees have things they’re longing to say. If you can learn to let silence do some of the heavy lifting in coaching, the person you’re coaching will likely grow in their awareness and they’ll tell you what you want to know. Then they’ll thank you. Personally, when I discipline myself to breathe and wait while my coachee is processing, I think about the vivid Spanish verb, *esperar*. It carries two meanings for which we don’t have an equivalent in English: **To wait. To hope.** And then I get a little better at challenging that little voice in my head that insists that I know and they don’t. So often I’m wrong.

Speak up. Speak up. Speak up. On the other hand, maybe if you’re enthusiastic but more of an introvert, the challenge might be, again, in the words of one of my mentor coaches, *“Patty! Go right in there!”*

What else? Can you say more? Tell me more? Keep going? When you use one of these invitations, your coachee gets to refine the direction of the conversation—maybe even help you to understand things better before you ask a question. (This skill is especially useful with coachees who tend to be people of few words but who may feel things very deeply.)

Recovering your focus. When you know, as the coach, that you’ve lost focus, or your own triggers or gremlins have been busy and you need to recover: Notice it—not necessarily why. Just **notice** it. **Naming** it out loud: *“I just lost you. I think I went away for a moment.”* And **reconnect**—bring your attention back to your coachee. Your transparency might even deepen the alliance.

Coaching postures. Every coach has a “default” posture—the one you reach for first. What is yours? And what would it take to practice more fluency with the other three?

- “The Supporter.”

Leaning in: Attending, listening. Interesting factoid: Studies show that women coaching together may prefer this one as a starting point.

- **“The Challenger.”**

Sitting forward and tall: Disagreeing graciously. What does your posture look like when you do this with someone you care about? For me, it’s usually a tall relaxed posture, with soft eye contact.

- **“The Witness.”**

Sitting back: Waiting. Taking it in. See “witnessing.” (below).

- **“The Companion.”**

Looking together: You know those rich conversations you’ve had in cars and on walks where you and the other person look outward together, side-by-side, as you connect well? That. Interesting factoid: Studies show that men coaching together may prefer this one as a starting point.

Staying aware of what you want to teach people. What will you do when a coachee says, *“Can you just tell me what you’d do?”* It’s flattering to be asked to console, fix, rescue, prop up or to tell about the time when you . . . And you’re not without your own opinions. Shoot. Some of your opinions are even grounded in true expertise! Why not just tell them? The quick answer is that if you can **“coach the person, not the problem”** (or in the words of one SeattleCoach, **“coach the person through the problem,”**) then your coachee gets to grow—and he or she gets the credit. Remember your coachee is creative, resourceful and responsible for their own outcomes. So, proceed with caution when you shift from coaching to advising:

1. Is this time-sensitive and is your clear direction needed? Learn to do thirty minutes of pure coaching before you start advising or consulting. It’s a gamble, but people will surprise you with the wisdom and resources they didn’t know they had—or are ready to explore.
2. In your self-coaching/self-management pay attention to what you long to teach people so that you can be very chosen and deliberate about using that stuff. A coachee is far more inspired by the coach who asks a great, constructive question than by a coach who’s thinking, **“I know and you don’t.”**
3. And when you do offer expertise, invite your coachee’s evaluation of it.

[Click here](#) to listen to a **“Dear Master Coach”** post about the question of giving advice as a coach. Bottom line, if your overall agreement is to coach, then coach first and see what happens.

Witnessing. In her lovely novel, [Gilead](#), Marilynne Robinson talks about the “incandescence” of a moment “when the charm of a thing strikes you.” Sometimes we are the first to see or hear something very special in the life of a person we’re coaching. It might be a story, a plan, a success or a heartbreak. Or a moment when we catch them being brilliant. When those moments come, without intruding or making the moment about us, we witness. We recognize we’re on sacred ground. And the person we’re coaching gets to see the influence of their life on our own.

Statements of Impact. The people we coach influence us, inspire us and teach us things. They might even irritate us with a habit or a word. A statement of impact happens with the coach speaks directly about his or her personal and immediate response to being with the coachee. As always, ask permission: **“Can I tell you how this lands on me?” “Your energy about this inspires me.” “Your words are a little jolting to me.” “I just got tears in my eyes too.”** A statement of impact doesn’t mean that you continue on into a judgment, an interpretation or a lecture. It’s just you, as the coach, saying what maybe a lot of other people in your coachee’s life don’t or won’t say.

A Statement of Impact usually means I've caught my coachee in the act of being brilliant or transparent or visionary about their life. And when I mark the moment, they will remember it: They have just "emotionally rehearsed" something important with me: Something that will play soon in live action.

Part 5 / Skills to Use Strategically and Powerfully

You won't use these skills in every session, but when you do, they will be powerful. Think of them as the red pepper flakes in your co-creation.

The Miracle Question. This skill is a gift to us from the practice of Solution Focused Therapy, a systems therapy that emerged in the 1980s. Steve de Shazer and Insoo Kim Berg were ahead of their time in inviting their therapy clients to focus not on the past, but on what they wanted to achieve today.

Coaches who learn to ask the Miracle Question well are able to invite coachees to engage their imagination, ambition, hope and courage. Ask permission and proceed gently: *"Imagine that, after you leave here, move through the rest of your day and then head to bed, that while you're sleeping tonight, a miracle occurs that accelerates the best outcomes we've talked about. When you wake up tomorrow, what would you begin to notice that would tell you that things were different? What would the specific evidence be as you begin to walk through your day?"* Then slow down and explore.

[Click here](#) to listen to a brief video by a gifted therapist. And [here](#) to read an excerpt from Steve De Shazer's book, [More than Miracles: The State of the Art of Solution-Focused Brief Therapy](#). 2007.

Championing. When your coachee is ready to take on something big—but doubts himself at the last minute, try asking questions to which you know he or she must answer *"yes:" "Do you have support? Did you think this through? Have you worked your butt off? Do you know how to be a great teammate? Do you have the skills? Do you want this? Are you a good person?"* After a few nods, be quiet and see what happens. (This is not the same thing as excessive cheerleading.)

