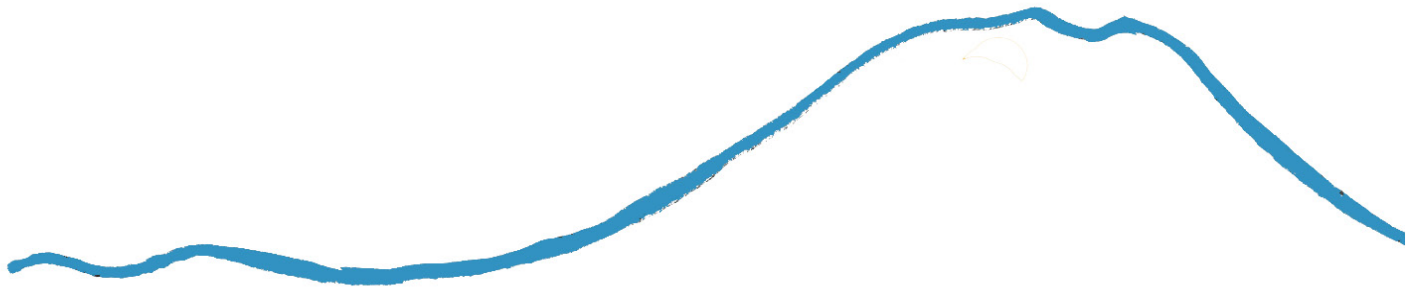


Module II

"Personal Presence and the Core Competencies of Coaching"



Doing the Craft. Being the Coach.

Module II:

“Personal Presence and the Core Competencies of Coaching”



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Review requests
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Certificates and Celebrating!

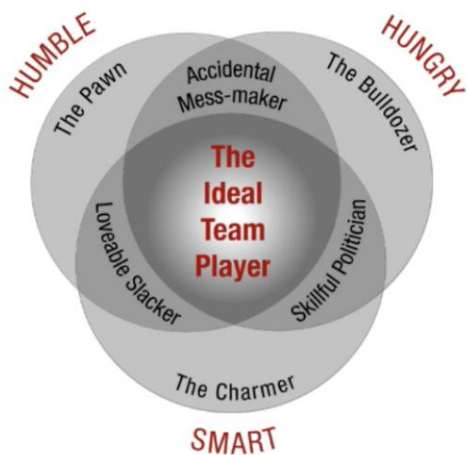
Remember, we will give you two versions of this Playbook: A hard copy and a .pdf. When you open the .pdf, you can click on “add notes,” to insert your own highlights and notes. And, again if you prefer to read on your Kindle, [click here](#) for instructions about how to send it over to your device. Again, the page numbers you may see in our homework emails may not match what your e-reader comes up with.

And for Module II: from the start we’ve asked you to use your own coachability and to think up your own coachable agenda in your work with your peer coaches. You’ve been getting some great coaching, right? If you run out of ideas and want to experiment with other coachable scenarios that have appeared through the years, put on your role-play hat and check out [this page](#).

Team Coaching with the Cohort: Cultivating and Leveraging the Energy, Ambition and Wisdom of Great People

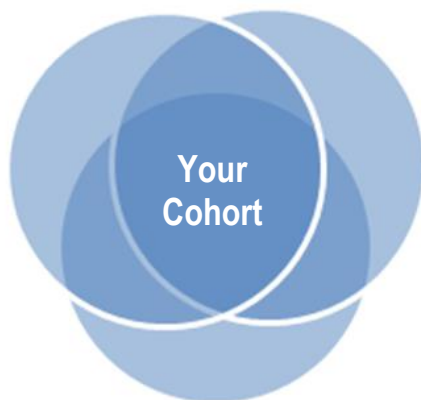
In Module I, we asked you to notice the elements of how you like to work, of your DATA and of what goes into your personal agreements and elevator “offers.” In Module II, we will go deeper, focusing heavily on your personal presence and development as a coach. As we wrap up Module II, we will ask you to talk to us about how “your way” is beginning to be reflected in your personal version of great coaching and of how you see your “next steps.”

Some of your answers to those questions will be influenced by the support and challenge you experience as a member of this Cohort.



Check out the diagram to the left. In his book, *The Ideal Team Player*, one of my favorite thought-leaders, Patrick Lencioni considered the enduring characteristics of his own high-performing team.

He also revealed what happens when a key element is missing—in a member or even in the system.



Now, as we begin the second half of our journey together, let’s build our own version. You are a key member of a unique circle of very talented coaches.

In light of that, 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?***

Prior to our first meeting, jot down a few of your hunches:

* From [The Ideal Team Player: How to Recognize and Cultivate the Three Essential Virtues](#). Patrick Lencioni. 2016. As with most of Lencioni's books, in this one you'll find a fable, a deep explanation of the model and specific ideas for application—especially if you'd like to grow as a team coach.

Using Working Identity, by Herminia Ibarra

"I can read my own story in this book." A SeattleCoach

Why this book. This book uses the topic of career change to address a larger issue: We are almost always in transition. We might call it change or healing or growth and it might be personal, professional or relational—or all three. When it comes to transition, and to our ever-shifting sense of things, it seems like we are either reflecting on what just happened, preparing for what we sense is just around the corner, or knowing that we are “in it” right now. As you read each chapter, my notes and questions might spur your thinking. As a coach your own reflections will help you to develop as a specialist in human change management.

In your homework emails in the weeks to come, I will ask you to read parts of this great book, to look for themes that resonate for you and then to do some writing about what you notice in your own life and experience of major transition. Sometimes we’ll talk together about your insights—but even when we don’t, your contemplation of my questions will boost the quality of your personal development, of your presence as a coach and of our work together.

* * * * *

- I. Read the Preface and Chapter One, *Reinventing Yourself*, then write two short paragraphs: The first summarizing what you decided to underline from this section. And second, write a brief paragraph about how you are shifting in your own life. What core convictions are emerging for you?
- II. Chapter 2: *Possible Selves*
As you read about “test-and-learn” vs. “plan and implement,” did any of your assumptions feel challenged? In reading about Gary and Charlotte’s experiences, where do you see them getting stuck?
- III. Chapter 3: *Between Identities*
The word “trials” has two meanings in this chapter. Major transitions take time, may feel unproductive and like “living inside a hurricane.” Write about your own experience of navigating the in-between-time, the “neutral zone” of a major transition.
 - ☐ How did you navigate the wilderness/neutral zone?
 - ☐ What coachable issues came up? (What were you happy to say goodbye to? Sad to say goodbye to? Dreams you had to say goodbye to . . .)
 - ☐ How did you prepare/rehearse trial activities, trial relationships, trial narratives (elevator pitches)?
 - ☐ How did you decide to talk to people about the change?
- IV. Chapter 4: *Deep Change*
“The difference between a job change and a career reinvention lies in a depth of personal transformation” that involves both the breadth and depth of your life. What is desirable? What is possible? Escaping a bad fit is easy, then the hard part starts. As you read the stories in this chapter, what challenges you?
- V. Chapter 5: *Crafting Experiments* (“There is no big change without emotion.”)
“By far the biggest mistake people make when trying to change careers is to delay taking the first step until they have settled on a destination.” This chapter is about “implementing the small probes and

projects” that modify perceptions and create movement without premature commitment. What ideas do you find here that help you to craft experiments and then evaluate results?

- ☐ What are your experiments and probes as you develop your coaching identity?
- ☐ What does it take to listen to your emotion and intuition as part of your intelligence?

VI. Chapter 6: *Shifting Connections*

Amidst all the thinking and experimenting, this chapter reminds us, “We cannot regenerate ourselves in isolation. We develop in and through our relationships with others.” What new or renewed connections do you need to develop? Any relationships to leave behind? The old voices will almost always vote for stability. How can you be a secure base?

VII. Chapter 7: *Making Sense*

“Fortune favors the prepared mind.” Louis Pasteur

Epiphanies, tipping points, crystallizing events, ah-ha moments, getting unstuck, putting it together . . .

“The moment when it becomes clear that neither the passage of time nor minor changes in behavior will improve the situation.” Going forward, the “leap” looks easier, even compelling. How do you recognize, respect and respond to such a moment in your life? How will you revise and tell your story?

VIII. Chapter 8: *Becoming Yourself*

“There is no substitute for constant exploration.”

Pay attention to the “steadily increasing advantage of learning, innovation and improvement.” Malcolm Gladwell in Outliers

Check out the illustration on page 162 and think of it as a life-long spiral.