Helping your coachee to regroup. As trust and movement grow, it's normal for our coachees to have sessions in which they feel especially open or emotional. This is the skill of using your own authenticity to help them to regroup, to "know where the ground is" before they leave the conversation with you. They stay aware of what they've felt and accomplished in their work with you but are ready to rejoin the normal pace of life as they begin to metabolize it. Ask them what they will do to be gracious with themselves in the hours ahead. Keep an eye on the clock and make sure you leave enough time to do this. Maybe invite a follow-up email or phone call.

"What I know about you." There are times when you look your coachee in the eye and speak directly about what you see in their character, aspirations, courage and potential. This is another way of standing up for the person you're coaching as they consider a crucial next step. (This is not the same thing as excessive cheerleading.)

Wrapping up. (See "Evaluating" above.) When I conclude a coaching agreement, I gently build in time to acknowledge and celebrate what my coachee has accomplished. And, if possible, I assure them of my future availability to work with them on the new challenges and opportunities that turn up in their life.

Each of these skills and behaviors will help you to master the [Core Competencies of the ICF](#), which we'll begin to explore at length later in this Module and in Module II.

The Arc of a Solid Coaching Conversation

At each phase, when your agreement is to coach, “Show up like a coach”—remembering that your calm and authoritative presence is your key tool. Use your ability to build the conditions and behaviors that are required for growing trust to help you to find the right pace and to attend to the partnership’s deepening:

- Alliance (“signal strength”)
- Agreement (initially and along the way)
- Agenda (your coachee’s focus, hope, destination, outcome or personal development/desired competency)

The Beginning: Setting the Stage for Deepening Trust and Exploration

In the first minutes your job is to establish a partnership of trust and to explore and find the starting focus of the conversation. With the beginning or a strong alliance, you begin to hear about the agenda that is alive in the thinking of your coachee. Maybe the coachee has granted your wish and sent you a focus form or pre-work note. But even if they haven’t, you gently explore your own version of four inquiries in the first several minutes. You are both targeted and unhurried:

1. What would you like to work on?
2. How will you know we’re making progress? *(If we hit the nail on the head in the next thirty minutes, what would you have? If this conversation helps, what will shift? What will be clear that seems fuzzy now? How will you know when you’ve got it?)*
3. What are the personal strengths and values you could bring to this opportunity/challenge?
4. Who else is in your thinking as we talk about this? *(The answers may surprise you.)*
5. How is this big enough to matter to you in the larger scheme of things *(to your vision and values)?*

(And in time, the people you coach will begin to anticipate your five questions.)

If you and your coachee are hikers, you are helping them to choose an agreed-upon trailhead or destination. Will you pick up where you left off, exploring what the coachee has experimented with or thought more about? What did they try? What did they learn? Is there something to build on today? You consider the stage of change of change they may be in.

Maybe something big or new or distracting has just happened—or is coming up. Do you need to do some re-contracting? Is there a need for a “clear the deck?” or to refresh the agenda?

As you get underway, ask questions to which you don’t know the answers. Again, think of this part of the conversation as the trailhead. A good starting place. Things might change as the partnership moves along, but both coach and coachee learn to begin with a potential destination in mind.

The Middle: Exploration, “Double-Clicking” and Finding What’s Possible

Always aim for mutual equality and transparency. You are fully connected to who the coachee is, how they learn and what they have to teach you. You are focused and at ease, ready to be surprised, delighted, influenced.

- ☐ The purpose of exploration is to help your coachee to forward and deepen their awareness.

- ☐ Ask more questions to which you don't have the answer. Be OK with not-knowing.
- ☐ Make your questions simple, direct, unembellished. Wait for them to land. If you know it's a good one, maybe ask it a second time.
- ☐ Return to check if the coaching conversation is continuing to serve the purpose and measures of success. Adjust if necessary: *What are you taking away? What do you want right now?*
- ☐ Say what you see. Comment directly on your coachee's limiting beliefs and behaviors. Invite your coachee to use his or her own intuition as a tool to come back to himself in deeper and deeper ways. *What do you want? What prevents you? Is there something that will shift?*
- ☐ Let the coachee lead. Keep extending that invitation to him/her.
- ☐ Use skillful, patient questions when necessary to come back to the agenda and agreement.
- ☐ When you do an acknowledgment, make it specific and let it land. Let your coachee get your "wow."
- ☐ Let your coachee work a little harder, go a little farther.
- ☐ Ask direct, evocative and open questions that reflect the coachee's style and thinking and strengths.
- ☐ Use generative silence to do some of the heavy lifting. Are you OK with not knowing? Help your coachee find deeper contact with the known and the unknown. Glance together at the past if that story serves the current conversation.
- ☐ Bookmark your coachee's "I could's" along the way. They will likely lead to useful accountabilities.

Along the way, ask your coachee, *"What are you taking away from this conversation? Are we on the right track?"* If you are, some of your coachee's experiments and next steps are beginning to show themselves. Look for what is possible and desirable in the "what" and the "how" they are exploring with you.

The Close: Agreeing on Experiments and Next Steps

People love it when they leave a coaching conversation with a clear, desired and achievable next step towards a goal they feel deeply about. I tend to expect the people I coach to lead here too via their own intuition and methods of following up on what they aspire to.

- ☐ Explore the bookmarks and the "I could's" that have come up in the conversation.
- ☐ Explore potential experiments and next steps that fit the coachee's goals, style, pace and stage of change as well as his or her preferred methods of being accountable.

Keep in mind your own version of some core "accountability/aspirational" questions: "What will you do? When could you do it? Who will know? Do you need a plan?" (They work better than "homework.") And remember, great actions don't have to be big and public. A coachee may decide to journal or pray or reflect between now and the next meeting.

Read more about it . . .

This article, "The Neurochemistry of Positive Conversations" relates to every stage of a great coaching conversation.

Coaching Lab I: A Strong Start

"The beginning is the most important part of the work." Plato, The Republic

The goal of this exercise is **not** to do a full session in four minutes. Rather, the challenge for you, in the midst of your coachee's busy day, is to use the **Core Four** to explore and deepen **Alliance, Agreement** and **Agenda**.