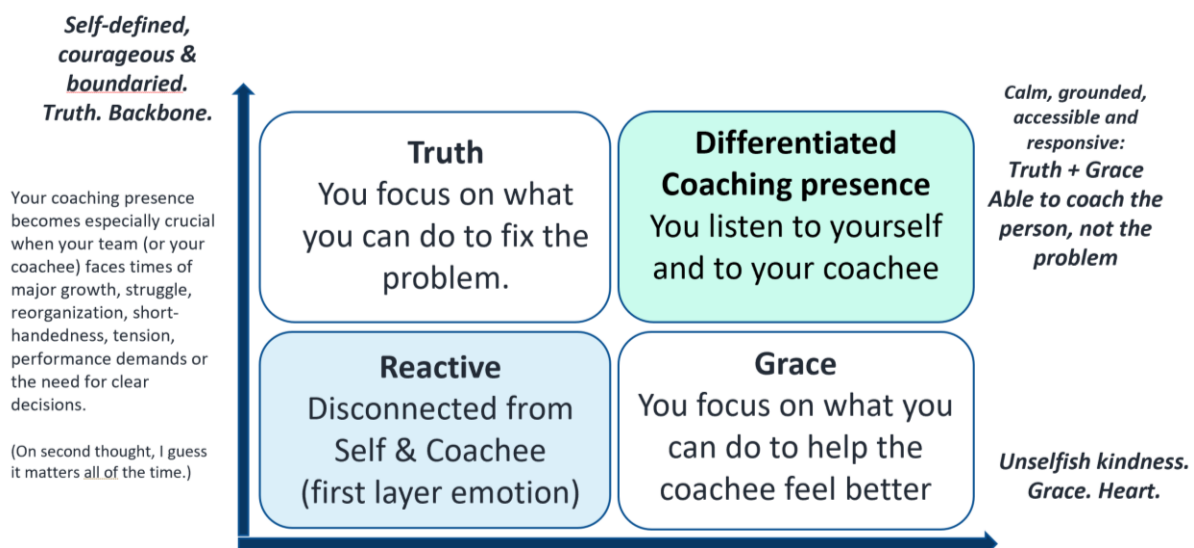
“It is a messy trial-and-error process of *learning by doing* in which experience in the here and now (not in the distant past) helps to evolve our ideas about what is plausible—and desirable.” Underline as you read pages 167 to 171 and write a paragraph about how you could use these “unconventional strategies” with your next steps.

Developing Your Coaching Presence

"In any situation, the person who can most accurately describe reality without laying blame will emerge as the leader, whether designated or not." Edwin Friedman

In Module I we focused on the essential concrete practices of “doing coaching,” and we wrapped up with a discussion of how to coach “Big Emotions.” And now, in Module II, we are moving our emphasis to your coaching presence, to your ability to “be the coach.” Our goal is to help you to grow in your ability to be fully present and engaged, coaching yourself through your own assumptions, emotions, your reflexive “defaults,” sensations and curiosity even as you coach another. Great coaches are always moving along a continuum from “knower” to “learner.” From a “fixed mindset” to a “growth mindset.” And great coaches are both optimistically aspirational and solidly grounded. They are contagious.

Using your own personal presence as a primary tool, you cultivate the ability to deepen awareness and discovery in your own life, in the lives of others, and in the larger systems you operate in—all at the same time. As you review the quadrants below, ask yourself the questions below: “What would it take for me to keep growing in my fluency with the upper right quadrant?” Think about it this way . . .



Think about these questions:

1. Back to that flag that flew over the house you grew up in: What has been your personal historic default? (What shows up when you're hungry, angry, lonely and/or tired (HALT)?)
2. What behavior could help you to make a “ten percent” shift in the direction of the Northeast Corner? Where/when/with whom would you experiment with your shift?

In Family Systems Theory, that upper right-hand corner is called “non-anxious presence” or “**differentiation.**” It's the cornerstone of systemic intelligence. This is any leader's most effective personal “home base”: You are calm and authoritative. You've got access to the **second layer** we were just talking about. You know how to listen to explore and how to listen to respond, balancing inquiry and advocacy. You know how to stand alone and to belong. Without self-preoccupation, you know how to listen to your own life too. You know when to support and when to challenge. You can say what needs to be said (like the stuff everyone in the room already senses), without blaming. You coach the person more than the problem. You use what my friend Peggy Gilmer (who sometimes coaches with an assist from her horses) “**minimum essential influence**” i.e. “*Tough as I need to be, and as soft as I can be.*”

- ❖ Differentiation means you can be a separate “I” while remaining connected.
- ❖ When things go sideways, humans tend to look for a scapegoat—someone to blame. Differentiated people are open to the possibility that they are a participant in the drama triangles around them (and not just an aggrieved victim). They stay engaged (rather than “cutting off”) and can be less automatic and anxious. They coach themselves to be more voluntary and intentional.
- ❖ Leaders who work on their own self-differentiation challenge their followers to do the same.
- ❖ Differentiated systems are better able to stay connected in times of pressure and disagreement and to engage in support and challenge that is timely, specific, respectful and future-oriented.
- ❖ And differentiated leaders are able to embrace their “belonging-longing” as they see the role of other people in bringing more life and awareness.

Great coaches work hard at growing their emotional and social intelligence and at understanding how humans and human systems work. Great coaches are interesting. They are playful. They inspire safety.

Note: Once you’ve completed Module II, you will have options for continued development in graduate Cohorts where we focus even more on your personal systemic intelligence with individuals, groups and teams, on building your business and brand—and on professional credentialing. As you navigate those complex processes and relationships, we’ll continue to talk about how to build alliance, agreement and agenda—and how to honor confidentiality in each of those settings.

Read more about it . . .

[Mindset: The New Psychology of Success](#). Carol S. Dweck. 2007.

[An Everyone Culture: Becoming a Deliberately Developmental Organization](#). Robert Kegan. 2016.

[Immunity to Change](#). Robert Kegan. 2009. [Click here to listen to his 14-minute video overview](#).

[Executive Coaching with Backbone and Heart](#). Mary Beth O’Neill. 2007.

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

When Coaching Presence Wins: A SeattleCoach Case Study

What would you do when you ask a coachee, “What do you want to work on?” and they just don’t have a ready answer—but you know they are coachable. That was Coach Kim Jarvis’ (Cohort #16) experience. And with her permission, this is the note back to her from a very satisfied customer:

Kim Jarvis is my Professional Coach and it is my distinct pleasure to give her my highest recommendation. Kim has not only enriched my professional life, she has also enriched my personal life.

Our work together was complex; in the sense that the goals I had set for myself were truly uncharted and complicated by interpersonal challenges with key individuals that would be critical in the achievement of my goals. I needed someone who could take all the facets of my undefined plan and make sense of the whole mess.

It took Kim to make that happen. She was able to see my struggles and provide just the right mix of insight and guidance to allow me to celebrate my own conclusions. In her line of work, I can see it being a MUCH faster process to provide the answers, but as a recipient of her professional and caring coach approach I’m glad she invested in MY process rather than focusing on quick wins. I had to work for my victories and realizations which made them meaningful and actionable.

Further Thoughts on Coaching Presence

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

"Psychotherapy helps you get rid of neurotic (i.e. habitual, automatic, irrational) misery so that you can use your strength to fight ordinary misery i.e. the relentless challenges of life." Sigmund Freud (Patty's paraphrase)

"In any situation, the person who can most accurately describe reality without laying blame will emerge as the leader, whether designated or not." Edwin Friedman

Please begin by reading or listening through page 16 in The Essential Coaching Leader.

My new coachee looks intently at me and asks, "Now how does this work?" We've interviewed each other, decided we're a good match, discussed his agenda and outcomes and have agreed to dig in together. I smile back, consulting for a moment that place in my heart where I keep my convictions about why this work matters so much--to me, to the organizations I support, to our culture and to the earnest and good man looking at me.

* * * * *

There are few things as timeless and honored in all successful human cultures as a combination of gratitude, perspective, compassion and responsibility-for-most-of-what-happens-to-you, all in the context of some solid human connections. As mostly mature grown-ups, we know that those things are the indispensable ingredients both of our best decisions, to our mental and emotional **resilience** and agility and to developing empathy through the course of a happy life. And they are also key to every successful coaching partnership I've ever had.

Resilience vs. The Ruts

We can spot the elements of resilience (gratitude, perspective, compassion and responsibility-for-most-of-what-happens-to-you in the context of some solid human connections) in each other from a mile away. We can also spot their absence in people who tend to be stuck in **the rut of chronic fragility**, grievance, victim-identity and entitlement. Three hallmarks of this rut (aka personal and team gridlock):

1. *An unceasing focus on outside causes as the reasons for their unhappiness,*
2. *Determined efforts to convert other people to their position and*
3. *The inability (or unwillingness) to relate to people who see things differently.*

Unexamined empathy supports and aligns with people who share your biases and but it might be contemptuous of those who don't. Unexamined empathy usually fails to distinguish between offense and actual harm. Unexamined outrage is easy, reductive and common.

Making matters worse, there's **another related rut: that tendency in our culture to get numb to the hard stuff**, getting addicted to substances, technology and to finding our main sources of comfort/dopamine outside of our relationship with ourselves, with other humans and maybe even with God. This rut reduces our immunity to what C.S. Lewis called "the problem of pain" and Dr. Freud called "ordinary misery." It gets worse. If you're stuck in either rut (they tend to go together), you're less likely to have good people in your corner when you need

them. You might bond with other aggrieved people who are as unhappy and mad and stuck as you are but that gets old.