In Coaching Lab I, we want you and your coachee to gently revisit those four questions that will help you to (1) find the focus, (2) the markers of success, (3) why it matters to your coachee and (3) who else might be in their thinking as they enter this conversation. We know that you won't always be able to explore these questions in such a limited amount of time, so think of this as a challenge.

You know that visceral sense you get when you've set the stage well? When the table is set? You've established the conditions for a safe and welcoming conversation and you've got a solid sense of the right direction, of what needs to happen next, of signal strength. You understand both what your coachee is hoping for and what success looks like, the right ingredients are at hand and you've got the confidence to improvise if need be. That's the gut sense I want you to have when you've co-created the start of an effective coaching conversation of any length, even brief ones.

For this exercise, you have up to four minutes to accomplish a strong start—but it may not take that long, so feel free to stop when you know you've established a solid foundation for the conversation. Fully explore the focus and purpose of the conversation, knowing that it will evolve and deepen throughout a fuller session. Some of the dots to connect as you prepare for the session and as you move into a strong start:

- ☐ As you prepare review their focus form or notes to you. Remember, when we ask for a focus form or pre-session email, we're really asking for our coachees to have a conversation with themselves before they have one with us. If your wish has been granted, what looks top of mind in what they send prior to your session?
- ☐ As you begin, remember reset? That. You're the host and I think of this as pleasantries with purpose. You listen at Level III and follow the energy. (Did something big or new or distracting just happen? Is there a need for a "clear the deck?")
- ☐ If necessary, you clarify any agreements (for example, *"We've got thirty minutes today, right?"*).
- ☐ And then explore (in your own way) those five questions:
 1. *What would you like to work on?* What is the change or growth (or even "Big Change") that your coachee is pursuing? What were your coachee's accountabilities or experiments from the prior session? What did they try? What did they learn? Is there something to build on today? Is there something else?
 2. *How will you know we're making progress?* What might be the markers of success in this session? *"If we hit the nail on the head in the next thirty minutes, what would you have? If this conversation helps, what will shift? What will get clear that seems fuzzy now? How will you know when you've got it?"* The person you're coaching decides what's important to his or her learning and direction. With a strong start, the agenda will likely undergo some refinements through the course of a full session.
 3. *What are the strengths and values you could bring to this opportunity/challenge? How those things will help them?*
 4. *Who else is in your thinking as we talk about this?*
 5. *How is this big enough to matter to you in the larger scheme of things (to your vision and values?)*

Your colleagues will observe and make a few notes. And as we begin, we'll practice what to do if you get stuck or if you just want some extra creativity and need to phone a friend. (It involves the touchdown move.)

We'll let you know when you hit the four-minute mark. Then we'll debrief, first with the coachee then with you, the coach, then with the team. The faculty members will give you feedback and invite you to note at least one thing to keep doing or to work on going forward.

As always, breathe. Be kind to yourself as you step into and practice your coaching presence. [Here's a recording](#) of me doing this for "Real Coaching Sessions Unplugged," a national podcast for coaches. Listen to the way my coachee and I begin—through about the first 7'30."

Coaching Lab II: A Complete Ten-Minutes of Coaching

In Coaching Lab I we asked you to focus for up to four minutes on the beginning of a coaching conversation (of any length), establishing the agenda, the markers of success, why it matters to your coachee and asking about who else is in their thinking as they prepare to explore with you.

Sometimes our coachees need to touch base between sessions. And whether you're an internal coach and someone has poked their head into your office, or you're an entrepreneur who has built some between-sessions availability into your agreement, sometimes a strategic ten minutes can make a lot of difference. Here's the challenge: Can you still make a brief conversation a full coaching conversation? As always, think: ***alliance, agreement, agenda; the rhythm of explore-experiment; the Core Four.***

This is what we'll practice in "Coaching Lab II." Not easy, I know, but think of this as a big learning experience—You're safe and you can't fail. And you'll get useful feedback from good people who are firmly in your corner.

As always, the purpose of this exercise is to cultivate your ability to help the person you're coaching to join you in finding the areas where exploration and experimentation are most possible and desirable. As a coach:

- Ask questions that reflect your understanding of where your coachee is in the stages of change,
- Listen for the information in resistance,
- And manage the space and the pace of the session, collaborating with the person you're coaching on areas where they are ready to use their strengths and to invite aspiration and action.

You will coach a peer-coaching partner you've worked with in the week(s) prior to your turn. This will probably be a different person than you did your four minutes with before the mid-term. You may want to ask for a Focus Form.

Members of your Cohort will use "Score Your Key Skills" (below) as they listen. If you'd like to record your session and debriefing (for your own learning), bring your favorite device. When you record someone, be sure to get their permission. As always, it's fine to have notes with you.

1. When it's your turn:

- ☐ We'll ask you, the coach in the spotlight, what feels easy, almost second nature to you in your coaching skills,
- ☐ We'll ask you what feels like a stretch,
- ☐ We'll ask you if there's anything you are focused on or experimenting with in your skills, and
- ☐ We'll ask you if you'd like a two-minute warning.

2. At the end: We'll debrief,

- ☐ First with the coachee
- ☐ Then with you, the coach (What did you notice?)
- ☐ Then with the Cohort
- ☐ And then a faculty member will give you their feedback.

- 3. Along the way:** *If you get stuck or just want some creativity, do the touchdown move and invite one of us to engage with you in thinking of possible next steps.*

You may find it useful to [go back to this recording](#) from the “Real Coaching Sessions Unplugged” podcast and listen to the way my coachee and I navigate a brief session through about the first 28 minutes. Optionally, an interview with the host follows our “session” from 27:41-52:15.

Breathe. And be kind to yourself as you practice your coaching skills and presence.

Score Your Key Skills

(There's a digital copy on the [Coaches' Hub Module I page](#).)

In Coaching Lab II, members of the Cohort will use this handout to give you feedback.