We all know older people who shine in their resilience—not because their lives have been easy—there’s usually been plenty of “ordinary misery.” But because of the thousands of choices they’ve made over time they have developed and deepened “gratitude, perspective, compassion and responsibility-for-most-of-what-happens-to-you” in their personalities. We all know the other kind of older person too. I think I figured this out as a child just by experiencing my two (very different) grandmothers.

This is a Good Place to Say that Excellent Coaching is Not . . .

1. An endlessly rosy belief in the radiant potential of human goodness.
2. A spiritual belief to “let go and let God.”
3. A mantra of exclusively happy thoughts and messages.
4. The elimination of any recognition of threat, challenge, weakness or evil (cover ears, go la-la-la).
5. Indulgence of and organization around the chronically aggrieved.

Excellent coaching has become a “thing” at this point in our history because I think, as a culture, there is a longing to course-correct: to regain control over our attention, to better acknowledge character and behavior, to patiently build depth, to stay present and curious in times of disagreement and to stand up to obstacles and even failure, coming back stronger. What if you got to bond with people that sought stuff like that instead?

Are You a Good Grownup?

One of the keys to the development of resilience seems to be the presence of a “good grown-up.” Beyond anything else, that’s what a good coach needs to be (no matter how old the coachee): a person who, as a life practice, is the architect of his or her own character, resilience and enduring happiness; a person who listens with both grace and truth to their own life. Without that practice, there can be no reliable coaching presence with anyone else. Nor, in fact, can there be any truly ethical coaching.

Great coaches know how to earn trust. And they are contagious in their enthusiasm, not necessarily because of their command of data or technique, but because of their ability to be both separate and connected. Think of a warm handshake between two mature people: clearly separate and clearly connected all at the same time. Think about how refreshing this is in a culture where involuntary handshakes--or stand-offs--are all too common. Great coaches know how to build warm-handshake relationships. Separate. Connected.

Once you begin to become a reliable coaching presence, the question becomes, how do you help individuals and teams to develop their own warm handshakes: the ability to stay curious and connected in disagreement and crisis without insisting on the fake peace of involuntary compliance? And can you help people to learn that even as you focus with them on their outcomes?

We know that coachable people are quite capable of looking “below the water line” to identify and develop their strengths and sense of purpose and to explore and experiment with their obstacles, outcomes and next steps. I know, it’s true--some people are born with sturdier constitutions, or they’ve had the advantages of better parenting or better cultures. Some are born into families where they are either mostly ignored, or mostly

indulged. Both kinds of dysfunction leave children unfairly vulnerable to the ruts I mentioned and less able to recover from and course-correct from “ordinary misery.”

But here’s the deal: No matter what the starting point, if you can help the person you’re coaching to focus on their strengths, assets and aspirations just a bit more than on their obstacles and inabilities, they can usually pursue mastery in something (along with more resilience, gratitude, perspective, compassion and self-responsibility). It’s about the ratio (keep reading). The oldest and most appreciated of story lines through the centuries goes like this: “*A hero goes on a quest.*” The stories we love are stories of resilience, of overcoming obstacles and of continuing on, stronger and wiser. They begin with a hurricane and end with hope. Do you know any great personalities who haven’t spent time in, and found their way through, a personal wilderness? I don’t. And if you’re reading this, I know you’re one of them.

* * * * *

I looked back at the exceptional person before me. “Well,” I said, “I’m the expert on some things—like asking questions that are big enough to matter--and listening carefully to the answers that come back. Like uncovering and celebrating your strengths and stories and style. Like finding out about your vision and how you like to lead and how you see your next steps—the ones that you believe to be both possible and desirable. Like challenging you to go after the hard stuff so you can get what you want—and then watching how hard you’ll work. But I will always consider you to be the expert on you. This work will take great resilience.” He smiled back at me, “That’s exactly what I want to get better at.”

Real Life and the Impact of “The Rule of Four”

Since around 2001 at the University of Pennsylvania, researchers have been studying a phenomenon that has been in plain sight for millennia: That human brains, find it easier to criticize, blame and look for the grim, than to see the virtuous, the good and the overall positive trendline. We've got a "negativity bias" that helped us to survive, but also makes us hard-wired to focus on the dismal, the discriminatory and disconnected—even though we live in amazing times and are surrounded by other humans, most of whom are trying their best most of the time every day.

We're also hard-wired to connect, the but with our negativity bias, it takes discipline to keep our balance.

The researchers began with a question: *We've got a manual for categorizing and diagnosing human psychiatric pathology (The Diagnostic and Statistical Manual of Mental Disorders), what if we developed a categorization of human virtues? That is, virtues that are honored and cultivated worldwide?*

And more recently, they turned their attention to the question of what it would take for human brains to challenge and counteract our deeply ingrained “negativity bias.” Interestingly this research has coincided with the explosive growth of professional coaching.

The consistent finding (I've noted several studies and researchers below) has been **The Rule of Four**: It generally takes the experience of four “positives” in order for a human brain to grow new strength or mastery or passion from the experience of one “negative.” This is, of course, not applicable to every situation we find ourselves in, but it applies solidly to most focused coaching conversations.

Life is tough. And life is a relentless teacher. Our hearts get broken. We fail. We suck at stuff. We become exes and victims and sometimes we hurt other people. Sometimes we must protect ourselves from dysfunction and downright evil. The challenges and resistance we get in the course of life, both internally and externally, are part of the deal. Think of those relentless challenges, emotions and obstacles that life brings as the negatives. In our own lives and in our work as coaches and leaders, the goal can never be the elimination “ordinary misery.” The goal cannot realistically be the elimination of risk or chronic grievances, nor can it be the creation of life-long emotional warning labels and dependency. In addition, there's no human emotion or obstacle that can be forever shunned or pathologized or avoided.

But we've all experienced the **first layer** negatives where, for example, an automatic experience of resistance or conflict simply brings fear, anger, shame or discouragement.

“The Rule of Four”

In order to keep our balance, over time we need about four positives (hits, thoughts, events, encounters) to create the possibility of resistance becoming true and useful. The goal is to identify and then leverage strengths and assets in the face of challenges.

For years I rowed competitively, mostly in the big “eights” you see on Lake Union and Lake Washington. It's a beautiful sport that, done well, is full of metaphors. Here's one of my favorites: It is resistance against a rower's oar that drives a racing shell forward—but only if she gets the ratio right. The rhythm must be a minimum of a 4:1 ratio between a skilled and balanced recovery (the smooth glide that happens when the blades are out of

the water and swinging back for the next “catch”) and the connected, explosive and muscular “drive” that begins when the rowers “catch” the water in unison and pull against the resistance of the water. In rowing and in life, 5:1, glide to resistance/challenge is even better.

Every rowing coach knows this: when glide blends with resistance/challenge in a lesser ratio, of 2:1 or 1:1, learning and accomplishment, like a racing shell, slow down. It may look full of effort, but it’s not efficient. And it’s not fast.

If you’ve ever been in a relationship where people mostly listen to respond rather than listen to understand, you know that their conversations might sound splashy and energetic, but connection and movement rarely happen. There’s not much glide.

When people live with chronic stress (remember the **first layer** of Big Emotion?), their bodies respond with the same physiological and behavioral readiness (heart rate, sweat glands, shallow breathing) as a person facing a life-and-death scenario. The demanding boss barks, “*I want you at that meeting,*” and the team member reacts involuntarily from the same state as a human facing a predator (fight: “*Again?!?*” Or flight: Looking down at their phone, “*I’ll try to be there.*”). And safety and trust, collaboration and learning diminish in both people.

Chronic vigilance is just as harmful as acute vigilance is beneficial (like the clear direction you shout in an emergency). And both are contagious. The problem with chronic vigilance is that learning, connection, kindness and creativity become less possible. One of our coaches wondered if there might be a correlation between chronic vigilance “and stupid.” Hmm. Maybe.

“Until people’s minds are at ease,” (remember the **second layer** of Big Emotion?) writes David Rock, “focusing their attention on your goals is an uphill battle.” He was building on the thoughts of my favorite rabbi/thought-leader, the late Edwin Friedman, “Others can only hear you when they are moving towards you, no matter how eloquently you phrase the message. In other words, as long as you are in the pursuing, rescuing, or coercive position, your message, no matter how eloquently broadcast, will never catch up.”

Here’s a bottom line: Our brains have no trouble looking for the negative. That’s the easiest and most automatic thing they do.

A relentless focus on inadequacy and blame may create a reaction, but it doesn’t help us to learn or to form deep bonds or to take calculated risks. When, instead we give attention to strengths and aspirations, to creative initiatives, we catalyze learning, creativity, connection—and even belonging (remember **belonging-longing?**). That, of course takes practice and discipline and attention to team culture as we shift our resources and sense of reality to gratitude, opportunity and possibility.

Our core job as coaches is to master ways of creating both the conditions and the behaviors required for more trust, engagement, openness, calm and thus learning. When we do that, we set the stage for Level III conversations. If we are both safe and compelling, the people we coach are biochemically able to take in more support as well as more challenge and to deepen their resilience, gratitude, perspective, compassion and responsibility. These are the conditions that foster hope and “neuroplasticity” that happens throughout life.

As coaches and leaders, we train much our attention on our coachee’s strengths, virtues, possibilities, learning, connections, effort, resilience and positive stories. Again, it’s never that we ignore obstacles, fears, past injuries, growing edges, performance gaps and structural challenges (remember, life is relentless). It’s just a matter of

focus and leverage. Again, the negatives might wake us up and challenge us, but the positives make sustainable change possible.

What the Rule of Four Looks Like in Practice

At this point in your life you've learned some things about how to weather storms. You're not chronically offended. You don't scare easy. You know that healthy emotional immunity stands up well to sorrow and adversity. You're resilient and as a friend of mine says, "You're probably either up or getting up." You've got a big heart, but you also know that trying to offer too much empathy (aka rescuing, commandeering, propping up or fixing) can result in what one presidential speech writer called "the soft bigotry of low expectations." Maybe you're learning that compassion, like that separate-and-connected warm handshake, is better.

You have some idea about what's changeable in your temperament. And you've made peace with some things too.

I ask all of my new coachees and coaches-in-training to take [The VIA Survey of Character](#), an assessment designed to by those researchers at the University of Pennsylvania to help people to identify, develop and then to use their best character qualities in pursuit of their goals. One key finding is that a "capitalization model" which focuses on strengths is superior in important ways to a "compensation model" which focuses on remediating deficiencies.

Maybe you have a spiritual practice, a faith or a belief in an intelligent, affectionate creator. This isn't required for a happy life, but if you do, it seems to bring an additional advantage, one that sharpens your focus on the pursuit of goodness and wholeness. My own reminds me daily that my life is big and my life is short and that a vast affectionate creator cares about it.

Think about your own "capitalization model"—and what you know about increasing it. Having answers to some of the following questions might help with your net-gain:

- *What have you noticed about your way of earning trust and allowing others to know you better?*
- *What do you know about how you "land" your personal expressions of gratitude, kindness and respect?*
- *How do people know when you're paying attention to them?*
- *What's happening when people know you've truly forgiven them?*
- *How do people know when something is hugely important to you?*
- *Who's in your corner? (And, maybe a funny question, do they know how much they mean to you?)*
- *What is your process of making important decisions?*
- *When and how do you know you need to step back, reflect, process and recharge and then return to a conversation?*

Your answers to these questions are most likely to show up over time rather than in single conversations. And that's good news for us life-long course-correctors who are sometimes inelegant, impatient and self-centered and need forgiveness and reconnection.

Here are a few examples of what coaching sounds like when you practice the "glide" and "resistance" of the **Rule of Four** over time. I'll include examples in **BLUE** from a few of our Key Skills.

Glide (4) : Resistance/Challenge (1)*

Say what you see: “What just happened?”

Leveraging strengths: “What did that take?”

Asking permission: “Can I give you my hunch?”

Witnessing: “You did it! I’ve been watching your resolve.”

Statements of impact: “Can I tell you how that lands?”

Championing: “Have you prepared well? Do you want this? Do you know we have your back?”

Say what you see: “You might be capable of more.”

Take **accountabilities** seriously: “You didn’t do it. What did you do instead? What you make of that?”

Request and challenge: “Yes? No? Make me a counter-offer.”

Statements of impact: “Can I tell you how that lands.”

Being Brave: Speaking directly with transparency, immediacy & respect, “I’m not sure you took in what I just said.”

**Always remembering that life itself usually brings more than enough resistance and challenge to each of us. Start with kindness as you help your coachees know how to face it.*

Coaches are masters at exploring what works, maybe what has always worked in safe-enough human systems and societies. And whatever your temperament or background, you already know some of the behaviors that work best given how we humans are wired. Teams that work together toward operating at Level III find ways to get better at:

- Continuing to breathe, recover and reset in the face of difficult emotions
- Helping each member to explore his or her own personal way of doing those things
- Quickly noticing resistance, disagreement, even the need to create a boundary
- Staying connected and curious, inviting more conversation about others’ underlying assumptions and experiences
- Helping members to learn the warm handshake: to be separate and connected at the same time
- Inviting more collegial intelligence into shared work
- When necessary, apologizing, reconnecting and repairing damage

Leaders and teams that cultivate a positive rhythm of glide to resistance/challenge in the work and structure of their teams foster systems that course-correct and learn. Systems that are also both contagious and attractive.

In human systems, something is always “catching,” and we get to decide what that is.

Read more about it . . .

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.)

Barbara Fredrickson's overview on YouTube. (An eight-minute video interview). And a related article in Forbes, "Seven Crippling Parenting Behaviors that Keep Children from Growing Into Leaders."

HBR on The Neurochemistry of Positive Conversations.

Conversational Intelligence. Judith Glaser. 2016.

The Advantage: Why Organizational Health Trumps Everything in Business. Patrick Lencioni. 2012.

Choke: What the Secrets of the Brain Reveal About Getting It Right When You Have To. Sian Beilock. 2011.

Brain Rules. John Medina. 2014.

A summary of the research behind the VIA and "The Science of Character." (An eight-minute video).

Simon Sinek on Millennials in the Workplace. (A fifteen-minute video interview).

Your Brain at Work. David Rock (especially Scene 14). 2009.

A Failure of Nerve: Leadership in the Age of the Quick Fix. Edwin Friedman. 2007.

The Fifth Discipline. Peter Senge. 1990.

Presence: Bringing Your Boldest Self to Your Biggest Challenges. Amy Cuddy. 2018.

Working with Presence. Daniel Goleman and Peter Senge. 2007.

Mindset: The New Psychology of Success. Carol S. Dweck. 2007.

An Everyone Culture: Becoming a Deliberately Developmental Organization. Robert Kegan. 2016.

Feedback That Works

Feedback has become one of most dreaded of words. Whether you are offering or receiving feedback, it can be an unhappy proposition. Most of the professionals I've worked with have been trained to deliver the (usually) uninvited "feedback sandwich" ("praise-correction-praise" which obviously violates the "rule of four").

Feedback that works builds on the coach or coaching leader's understanding of:

- "Big Emotions," on their understanding the power of
- Their coaching presence and on application over time of
- The Rule of Four.

When couples, friends, colleagues and teams make it a point to build and bank strengths and assets in a challenging environment, they connect and learn better and more sustainably. Human brains must be psychologically safe-enough in order to sustainably learn from each other. Not bubble-wrapped. Just safe enough to try things.

Feedback that works is works draws from a bank of trust that grows over time. When couples, friends, colleagues and teams respect the bank and make regular deposits, it is increasingly possible to constructively talk about the rough spots with each other. The rough stuff might wake us up, but it is our deliberate, habitual orientation to strengths, virtue, possibilities, support, opportunities, course-corrections, wise risk-assessment and connection that make recovery and learning sustainable.

Recently, I was listening to a business owner—a good coaching leader—as he provided some timely course-correction to a valued member of his organization, a customer-facing team leader . . .

Biz owner: *"I know you care about doing the job right, you just have this one little thing," (he smiles and his voice gets soft).*

Customer-facing team leader (CFTL looking sheepish): *"My cursing?"*

Biz owner: *"Yeah."*

CFTL: *"That's just how I am. The people I hang out with, that's just how we talk, that's just how we are."*

Biz owner (listening): *"I want you to change your behavior." (He pauses, CFTL listens and nods.) "I'm very protective of (the business's) image. The last thing I want is for people to think we're all about profanity. Would that be good for business?"*

CFTL: *"Possibly not and that's something I could work on."*

Biz owner (pausing and smiling): *"Good to hear."*

CFTL: *(laughs easily)*

Biz owner, returning to the larger agenda: *"OK. We were talking about the performance system I've created . . .*

Looks easy, doesn't it? But these two had a lot of trust in the bank. Did you notice? This business owner had a hunch that CFTL already knew what he was going to bring up. He did not begin with that usually mistaken belief that *"I know, and you don't."*

Drama and hard feelings diminish when there is good connection and on-going communication over time. With these two I didn't see very much high blood pressure in the room. The biz owner used himself, his values and

the trust that he'd cultivated with CFTL as he described his personal response to her behavior. Then he spoke the truth directly and made a request. CFTL sensed his respect and directness and responded to it.

In watching their connection and interaction, this proved to be far more powerful than if the biz owner had been indirect or demanded that his CFTL simply comply with “the rules.”

Respectful directness within a trusting relationship even when it's tough, invites people to evaluate what is possible and desirable in making things better.