The Coachee's Stage of Change:

- ☐ *What's your theory? Did the coach's questions fit—and challenge?*

The A's

- ☐ **The Coaching Alliance:** *Is there a full partnership in which the coachee is safe enough to fully engage with the coach? Is the coachee the ultimate decision-maker? Is the coach connected and open?*
- ☐ **A Clear Agreement:** *Is there clarity about the what, how, scope?*
- ☐ **The Coachee's Agenda:** *As an observer could you tell what it was?*

The "Core Four"

- ☐ **Respect** Coaches express and embody respect for their coachee's goals, agenda, permissions, confidences and resourcefulness.
- ☐ **Energy** Coaches study and use their personal energy, judgment, experience and intuition. They are aware of their own triggers and agenda and they use their own voice, mood, breath and posture in the work of being present.
- ☐ **Acknowledgment** Coaches say what they see in their coachee's character, actions, strengths, self-responsibility and vision. The best acknowledgment starts with "you" rather than "I."
- ☐ **Listening** Coaches listen with focus and curiosity—to the verbal and to the non-verbal (voice, mood, breath and posture) as they follow their coachee's energy, ideas and epiphanies.

The "Explore/Find the Experiments Dynamic:" Did the partnership find a possible and desirable next step? Was there some agreement about *"What will you do? When will you do it? Who will know? Do you need a plan?"*

Key Skills

	<u>Used</u>	<u>Could use</u>
Saying what you see and hear	_____	_____
"Reset" / Finding the focus	_____	_____
Clearing the deck	_____	_____
Finding the right pace	_____	_____
Clarifying focus	_____	_____
Meta-view	_____	_____
Metaphor	_____	_____
Time-out	_____	_____
Bottomline	_____	_____
Reframing	_____	_____
Level III questioning	_____	_____
An inquiry	_____	_____
Exploring resistance	_____	_____

<i>Old stories?</i>	_____	_____
<i>Missing resources?</i>	_____	_____
<i>Stage of change?</i>	_____	_____
<i>Competing commitments?</i>	_____	_____
<i>Critical voices?</i>	_____	_____
Leveraging the coachee's values, strengths, energy	_____	_____
Using the coachee's bright spots and defining stories	_____	_____
Requesting / challenging	_____	_____
Brainstorming / edge-storming (the ten percent shift)	_____	_____
A tangible metaphor	_____	_____
Evaluating	_____	_____
Being brave	_____	_____
An intuitive hit	_____	_____
Leading as the coach	_____	_____
Self-understanding / self-coaching	_____	_____
Shut up. Shut up. Shut up.	_____	_____
Speak up. Speak up. Speak up.	_____	_____
What else? Can you say more? Tell me more? Keep going?	_____	_____
Recovering your focus	_____	_____
Coaching postures	_____	_____
Staying aware of what you want to teach people	_____	_____
Witnessing	_____	_____
Statements of Impact	_____	_____
The Miracle Question	_____	_____
Championing	_____	_____
Helping your coachee to reground	_____	_____
"What I know about you"	_____	_____
Wrapping up	_____	_____

Your observations?

Introduction to Coaching Ethics

“When you break the big laws, you do not get liberty; you do not even get anarchy. You get the small laws.”

G.K. Chesterton, English writer, poet, philosopher, dramatist, journalist and theologian

As in all of life, it matters in coaching that people have a high opinion of your essential integrity, kindness, trustworthiness and good faith. It matters that they like you. As members of the International Coach Federation, we agree to high ethical standards. But no one else will regulate you (at least not yet). As a member of our SeattleCoach Network, I’m going to challenge you to set the bar high in the following six areas. Staying on course ethically is mostly about your common sense, your courtesy and your values.

This isn’t legal advice, but if you make a practice of being better than you need to be and if you make a practice of staying current in your growth and ICF Certification, you may not ever need to hire an attorney to get you out of trouble with a coachee.

1. Confidentiality: That is, taking care of other people’s information—this includes how you keep your notes, mail and files, both digital and paper.
2. Documentation. Be clear about your agreements (what goes into your notes, how you’ll talk about money, boundaries and coachee dissatisfaction).
3. Agreements. Whether you’re working with individuals or teams, employees, mentees or traditional coachees, take the time to get clear about hopes and outcomes. How will you and the person you’re coaching begin to know you’re succeeding?
4. Consultation: As a developing coach it’s professional to stay in conversation with colleagues as you work. In addition to sharpening your craft, your colleagues will help you to stay aware of your growing edges.
5. Maintain and grow your professional competence. And stay within your realm of competence.
6. Awareness of risk: how close is what you’re doing to psychotherapy? How vulnerable is your coachee? Reserve the right to require therapy as a condition for further coaching. As with all risk assessment, follow your intuition and good judgment, ask “what could go wrong?” Document well and seek consultation.

The Biggest Rookie Mistakes/Complaints

- Having unclear agreements
- Misrepresenting your services or credentialing; overpromising/under-delivering
- Lack of confidentiality; not taking respectful care of your notes and files
- Being socially or sexually inappropriate with a coachee
- Forgetting to be genuine, kind and courteous
- Even if you don’t think of yourself as having bias, there are probably things that will come up that make you stop listening and start reacting and defending and moving to your own agenda. That’s normal, but part of your job is to be aware of when it happens and what you’ll do about it. Level III listening is the opposite of “reloading.”
- Not listening to your gut and awareness of risk (*“What could possibly go wrong?”*)
- Not growing, consulting and building a trusted network of colleagues
- Not referring a coachee when they would be better served by another professional

When to Consult (i.e. call one of us)

- When you're stuck.
- When things are getting too emotional.
- When you lack situational info/expertise (i.e. you keep thinking you need more info about the coachee's context and story).
- When you wonder if you might be facing a mental health issue.
- When your personal boundaries are beginning to feel fuzzy.

We'll talk more about the ICF Code of Ethics (and how to stay out of trouble) in Module II.

Big Change, One Stroke at a Time

Part of our job is to steadily hold the focus on what the people we're coaching are trying to accomplish, both in the metaview and "today." Please read the following as you prepare for Coaching Lab 1

"To journey without being changed is to be a nomad. To change without journeying is to be a chameleon. To journey and be transformed by the journey is to be a pilgrim." Mark Nepo

Having walked through a few wildernesses and addressed some big and lasting change in my own life, I know that sometimes you volunteer for it—you may even have a vision for it. I also know that sometimes big change tosses you around, like a kid in the breakers. There are a couple of classic storylines I think of. The first is simply, A hero goes on a quest. The second is quite different: The crisis or the villain arrives before the hero knows there's a new reality. The hero has to wake up and then grow into her calling.

If you're going to go to all the trouble to create, march into or tumble through big change, you want the process to be as life-giving and sustainable as possible.

However change comes, I work with people and organizations to help them think through what happens next: What to expect and to pay attention to, how to hold steady in the process, how to think about obstacles (and those little hecklers and resisters in your head) and how to talk about it along the way.

If you're my coachee, these are some of the first questions I'll begin to get curious about in our conversations together. I'll wonder about stuff like:

- *"What kind of a person do you want to be? What kind of a vision or sense of calling is beginning to emerge for you—and maybe anchor you?"*
- *"What is it about that sense of purpose that gives you moments of excitement or even joy?"*
- *"How will your personal strengths help with your vision? What are they?"*
- *"In our first few weeks and months of work together, what do you think you are ready to work on, leave behind, do more of, do less of or get better at? Why do these things matter to you?"*
- *"Who else is in your thinking as we talk about these things?"*

You may have responses from more than one area of your life, and your spouse, important relationships or team members probably have their opinions. The playwright Lillian Hellman said, *"Nothing, of course, begins at the time when you think it did."* The beginning of change can be sudden, or it can take years. Sometimes when I ask, *"What do you want to work on?"* I hear a hunch, an idea just forming. Sometimes I hear a clearly defined commitment. A writer I coach is several months into the development of a novel. She's researched 1840s Scotland, developed some fascinating characters and written some vivid scenes. And she's told me that she's getting increasingly committed to the reality of this book. In her words, *"I'm not married to it yet, but I'm not seeing anyone else."* She's steadily, creatively on the move. And she feels deeply about it.

Here are some other answers that have come in response to my *"what-do-you-want-to-work-on?"* question:

- *"I want to be more inspiring and out-going."*
- *"I need a new job—maybe find my life's work."*
- *"My leader just doesn't stop to listen to me—I feel disrespected (and not for the first time). I need to figure out my part in that."*
- *"I want to lead my team better—and to see them collaborate better too."*
- *"I want to lose ten pounds."*
- *"I think I could become the next CEO."*
- *"It's time for me to write something."*

- *“I’m ready to find a life partner.”*
- *“We’re having a baby.”*
- *“The last baby is leaving home.”*
- *“I need to make money without losing my soul.”*

Coaching is famous for helping people to grow more curious and awake to their sense of purpose, discovering, testing and creating action by finding the next step. The process isn’t very linear. Sometimes what seems like a great idea is just not right for you. If it’s “not right” then why? The answer might be where it gets brilliant. Something else—better, deeper and unexpected—might come to you. The process is about paying attention, exploring, testing and learning in ways that are both focused and well-paced.

As my coachee, you’ll hear me talk often about the “goldilocks zone”—not too hot/cold, hard/soft, big/little. But just right. We’ll challenge the status quo with solid, right-time, calculated risks and I’ll ask you to think about who’s in your corner. The calculated risks grow with you, and with each win, the pros for the change begin to outweigh the status quo. This doesn’t mean there aren’t big scary, sometimes uninvited and uncomfortable moments.

You’ll hear me talk about “the wilderness.” It’s that span of time that usually begins before a clear ending and lasts well into the new beginning. The wilderness takes time too. It goes something like this (the biblical story of Moses comes to mind): You get a lot of questions from the people who depend on you: *Where are we going? Are you sure you know the way? What was so bad about the old situation anyway?* These people will appreciate extra patience and engagement. You may think there are more important things to talk about, but they don’t. In the wilderness, I may challenge you to make extra time to keep your followers (and those who love you) especially well-informed and close.

As confusing, ambiguous, scary and fluid as the wilderness is, it’s tempting to hurry through it. But it’s where many of the biggest breakthroughs and creative opportunities come into focus. Like any hero on a quest (even a reluctant one), you will meet with resistance that must be understood, overcome, accepted or danced with as the transformation becomes irresistible. You become more awake than you were before.

Like Moses in his wilderness, you will learn things about being resilient, patient, open, willing to repeatedly test and learn and, through it all, to listen to your life and to the core people in it.

You can tell you’re “at the beginning of the end” of the wilderness when your new direction begins to look like the new normal. You are determined, open, seeking, continuing to make small choices in the right direction. Relapses, second thoughts, discouragement and “squishiness” begin to diminish.

In this phase too, as your coach, I will continue to listen deeply, challenging and supporting and asking and occasional hard question. And I will acknowledge the character and strengths I see in you.

This level of courageous growth and sustainable change affects your life in every way—spiritually, emotionally, physically, socially and in the way you savor your days and relationships. The amazing people I work with tend to keep it going, both as they work with me over time, and as they find and grow their own coaching voice—the one that will stay with them as they continue on without me.

A coaching relationship can be a life-changing pilgrimage in the middle of a cherished life, and it is my privilege to travel with brave people like you through some of the most significant and magnificent parts.

Read more about it . . .

[Helping People Change](#). Richard Boyatzis. 2020

Coaching Big Emotions

“When you listen with empathy to another person, you give that person psychological air.” Stephen R. Covey

“When feelings are mentionable and manageable, it is a great service to mental health.” Fred Rogers

In our society we’ve gotten all hung up on the management of conflict, hurt feelings and the steadily available vortex of doom in the media and online. We spend a lot of energy reacting, avoiding, containing, blaming, getting partisan, scaring each other, feeling heated and helpless or ashamed and then usually exiting, getting quiet (or getting numb) instead of finding ways to do less catastrophizing and to be more connected and fruitful.

There are far more sophisticated biochemical explanations for the physical sensations and social consequences of all of this (I’ve listed a few of my favorite books below). But I think of emotion as having **two layers**. Both are useful in their own ways to our surviving and thriving; both are filled with somatic and social cues.