It's common sense: When people who are living in safe-enough conditions cultivate a habit of behaving in a voluntarily calm and connected way, mostly practicing the **Rule of Four**, relationships do better. And, by the way, at work, where we spend most of our adult waking hours, there is a clear ROI when a high-performance team identifies and commits to positive behaviors that are clear and measurable, frequent and steady. Especially in the times when situational conflict becomes intense.

When I work with teams to establish rules of engagement, I usually assume that I'll encounter some Big Emotion. So, I encourage everyone to **slow down** (remember, **first-layer** reactivity is fast and I want quiet amygdalas so that we could get to the **second layer**), to speak with **soft curiosity** and to keep things **simple and uncluttered**.

These are the SeattleCoach hallmarks I teach for practicing generative feedback:

1. You speak from calm authority, from your authentic grace-and-truth coaching presence, using yourself, your questions and statements of impact and being open to learning and being influenced.
2. If you need to, you give yourself time to calm down. Once your calm authority has returned, you speak as closely as possible to the “event” or observation. It's rarely useful to save up reactions for the next 1:1 or annual review.
3. You speak with curiosity and specifics to what is repeatable, changeable and/or growing (a 10% shift?).
4. Over time, your Level III communication reflects a focus on strengths.
5. You speak to the values and outcomes your coachee/employee identifies. Maybe with an eye toward your shared deliverables. Great coaches remember that everyone's version of “excellent” is a little bit idiosyncratic.
6. And, of course, you speak with respect and, unless the house is on fire, you are unhurried.

I recently joined this business owner, his “CFTL” and the rest of his team for an offsite where they hammered out and committed together to a few things that they knew would strengthen their practice of the **Rule of Four**. Interestingly, many were related to their meeting strategy. Here's what they came up with:

- *Devices off, beginning five minutes before we start so we have to look at each other instead*
- *When we're together we get out-loud about the stuff we've done that took extra character and effort—our own and each other's*
- *And when we get out-loud about the hard stuff, our disagreements, where we need help—we slow down a little, working at staying engaged, curious and pragmatic*
- *We'll in some way ask “permission” before giving feedback and advice*
- *We'll work on balancing advocacy with inquiry—and congratulate ourselves when we do better*
- *We'll show each other the respect of responding to messages within twenty-four hours*

- *And all of us will be in charge of keeping our promises*

This leader and his team know that the challenges of their shared work are unremitting and that deploying ideas like these will boost their ability to connect, to collaborate, to stay curious and compassionate—and to improve their business outcomes.

Appreciative Inquiry: Operationalizing Strengths As You Coach a Group or a Team

Appreciative Inquiry (i.e. the other “A.I.”) is about the search for the best in people, their organizations and the relevant world around them. A.I. is the deliberate discovery of what gives “life” to a system when the people in it are most effective and most constructively capable in economic, systemic and human terms.

A.I. is the art and practice of staying curious about a system’s capacity to apprehend, anticipate and heighten positive potential, operationalizing each person’s strengths and connections. People and systems that practice A.I. tend to succeed in the alchemy we all look for in our careers: The ability to make money, have fun and do good all at the same time.

The big A.I. question: “What’s working and how can we do more of that?”

What if someone followed you around, capturing a highlight reel of the moments when you were brilliant? Let’s say that the reel wouldn’t include your flubs and missteps and dropped balls, just the times when you were energetic, enthusiastic, relaxed, connected--and very effective. And then, what if our filmmaker showed your highlight reel to your team? In fact, let’s say our filmmaker shot a highlight reel for each of your colleagues and you got to see their best moments too. I know it would be fun and encouraging--we’re all suckers for praise. But what do you think would happen to your learning and to your performance? To your personal version of excellence?

That is exactly what the founding coach of the Dallas Cowboys, Tom Landry did with his struggling team over fifty years ago. Following six losing seasons in the 1960’s in front of fan base that became demoralized by the assassination of President Kennedy in their city, he figured out that each of his players, like you and me, was capable of getting it wrong in a zillion different ways. But he also figured out that if he could catch his players being brilliant, getting it right in his own position and in his own way, he was likely to do it again. Landry started bringing highlight reels to his team meeting—sometimes replaying them in slow-motion. Magic happened. His expansion team followed their six losing seasons with twenty winning ones.

In its broadest focus, A.I. helps teams to discover what they do to bring more intelligence, learning, creativity, collaboration, better interpersonal behavior and fun to their work together. Behaviorally, A.I. is the art and practice of asking questions that strengthen a system’s capacity to apprehend, anticipate and heighten its positive potential. You might say that A.I. helps teams to operate at Level III.

As coaches we can, of course, practice A.I. every time we “coach the person or team, not the problem,” and when we are in the role of coach-facilitator with groups and teams and even families, A.I. can feel like magic in the tasks of:

- ☐ *Identifying a positive change agenda like a new project or performance goal, a new team agreement, or new learning and development goals,*
- ☐ *Helping a team to tell its story to new members—and welcoming them to add to the story,*
- ☐ *Creating valued, vivid, vital and vibrant images of desired futures and then*
- ☐ *Developing strategies and identifying resources for moving forward into those futures,*
- ☐ *Recognizing and acknowledging the strengths and assets that express with team values and create a safe-enough environment for both advocacy and inquiry,*
- ☐ *Reframing a deficit-based narrative into a strengths/assets-based orientation,*

- ☐ *Moving from reactivity (listening only to respond) to self-differentiation (listening to understand and explore) and then*
- ☐ *Moving toward sustainable implementation of both the process and outcomes*

In addition to the traditional S.W.O.T. approach (*i.e. an acronym for “Strengths, Weaknesses, Opportunities, Threats”*) someone has suggested S.O.A.R. as an acronym for the A.I. stages of exploration and finding next steps: *“Strengths, Opportunities, Aspirations, Results.”*

1. Strengths

Appreciating “what’s working?” This stage may involve lots of conversation, interviewing, story-telling: *“What have we overcome, learned, accomplished? What are our best stories?”*

- a. Considering all your objectives, what are you proudest of? What have you accomplished? and What are you doing that works? Give yourself credit for every little thing you do that brings you a demonstration of success, to even in small degrees, in any work situation.
- b. Now think beyond your given objectives. In your work and as a member of a team, what experiments, accomplishments—even generative failures—are you proud of?
- c. What contributed to those things? How’d you do that? What fostered the learning and progress? What do you build into your environment that allowed you to do your best work? What team virtues and behaviors did you identify and agree to as a team?
- d. Think about yourself at the beginning of this project or chapter and the person/org you are today. How have you grown in your personal and organizational effectiveness? What specifically did you do that helped you to get better? The things you identify individually and as a team may have occurred at work, at home, individually or in your team relationships.

2. Opportunities

“What’s possible? Observable? Coming up? What could be?” This is a stage for reviewing our calling and values, for stretching our imaginations and outcomes.

3. Aspirations

When we stretch our imaginations: What could be? What do we choose? Outcome-wise, what needs to happen in the coming months in order for us to say we’ve had a successful period? This can become a powerful time of aligning values, structures, mission with what’s achievable. To make yourself even more effective in the future, what do you want to do: More of, less of, same as? Of all the items you listed and describe, which are the ones you will act on?

4. Results (desired)

“How do we build on this? And what can we bake-in? Along the way, what can we keep from this process as we’ve built more of a learning, appreciating organization?” What support do you have to do the things you identified? (Money, time, training, coaching, access to subject matter experts and support staff, equipment, materials, etc.) What resources do you have outside of yourself/your company?

When I’ve got a day with a team that wants to deepen the trust and effectiveness of their work together, as always, I pay attention to alliance, agreements and agenda. I begin with a brief introduction to the Positivity

Ratio and to A.I., inviting interaction with the material. Then, continuing to build trust and working at Level III, I invite the team into a conversation about their personal stories, their shared stories, expectations, values, agreements about how they will work together and their desired outcomes.

As coaches use Appreciative Inquiry with groups, teams and families, as well as in individual coaching, the “agenda” begins to be flavored by what works, by better alternatives, even by visionary and hoped-for outcomes along with personal and team learning. A.I. is inquiry into the “art of what’s possible” beginning with appreciation. Used well, it realistically identifies what is most desirable, possible and compelling and provides a learning experience that will remain in the memory and behavior of both individuals and teams.

Read more about it . . .

[Shawn Achor’s TED Talk, The Happy Secret to Better Work.](#)

[Appreciative Inquiry Handbook: For Leaders of Change.](#) David L. Cooperrider and Diana Whitney. 2008.

[The Power of Appreciative Inquiry.](#) Diana Whitney & Amanda Trosten-Bloom. 2010.

[Feedforward.](#) Marshall Goldsmith. 2011.

[The Advantage: Why Organizational Health Trumps Everything in Business.](#) Patrick Lencioni. 2012.

Your Vocáre Compass: One Way to Soul-Search and Self-Coach Over Time

"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

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

"I quite like that I haven't done 'good enough' yet." Sir Paul McCartney (at age 78)

"I insist on a lot of time being spent, almost every day, to just sit and think." Warren Buffett

"Experience is a hard teacher because she gives the test first, the lesson afterward."

Vern Law, a pitcher for the Pittsburgh Pirates in the 1950s and 1960s

"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

Now for Some Application of Appreciative Inquiry to YOU.

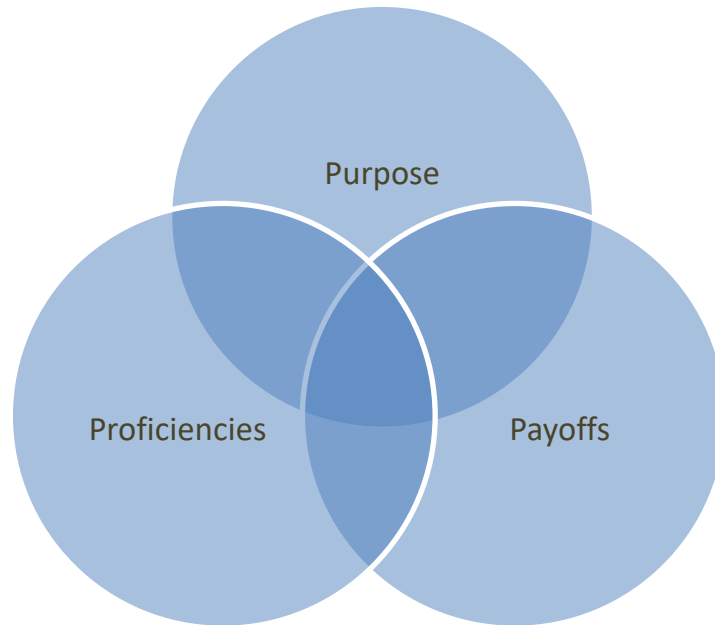
How do you figure out what you were made to do? And how do you attend to your journey so that your gifts and values and legacy are maximized? The English word "vocation" has grown a little coolly practical, but through the centuries, the Latin verb that inspired it, "vocáre," has carried the essential meaning of being called to a specific kind of work, to a craft or maybe to a master. For some, a sense of calling is a spiritual aspiration. For others it's about "fit" and the paradox you've probably experienced at times of effortless hard work.

Theories abound about how one succeeds at this treasure hunt: Is it a divine epiphany? Or logging "10,000 hours?" Or "following your bliss?"

My theory is that it's mostly about paying attention to your life and getting useful feedback from good people. It's an iterative process.

For decades, I've worked with people who see their lives as a deep stewardship, people who are very serious about examining their gifts and abilities and motivations--and the question of their "calling." From thoughtful millennials to mid-career professionals, to the wise elders who regularly tell me they're "not done yet!" the people I work with are very serious about finding and refining their path for the limited number of years they have left on the planet.

Think of Three Core Incentives and of the Places Where They Intersect



Proficiencies.

What is the work that, up to this point in your career you've gotten pretty good at? Maybe you love it, maybe you love parts of it. What is the craft, the subject matter expertise (SME) for which you are already known even as you begin to embrace your identity as a professional coach? How will you use it as a coach? How does your SME inform the niche you might want to serve? How does your SME inform your Level III questioning and listening? Could your SME be something around which you'd build a workshop--where you introduce, explain and illustrate a bite-sized chunk of great content and then coach a group or a team as they metabolize it?

Purpose.

If Circle #1 is about your "What," Circle #2 is about your future-focused "Why". Maybe you notice it at the end of a very satisfying day in which you know you have contributed, served and lived out your big values. You lost track of time a little. Maybe you know deeply that you have developed or championed greater efficiency or order or delight or a team that works well and happily together. Maybe you lead an organization that employs hundreds of people who love what they do and act like its owners. If you have a spiritual tradition or practice, your sense of purpose will feel aligned with it. There is almost always a connection between prosperity and having a clear sense of purpose or even calling. Don't follow your bliss, but keep it in sight.

Payoffs.

Speaking of prosperity, along the way, you begin to notice opportunities that appear. What might people pay you to do--gladly and even generously? What could you be one of the best in town at? And what does great compensation look like for you?

Each circle is crucial, interdependent and, by itself, not enough.

As we explore and attend to each one in the moves we make, the compass works and our sense of fit begins to resonate: Satisfaction, contribution, service, and prosperity. As with following any compass, where you start is

not where you'll land and course corrections are continuous: Your intuition gets restless; you stop and check and maybe backtrack or sprint or stop to savor a spectacular vista.

I work with leaders and coaches who ready to check their heading. Usually they're restless. Maybe they are paid well to do something that they're not getting better at or enjoying very much. Maybe they want to find a way to make a living at what does give them a sense of satisfaction and contribution. Maybe they are ready to cultivate an area of potential mastery with which they've only experimented (but for which they've usually been thanked).

As you check your heading (or, if you prefer, your signal strength), start with your most personally compelling “circle.”

Circle #1: Proficiencies

Again, the top circle represents the work that you know you do well. After a decade or so of work, most of us are starting to think about what we want more of and less of. As you think through the abilities, assets, education, experience, personal traits and gifts that belong to you, some will inspire you more than others. Pay attention to stories you love to tell about how you've gotten to know what you know. How'd you do that?

Circle #2: Purpose

The lower-left circle represents what you feel strongly about, or why you work so hard. Maybe your attention turns to where you've always had a sense of special satisfaction or contribution in your work or because of your work. You provide an income and an example that matters. You do the work and you don't cheat. If you have a sense of spirituality about your time on the planet, maybe that comes to your attention. *What are the compliments that mean the most to you? Who do they come from?*

Circle #3: Payoffs

The final circle speaks to what spells freedom to you: A number probably comes to mind. Write it down. But also ask yourself, “What would people pay me to do?” And “Once the money is ok, how else do I like to be compensated?” It's probably about being able to have choices and autonomy and the ability to explore and produce: Maybe you like a strong team with an affirming leader, or being your own boss, or traveling a lot, or not, or being acknowledged publicly for your craftsmanship, or making innovation practical, or being trusted with a flexible work schedule. Write down some very clear specifics. Notice answers that integrate your life and your work.

Daniel Goleman says in his book, *Focus* (2013), that the much-heralded 10,000 hours' rule is “*only half true. If you are a duffer at golf, say, and make the same mistakes every time you try a certain swing or putt, 10,000 hours of practicing that error will not improve your game. You'll still be a duffer, albeit an older one.*”

And I would add that if you like the work so much that in addition to the hours, you add focus, tolerance for failure, tweaking and the risk required to increase your limits, your true north begins to emerge.

Bonus Points: Your Personal 360

As you use these questions to listen to your life, you may want to bring in a few consultants—people who know you well and are committed to your growth, personally and professionally. Try asking them to talk with you about the following questions:

- *Where do you see me getting most focused and enthusiastic?*
- *What do you see as my main skills and areas of expertise?*
- *What do you think the world would gladly pay me—or thank me--to do more of?*
- *Or simply ask them to talk to you about a time when they saw you at your best.*

The area of greatest overlap will help you to evaluate your restlessness and your potential next steps, your obstacles, your opportunities--and your evolving True North.

The idea, of course, is for you to become increasingly clear about where the circles get most vivid and complementary—and to keep listening for the rest of your life.

[Click here](#) to listen to my three-minute audio file and blog post about building your Vocare Compass.

Your “One Coach’s Story”

“Only experience can make wisdom a visceral part of our lives by bridging the distance from head to heart. That’s why a storyteller is magic but a teller of facts is not. There is a reason why parables are the oldest form of teaching: They work.”

Gloria Steinem, Revolution from Within

Have You Noticed?

At SeattleCoach we keep asking you to mine your experiences and explore your life, even your sense of calling, and then to be able to talk about why you see yourself as a coach or coaching leader: *You know how . . . ? What makes you unique? How you like to work? Who you want to serve?*

And you should know that we have a tradition: Every time our larger SeattleCoach tribe comes together, someone tells their “One Coach’s Story.” The volunteer stands up and in about five minutes tells about their journey to this moment, and to this growing craft, in their life. This, of course, is practice for speaking to the rest of your personal and professional life.

We’re at a time in history when the price of data, facts and figures is falling—it’s available everywhere. What isn’t falling is our delight in listening to a compelling story—a story that may connect some dots, and along the way, teach, protect, inspire or delight us and our listeners. In an evolutionary way, we are all creators and consumers of stories.

And for a coaching leader, storytelling is an essential skill as we explain, truth-tell, persuade and encourage.