The **first layer** is instantly reactive and defensive. It’s our early-warning physical and biochemical reaction to real and perceived danger. Our ancestors were inspired by the first layer to be ready to instantly assess, “*Can I eat that?*” and “*Can that eat me?*” On the savannah, we didn’t have the thickest skin or the biggest teeth or scariest claws, but we did, like all mammals, develop instantaneous reactivity. Afterall, “life has to win every day” while “death has to win just once.” It makes sense that we see threats everywhere. We’ve been fighting, fleeing and freezing for millennia. Perpetual crisis can be automatic! It’s easy! And for some reason, we’re just as easily spooked and negative now as we ever were—even in these amazing days of health, freedom, prosperity and safety. We’ve got a “negativity bias” which can of course still protect us from lions, but it can also distort—and often become our easy and unexamined default. But when we slow down on the reactivity and discover that it’s not really a lion, we breathe differently and move from reactivity to choice. What if it’s really a pony?

And there’s a **second layer of emotion. It’s slower but just as adaptive**. Once we are secure enough to slow down and get to it, this layer helps us to connect and communicate, to be softer with each other and to create order. In the long run, the **second layer** became our species’ greatest advantage. The **second layer** includes what I call “**belonging-longing**.” And when we find consistent ways to inhabit the **second layer**, we get to connect and be courageous with challenges all at the same time. The **second layer** is where we can stand alone when we need to. The **second layer** is also where we can belong. The **second layer** is where we built civilizations that are not based simply on shared fears and hatreds. The **second layer** is where we are most alive.

Central to our work as coaches is growing clarity about our own two personal layers. What scares and annoys you? The most important thing is always what you will do next. The most obvious place for both layers to appear is with people we care about and work with.

Picture this . . .

I’m sitting down with a leader and her team of very clever, very busy people. We’ve met together before and share some trust. But today it’s pretty quiet. I follow the energy and listen with my eyes to a roomful of **first layers**. Two people are staring at the floor and dodging eye contact. One guy wants to know if we’re going to get all “woo-woo” today. One woman is leaning back, arms folded, looking surly. Another is asking how long we’ll be meeting (she has important work to do). And another is getting all chirpy and asking who needs a seltzer. The leader is leaning in, looking in my direction. She knows that her team’s subject matter expertise is not the issue. Something else is getting in the way of their effectiveness. Everyone senses danger and their physical presence reflects it.

I check my own reaction. Each of them looks overwhelmed in their own way. Am I? I already know that my personal **first-layer** response to the danger is to try to charm people. That won't help much. **Nor will it help if I:**

- *Start delivering tools and tips, telling and fixing or if I*
- *Ask each of them for their analysis of the issues (and who they think is to blame). This is a paradox because their big brains are responsible for much of their success. Except that, as a team, they're stuck and their leading-edge ability to analyze doesn't seem to be helping*
- *It won't help if I tell the surly one to leave and come back when she can be nice at which time, I'll teach her some communication skills or if I*
- *Invite them to vent those powerful **first layers***

These people look sullen, reactive, angry, overwhelmed, helpless, hopeless and scared. Venting that stuff will only make it worse. It reminds me of how instantly angry I can get in traffic when another driver does something unpredictable. I may look furious in the moment, but the truth is, I'm scared. Then as soon as I see an out-of-state license plate and a grateful wave from a disoriented visitor, my amygdala calms down, I thank the **first-layer** reactivity for doing its job of preparing me to fight, fly or freeze. And, knowing I'm safe now, I'm back to my **second layer**, ready to return my attention to building civilization again.

Big emotion can sweep us all up.

I know (because they're mammals) that each member of this team wants to connect and belong, to be generous and receptive. If I can help them to explore and get some access to their **second layers**, I know already that I'll hear things like:

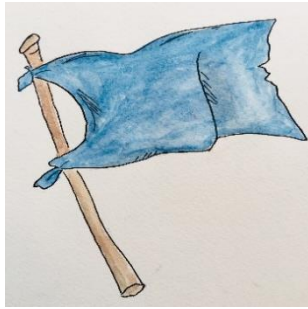
- *"I'm scared I won't do this right"*
- *"I'm not really indifferent, I'm just frozen"*
- *"I'm worried that I'll say the wrong thing"*
- *"I want you to trust that I'm trying"*
- *"This is foreign territory and I don't know what to expect"*
- *"Maybe I'll fall apart or sound crazy or get hurt forever"*

Each one—including the coach—comes with a story about (and good reasons for) their **first layer**.

Before I talk about what happened next . . .

Put yourself in my seat. What would your story be as the coach in the room? What are the sensations you notice? What are you automatically saying to yourself? How are you coaching yourself? How will you be able to return your attention to these good people and to what they are offering you? For as long as you're a coach or coaching leader, you'll be getting better at paying attention in two directions: to your coachees of course, but also, to yourself. In your own reflective practices, self-awareness and emotional regulation, you will become fluent in moving between the automatic **first layer** to the chosen **second layer**.

Take a moment and reflect on the following question (which I've asked myself repeatedly through the years):



“If a flag flew over the house you grew up in that announced to the world how your family dealt with big emotions (for example: rejection, sadness, conflict, grief, appreciation, attraction), what would have been written on it?”

I’ve also asked hundreds of people this question and I’ve heard all kinds of answers:

- *“Be the boss. The person who stands up first wins.”*
- *“Get invisible. Keep it to yourself.”*
- *“Leave.”*
- *“Be silent and comply.”*
- *“Defend yourself.”*
- *“Yell. Get scary.”*
- *“Be silent. Get scary.”*
- *“Be perfect and blameless.”*
- *“Breathe. Smile and ask a question.”*
- *“Do something funny.”*
- *“Charm them.”*
- *“Call Grandma.”*
- *“Be extra nice and maybe hold hands.”*
- *“Get busy fixing.”*
- *“Don’t poke the bear.”*
- *“Be the peacemaker. Find common ground.”*
- *“Pout. Show everyone how hurt you are.”*
- *“Argue. Cite your source.”*

Those people who raised us usually got lots of things right. But when it comes to anger and resentment and shame and sadness and pain and loneliness and disagreeing and ambition and attraction and love, it’s pretty common for families to have their own incomplete intergenerational patterns and stuck places. Now, as a grown-up it’s pretty normal to find yourself responding in the same familiar (maybe **first layer**) way you always have. Habit has its own gravitational pull.

For example . . .

What would your response be if a coachee said in your sixth session, *“I’m not getting much out of our conversations. Can I get a refund?”* **Here’s a hint:** Remember you are listening in two directions. Something historic in you probably gets bumped. Can you take a couple of breaths to coach yourself through “the automatic to the chosen”? And then can you return your attention to your coachee’s experience?

When this happened to me a few years ago, I had to breathe through an instant **first-layer** cloud of hurt and shame and what-can-I-do-to-make-it-right?! And then I asked my coachee, *“How does it usually go for you when you’re not getting what you want?”* Together, we challenged an old pattern and my coachee learned to speak up more for what he wanted, rather than just leave. He didn’t have to “be silent and comply and leave” this time.

Your growing capacity for staying gently curious and collaborative with both layers of big emotion is right at the heart of your coaching presence. It makes you hugely interesting to human brains. Here's why. Psychologically and neurologically, when you get good at your own version of Level III, your calm and unhurried presence gives the human brains with whom you engage a chance to join you in finding a new path through an old and familiar experience. And to maybe plant a new flag.

Back to my quiet, unhappy team . . .

I ask them to think about my flag question for a minute or two. Then I invite each person to tell a story and gradually we began to smile and laugh and become thoughtful together. I even catch glimpses of vulnerability. And bravery. We start to have a different experience. I stand beside them as they explore and name and get curious about each other's stories. They experience emotion as workable and even useful. They actually help each other out of that **first-layer vortex**.

Here's what I do that helps as I invite them to tell their stories . . .

- I **slow down** (**first-layer** reactivity is fast and automatic and I want quiet amygdalas so that we could get to the unhurried **second layer—and to more trust**).
- I speak with **soft curiosity**. You can hold attention with your voice: *"Stay with me."*
- I keep things **simple and uncluttered**.
- I use their **words and stories**.
- I say what I see and hear (*"you just leaned in—seems like you don't want us to miss this"*).
- I help them to create order—to see that emotion isn't irrational. Both layers are full of information.
- I remind myself that their stuckness isn't due to their lack of expertise—it's due to their process.

And then this happens . . .

Me (taking a breath and smiling): *"OK. Who's got a story?"*

Surly woman (emphatically): *"I'll start. Our flag would have read, 'Make yourself useful.' When things got tense at the dinner table, I got good at finding something to fix."*

Me: *"You're still good at finding things to fix!"*

SW (smiling now): *"Yes! And the bonus was that I could usually leave the drama at the table to go do it!"*

Me: *"So help me to see the picture: You're a normal kid. You just want to survive and belong. What early warning signals did you get physically that told you that things were getting dramatic?"*

SW (getting quieter, beginning to use her second layer): *"Hmm. I guess I'd start to hold my breath."*

Me (slowing down): *"What would that mean?"*

SW: *"I don't know. That I'd better figure out how to be useful and go do it!"*

Me: *"So you held your breath, you got mad/scared/sad, you said to yourself 'I'm going to go find something useful to do.' And you'd get to leave. Is that how it went?"*

SW (slowing down): *"Well yes."*

Me: *"This makes complete sense to me: As a kid you'd notice you were holding your breath as things got dramatic. That was your early-warning signal to leave the table and 'be useful.'"*

SW: *"And it was a bonus that I could get away from everyone's drama and go be useful **alone!**"*

A team member chimes in: *"You're still good that too."*

(Everyone laughs.)

Me: *"Could you help me understand something else?"*

SW: *"OK."*

Me: *"As a kid, who had your back and helped you to breathe when things got dramatic?"*

SW: *(Shrugs)*

Team leader: *“Could I say something?”*
SW: *(Rolls her eyes and smiles) “OK.”*
Team leader: *“Well. I could have your back here.”*
SW: *(Thoughtfully) “I’m not sure I know what that would look like.”*
Me: *“Thanks for going first.”*

(Sulry woman becomes visibly less sulry and leans in to hear the next story. Trust was getting fast-tracked.)

The team listens as each one tells a story and allows me and their team members to respond. I stand beside them as they have an experience, de-escalate, make it safe enough and find some order. They slow down and find that **second layer** that mammals love to live in. I walk around in it with them and help them to keep their balance in the unevenness and to help each other. My continuous self-coaching is crucial. I help them to experience the **second layer**. It’s life-giving. And as they get access to it, the ROI of this time seems clear.

Every day these people see and work with each other, and now they are giving each other a new experience, maybe even a way out of an historic **first layer** reaction that never really has worked very well. Who knew that so much personal growth and healing could happen at work?

It’s true that coaching isn’t therapy . . .

We’re not diagnosing or prescribing or spending hours unraveling old hurt places or billing insurance companies. As coaches we will invite people to glance at their historic patterns, stories and strengths, but our gaze always returns to the present and the future. However, as with a great therapeutic relationship, a great coaching partnership touches our hearts and motivations and sense of purpose in the world in some deep ways. It’s equally poignant. And when a coach invites, respects, engages with and explores a coachee’s emotional wisdom—without attachment to being right or fixing--the possibilities increase for the coachee’s clear and sustainable movement through the stages of change.

Do you remember in the Key Skills when we talked about **using the bright spots and defining stories of the person or team you’re coaching?** We’ve all got defining stories and historic patterns about how we first learned to survive and belong. Usually, those defining stories emerged as we paid attention to our reactive **first layers**. When a coach understands the power of slowing down, of being softly curious and of speaking simply, they can invite their coachees to glance back at their defining stories and then to move their gaze to the present, and to the reality they want to create going forward as they explore and use their **second layer** with people they care about and work with. It can be poignant.

As I drive away from the team meeting . . .

I get in the slow lane and do a little self-coaching. I’ve been ON for several hours and great things have happened. Now I pay attention to my own thoughts and to my own breathing. I think about what I need to reflect on as I head home or to my next coaching interaction. The people in both places need me to be present, accessible and responsive.

And I need me to be present! This is a big part of the deal—If I don’t attend to my own practices of reflection and self-care and to staying connected to my own colleagues, I’ll set myself up for resentment, diminished effectiveness and maybe even burn-out.