Writing Your Story

What do you know about the nature of a good story? Here’s the oldest of story lines: ***An ordinary person goes on a quest.*** And those ordinary people are usually vulnerable and flawed heroes (Odysseus, Precious Ramotswe, Frodo, Katniss Everdeen, Harry Potter, Ellen Ripley). When the great teacher Moses received his call to lead, he worried, *“O Lord, I’m not very good with words. I never have been, and I’m not now, even though you have spoken to me. I get tongue-tied, and my words get tangled.”*

Don’t you love a great story? We listen, we empathize and recognize and breathe in lessons. And maybe we wonder, *“Maybe I could go on a quest too.”*

As Usual, We Don’t Have a Formula for Writing Your Story

(but we do have a few questions for you):

- What personal experience moved you into this journey towards coaching leadership? *Restlessness? Wondering, “Is this it?!” A slow dawning? Getting older? A loss? Your sense of purpose + mortality?* What happened? Who believed in you?
- And then what happened? What did you do? What were your inquiries and experiments and what did you begin to notice? How did your direction come into focus as you moved through contemplation to

preparation to action? Do you remember the first time you identified yourself as a coach or coaching leader?

- Like most of us with a learner's mind, you probably had times when you felt like a vulnerable beginner. What happened when you allowed people to see that you were new at this?
- What did you do when it began to seem too hard, even impossible? When you encountered significant internal or external resistance and, like Moses, you just wanted to give up and "go back to Egypt?"
- And when you kept learning and kept going, how did you refine your core message? How did you continue to talk about your emerging craft and presence as a coaching leader? And to whom? And then whom? Was there a point of no return?
- What convictions and core truths began to become confirmed in your heart? Who began to notice? What hard data and research and science aligned with and fortified your message?
- And, as your message about the value of coaching has begun to connect with the people you increasingly want to influence and serve, what are you contemplating? What might you do next?

Since the beginning of coach training (*"Engaging Elevator Exchanges", Your DATA, Your Vocare Compass*) we've been asking you to identify the elements of your story and to test-drive them both with the members of this Cohort and with supportive colleagues who are following your coaching journey.

And soon we'll be asking you to author and present a longer version of your story, your ***"Next-Steps/Personal Vision and Version Presentation."***

In the years to come, as you keep re-telling and refining the story of your journey into coaching leadership, who knows? The next time the whole SeattleCoach tribe comes together, we may ask you to stand and deliver your ***"One Coach's Story."***

Key Skills and Behaviors: A Second Look

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.

A Visioning Exercise

In 1963 Reverend King did not say, "I have an idea."

There is power in a person who, in the best possible way, is in love with his or her own life.

As a part of our work together, we will experiment with a guided visualization. Think of this as a longer version of “metaview.” The goal of a good visioning exercise engages memory, imagination, physical awareness and values to get a glimpse of the future you think you might want to create for yourself.

This is not hypnosis. It’s not woo-woo. It’s simply an opportunity to bring all your ways of knowing, your awareness, your memory, your imagination and your intelligence into focus. Maybe your intuition will pick up a few tips. I won’t give you a script, because you’ll want to do this with your own style and voice. If you decide to develop your own visioning exercise, make sure it reflects your own practice, your own ways of resetting, of returning your focus to this present moment. If you think you can do that, these are things to consider:

1. Start by asking people what they’ve experienced and explored using guided visualization. Clarify that this isn’t hypnosis. You’re not going to suggest things to them.
2. Explain what’s going to happen. (*“This will take about twenty minutes. Put your stuff on the floor; you can keep your eyes open or not; sit so that your core is supporting you and you’re giving you lungs lots of room to do their work . . .”*) When you give clear direction to any exercise in coaching, people will trust you more and their ability to learn and engage will increase.
3. Invite people to think about engaging all their intelligence, their memory and imagination and sensations. Give them time to re-set.
4. Help your coachees to find, recognize and listen to their highest, truest voice.
5. Ask people to set their own visioning “horizon.” Most people will go forward in time, but some may find it useful to glance back at their history.
6. Help them to imagine a satisfying day “out there.” What’s going on? Ask questions that will help your coachee to connect with their hoped-for values and emotions. (*“What do you see on your calendar? Who’s thanking you? And for what? Were you thanking anyone? For what?”*)

At the close of the exercise, take a few minutes of quiet for people to write down impressions, keepers. Anything that felt deeply important or resonant.

Then invite some voluntary debriefing.

- *What emotions did you have as you looked into the future?*
- *What did you see? Who was around?*
- *What were the obstacles?*
- *Did anything about the exercise give you a sense of restlessness?*
- *What were you learning?*
- *What were you grateful for? And to whom?*
- *Who was thanking you? And for what specifically?*
- *Who were you thanking? And for what specifically?*

Following our own exercise, I will be curious about how your vision begins to inform your own coachable issues and your next steps as a coaching leader.

Reviewing the Arc of a Solid Coaching Session

At each phase, when your agreement is to coach (even as the manager for twenty minutes a week), “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)

And as the partnership collaborates, deepening the Three A’s, the dynamic between exploring and experimenting/finding the “I could’s” provides the rhythm to the process.

The Beginning: Setting the Stage for Deepening Trust and Exploration / The Five Questions

In the first minutes your job is to establish a partnership of trust and to explore and find the starting focus of the conversation--the agenda that is alive in the thinking of your coachee. Take a moment here to re-read the section about **Reset** in Part 1 of the Key Skills.

If you’re a hiker, think of this as the agreed-upon trailhead. The beginning “agenda” may come from several places:

- ☐ 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? What about the stage of change?
- ☐ Maybe the coachee has granted your wish and sent you a focus form or pre-work note.
- ☐ Maybe something big or new or distracting has just happened—or is coming up. Is there a need for a “clear the deck?” or to refresh the agenda?”

Along the way, and in your own way, ask your coachee some version the Five Questions (any order):

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)?*

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: Exploring, Deepening, Double-Clicking, Finding What's Possible and Desirable in the Thinking of Your Coachee

Through the course of your conversation, you'll continue to explore and refine and maybe double-back on some of those Five Questions. Always aim for mutual equality and transparency. You are fully connected to who the client is, how they learn and what they may have to teach you. You are focused and at ease, ready to be surprised, delighted, influenced.

- ☐ The purpose of exploration is to help your client 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 client's limiting beliefs and behaviors. Invite your client to use his or her own intuition as a tool to come back to himself or herself in deeper and deeper ways. *What do you want? What prevents you? Is there something that will shift?*
- ☐ Let the client 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 client get your "wow."
- ☐ Let your client work a little harder, go a little farther.
- ☐ Ask direct, evocative and open questions that reflect the client's style and thinking and strengths.
- ☐ Use generative silence to do some of the heavy lifting. Are you OK with not knowing? Help your client find deeper contact with the known and the unknown. Glance together at the past if that story serves the current conversation.
- ☐ Bookmark your client's "I could's" along the way. They will likely lead to useful accountabilities.

The Close: Finding Experiments / Aspirations / Next Steps

People love it when they leave a coaching conversation with a clear and achievable next step towards a goal they feel deeply about. It matters. 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 "I could's" that have come up in the conversation. *What are you taking away?*
- ☐ Explore potential experiments and next steps that fit the client's goals, style, pace and stage of change as well as his or her preferred methods of being accountable. *Who will know? Who will you talk with about this?*

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 client may decide to journal or pray or reflect between now and the next conversation.

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

First- and Second-Order Change

In Module I we talked about change and all its alleged synonyms in the English language—from compliance to transformation. We talked about how in the lives of each of us, there are times when we joyfully embrace change: It's our own choice and our own pace. And there are those other times when change crashes down upon us—times when we don't see it coming, or it just becomes unavoidable. Either way, we usually find ourselves in the wilderness.

What timber is to a logger, change is to us in our work as coaches. We must understand its ways, its risks, its value and how it behaves—and, as always, what the choices are. Even in the wilderness there are choices.

You already know how to listen at Level II and III, you already know how to build an alliance and to use your own grace and wisdom in being compassionately curious. You already know how to listen for what's possible and desirable in the thinking of the person you're coaching given their stage of change.

Our work often applies to what is known as **“first-order change”**: That is, in the work of doing more—or less—of something we are already doing. First-order change may improve things significantly. And it's always reversible. This is the domain of “test and learn.”

For example, a manager is restless and knows he needs more challenge and development. He tells you, *“I like this company, but they don't see that I could add much more value from where I sit.”* You reflect back, *“It sounds like you'd be happy to stay if a few things shifted, like if you approached the company with some of your ideas—and they liked them!”*

So maybe as you and this manager work together, you explore and find the right experiments and there's a happy ending both for the manager and his company. A lot of coaching happens with first-order change:

- Adjustments to what is already mostly in place.
- New learning happens at a measured pace.
- The story is new, but in a comfort-zone kind of way.

And then there is “Second-Order Change.”

Ivan Doig's wonderful novel, [Dancing at the Rascal Fair](#) tells the story of two young Scottish immigrants who come to Montana in the late 19th Century. Doig quotes from one of the many books written at that time with advice for potential European and British emigrants, *“Crawford's Transatlantic Emigrant's Guide.”* Here's an excerpt:

“Do not emigrate in a fever but consider the question in each and every aspect. The Mother country must be left behind. The family ties. All old associations broken. Be sure that you look at the dark side of the picture: The broad Atlantic, the dusty ride, the great west of America, the scorching sun, the cold winter—coldest ever you experienced. And the hard work of the homestead. But if you finally, with your eyes open decide to emigrate, do it nobly. Do it with no divided heart . . .