At the core of coaching presence is your ability to tolerate, even welcoming and using, big emotions—both your own and those of the people you coach. So where are you with emotion? In your **first layer**, what scares you? What sends you into Level I listening?

Is it the message on your old flag?

Or is it a cause or something deep in your own experience or convictions? Maybe it's political or personal or something that's a raw place somewhere in your own healing. Maybe it's an issue with which you see no gray area. Coaches, like good reporters, cannot fairly make their work about those things.

Years ago, I worked with a politician whose policies, I thought, would lead to the end of civilization as we know it. "I can do this," I thought. "I'm a professional." But she kept touching a nerve in my life and about five sessions into our work I caught myself starting to offer suggestions about what the politician should be thinking about and working on. Ultimately, *because* I'm a professional, I was candid with her about what I had found myself beginning to do, and why. We agreed together that a referral to another coach was a good idea and we partnered to close our coaching relationship and to create a strong transition.

When this happens to you, and it will, turn to your tribe and consult. And if you need to, make a referral. This just means that you respect and care for your deeply held—or felt--personal convictions elsewhere in your life.

As we continue on, we'll be asking you to examine your own life, to glance at your historic patterns and to then gaze at your own **second layer**--the layer that helps you know you belong, that we need you and that you are alive in the best of ways. When a coach can lead the way in being vulnerable, trust hits the fast track.

As a Cohort, we'll explore the application of all this to the growth of your coaching presence. Don't worry. In our upcoming sessions we're not going to freak you out, we'll just invite you to continue to test and learn, mostly with "ten percent shifts." As you build your life and maybe your family, what do you want written on your current flag?

We're in your corner.

Read more about it . . .

[Hold Me Tight](#). Dr. Sue Johnson. 2008.

[A Failure of Nerve: Leadership in the Age of the Quick Fix](#). Edwin H. Friedman. 2007.

[Brain Rules](#). John Medina. 2014.

[Say No to Negativity](#). John Tierney and Roy F. Baumeister. The Wall Street Journal, December 28, 2019. (A summary of their book, [The Power of Bad](#). 2019.)

[Meet You in McGinnis Meadows](#). Brook Mathewes and Scott Miller. [Psychology Today](#). January/February 2020.

[The Pursuit of Attention](#). Charles Derber. 1979. In this classic, Derber discusses "conversational narcissism." I.e. our tendency to employ the "shift response" in conversation ("*So, enough about me, what do you think about me?*") vs. the "support response."

What to Expect in Module II

“Coaching Presence and Skills Mastery”



32 Approved Coach Specific Training Hours + 7 Hours of Group Mentor Coaching

In Module II we continue to strengthen and dovetail your greatest tool which is—beyond all your skills, knowledge and methodology—your coaching presence. Whether your goal is to become an internal coaching leader or to begin building your own coaching practice, we will continue to explore your niche, your specialties and your sense of purpose.

We will meet through 15 two-hour sessions. These training hours reflect:

1. Twenty-three hours of direct and collaborative instruction.
2. More hours of peer coaching between our meetings that you may add to your log as pro-bono hours.
3. Seven hours of group mentor coaching in partial fulfillment of the ACC Mentor Coaching requirement. You need ten hours total before you can apply for your credential. If you miss one of these seven hours of group mentor coaching in Module II, you will need to make them up elsewhere before you can apply and there may be an additional cost. [This document](#) is the SeattleCoach attempt to demystify the ICF credentialing path.

As in Module I, participants need to plan on being present for a minimum of thirteen of the fifteen two-hour sessions. As before, in finalizing our dates, you may have to miss one, but we'll make sure you'll never miss two because of our scheduling agreements.

We'll cover a lot of ground in Module II. These are some major objectives:

1. Skills mastery: Each coach will be challenged to understand and use the skills introduced in Module I to the level of solid and fluent improvisation: We will also introduce a few advanced skills and methodologies and continue to work with the ICF Core Competencies.
2. Niches and specialties: These evolve as a coach grows, however each coach will be asked to begin defining a niche and specialty with which he or she would like to experiment. A great niche is a place where you know you can help bring learning and change—and where you will enjoy the people who seek you out. I will ask each coach to identify a possible coaching niche, research it, interview successful coaches who do that work and then include their findings in a “Next-Steps” Presentation in our final Module II meetings.
3. Similarly, we will continue to focus on each coach's personal and professional presence and how each one can increasingly use it as they coach individuals, groups and teams.
4. We will explore, illustrate and apply each ICF Core Competency and prepare for the ACC exam.
5. And, as mentioned above, we will complete seven full and documented hours of live-action, group mentor coaching and you will receive written feedback from your mentor coach.

As we move into Module II, you can expect us to deepen our use of “flipping the classroom.” The homework will allow you to take in new learning and to process it through your own wisdom and experience before we meet as

a team. This makes it possible to what a great team does best: to be a place of collaboration, safety, creativity and even of failure and recovery—to get hands-on in the tasks of assimilating what you’re taking in. When flipping the classroom works, you extend your learning out into the flow of both your peer coaching and into your existing work. Plus it’s more fun.

In Module II we will ask you to continue your peer-coaching partnerships for at least two sessions at a time.

Prior to our first Module II meeting:

- ☐ Think about this question: ***What are the top 2-3 virtues, values and practices that you believe contribute to the personal coaching effectiveness of the members of our Cohort?*** Please consider your choices and notice which ones have staying power in your awareness over the next few days. Jot them down and be ready to explain them to your colleagues.
- ☐ Purchase a digital or hard copy of [Working Identity](#) by Herminia Ibarra. And [click here](#) to review our rich SeattleCoach book list on Amazon.
- ☐ Finalize something with your web presence that will support your visibility either as an entrepreneurial or as an internal coaching leader (LinkedIn, a Facebook page, your company’s website or directory, or your personal website or landing page). In addition to giving you something tangible that will help you build your visibility, we’ll take a group photo at our first meeting of Module II for the [SeattleCoach Network](#) page and when you’re ready, we can link your name and that photo to your web presence.

***Congratulations on the completion of this
first part of our journey together!***