“We find from our experience that the mid-point of the journey is its lowest mark mentally speaking. If doubt should afflict you thereabout, remonstrate with yourself that of the halves of your great voyage, the emigration part has been passed through. The immigration portion has now begun.”

Second-order change is deciding, or being forced to decide, to do something fundamentally different from what you've done before in your life. And like the decision of these young Scots to emigrate, the change is irreversible. Once you've begun, it's not possible to ever return to the way things were. And the dimensions of the change can be emotionally overwhelming: Changes in finances, in the expectations and judgments of others, even in your sense of yourself.

Second order change is disruptive and potentially innovative. Maybe your calculated risk will fundamentally change a process or a market—or you, changing the rules while everyone else continues to march in a traditional direction. How will you even begin to think about this? First to yourself, then to allies, then to the world?

Usually, one of your own second-order-change stories comes to mind here. What did that chapter of your life require of you? How did the stages of change apply?

These are some of the brave people I've coached who come to mind:

- The long-time incumbent who lost his election.
- The guy who was tapped to become the new director of his own team.
- The coachee who got sober.
- The woman whose husband became a quadriplegic in a skiing accident.
- The Roman Catholic priest who thoughtfully concluded that his path was to become a husband and father. (No, he hadn't yet met the woman who would be his wife. He just knew.)
- The woman who decided at thirty-five to come out.
- The coachee who was about to get married.

If you'd have been the coach for any of these great people, can you imagine how you'd have helped him or her to “pull apart” the complexity of their change? Each one knew at some level that they were moving into a wilderness and that “going back” wasn't an option.

When you're coaching **second-order change**:

- New ways of seeing possibilities in life are beginning to emerge.
- As a safe presence, you may be the first to hear the news. (You'll be on sacred ground.)
- The person you're coaching is going through a fundamental transformation. There are scores of dimensions and implications.
- There will almost certainly be a period of wilderness for the coaching partnership to move through together. You will ask lots of questions to which you don't yet have an answer.

When you are coaching second-order change, you spend significant time in emotional rehearsal, helping your coachee to “try on” what they will say and how they will talk about the change. And to whom. And when.

Whether the person you're coaching is addressing improved performance or considering a game-changer, as a serious coach, you're working closely with the inner process of a sacred human life.

Read more about it . . .

- Bateson, Gregory. [Mind and Nature: A Necessary Unity](#). 1979.

- Bergquist, William. [The Postmodern Organization: Mastering the Art of Irreversible Change](#). 1993.
- Bridges, William. [Transitions: Making Sense of Life's Changes](#). 2004.

Coaching Ethics Continued: Three Questions and Seven Strategies for Building Solid Alliances and a Great Reputation

This quote bears repeating from our Module I look at Ethics:

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

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

In successful human societies, before there are contracts, there are covenants that bring people together in bonds of loyalty and trust. A covenant is about belonging and collective responsibility. In a contract, people come together to exchange that which is of benefit to each.

Professional coaching ethics grow out of covenantal convictions. As coaches we aspire to serve and grow and even to experience discomfort in order to accomplish excellence. We love it when, through our own example and behavior, we inspire connection and trust and nobility and gratitude. And we know that when we and our coachees become safe-enough, it becomes possible to make money, have fun and do good all at the same time.

Coaches get into trouble when they don't act like professionals. When their agreement is to coach and they consistently spend the agreed upon time doing something else. And when then don't practice genuine kindness. Broken relationships, bad reputations and on rare occasions, well-deserved lawsuits emerge from disrespecting personal information and the power of the coaching relationship.

Ethical contracts that are built on covenants between good people are of course reflected in your behavior and agreements. As a coach, you will face complexity as you walk with people into the challenges they face.

Navigating your work takes a continuous awareness of three questions:

1. *What reflect the covenantal convictions of your life? What are the values you hold as a decent member of our society about what is true, right and good?*
2. *What are the ethical and contractual expectations of a professional coach?*
3. *And what are the legal and contractual requirements of your personal and professional behavior in this state and country? [Here's an interesting case study.](#)*

Whether you are an entrepreneur or a manager, assuming you've become familiar with the ICF's [Code of Ethics](#), the following are seven guidelines will help you to navigate the three questions:

1. Practice kindness and fairness in all your dealings. As a coach you're in honorable relationships with many people and the goodwill and affection you share will often last for many years.
2. Practice truth in advertising: Stay within your scope of practice; under-promise and over-deliver (vs. the reverse). Be careful about allowing your opinions and convictions to become cleverly disguised as areas of professional expertise—for example: finances, taxes, nutrition, sleep, exercise programs. If you're not an expert but have a hunch, explore the options with your coachee. Their judgments and conclusions are the most important. Be able to demonstrate that you're working within your realm of competence

(professionally and emotionally). And as you keep growing, document your knowledge, continued development, skills, care, consultations and thinking process. Be able to demonstrate that you're doing professional work. Your credential is a promise to stay current in your professional development. Be better than you need to be.

3. Make continuously certain that if your agreement is to coach, you coach (vs. consult, teach, tell, fix, coax, rescue, drill, prop up or nag). If your work includes consulting, see what coaching can accomplish before, during and following your workshops and presentations. Have clear agreements about responsibilities, results, confidentiality, roles, boundaries, money and expectations.
4. Write good notes and keep them secure.
5. Create clarity about the financial parts of your agreements. Will you bill for outcomes? By the hour? How will your billing and accounting look? Monthly? On a retainer? As a project? Tuition? Proceed with caution where you sense a potential conflict of interest or dual relationship. Ask yourself, "What could possibly go wrong?" When you want to connect a coachee to someone else in your network, leave contact up to the coachee and if he or she wants you to talk with someone, get written and specific consent first.
6. Personal stuff: Stay aware of your personal needs and aspirations and get them met elsewhere (i.e. in your own coaching, with colleagues, at home, with friends). Be social only if both you and your coachee believe the coaching will not be impaired—discuss boundaries, objectivity. Hang onto your professional identity and presence.
7. Confidentiality in your agreements and in your behavior: Develop clear agreements about this, knowing they can get complex when you're working with organizations and sponsors (I've listed a couple of great resources below). Get consent in writing for anything you record that you want to use in your professional development (ICF applications, mentor coaching, supervision).
8. Have a "professional will" (in case you get hit by a bus).
9. Use regular consultation with your mentor coaches and colleagues to continue to grow.

**Bottom Lines: Respect. Be clear. Be kind. Consult. Grow. Listen.
And don't blow through your intuitive flashing yellow lights.**

Read more about it . . .

[Flawless Consulting: A Guide to Getting Your Expertise Used](#). Peter Block. 2011.

[Coaching in Organizations](#). Linda J. Miller MCC and Madeleine Homan Blanchard MCC. 2013.

[ICF's Ethics FAQs](#)

Hacking the Core Competencies

In *Module I* and in *Coaching for Leaders*, we ask new coaches to focus on the Key Skills and Behaviors and stages of coaching human change. And we use the Play Card (*The 3 A's and the Core Four*) set the stage for trust and to begin to find the balance and rhythm of between exploration and action.

And now, as you continue to develop your balance and rhythm as a coach, we want you to understand and make personal the Core Competencies of the International Coach Federation (ICF): the industry standard for our work. As we explore each one, you will find yourself “connecting the dots” between them and everything we’ve explored together thus far.

When you are ready to apply for certification, your grasp of the following competencies will be assessed at the ACC level via a multiple choice “coach knowledge assessment” (155 questions), and via a recording of a session (of at least twenty minutes) along with a transcript of that session.

Coaching becomes nearly magical when, instead of driving to solution and performance, we trust the insight and creativity of the people we’re coaching--and when we stay open to learning with them. We are always more effective when we see them as bearers of gifts for us. These Competencies will help you to foster the magic.

In the early days of SeattleCoach, I designed this document, “Hacking the Core Competencies.” In those days, the ICF’s Core Competencies were big philosophical targets that, in my opinion, needed a little decoding in order for new coaches to grasp what they looked like behaviorally, in practice. Then, in early 2014, the ICF developed some behavioral “markers” and I happily edited this document. Then again, in 2019, the ICF revised and consolidated their Core Competencies, and we then did some of our own updating at SeattleCoach, with the goal of continuing to prepare SeattleCoaches to work solidly at the PCC level at the end of Module II (even if you haven’t yet completed the required number of coaching hours for this advanced certification).

Both now and with the revisions, think of the ICF’s Core Competencies in **four big categories**:

Foundation	Co-creating the Relationship	Communicating Effectively	Cultivating Learning and Growth
1. Demonstrates ethical practice 2. Embodies a coaching mindset	3. Establishes and maintains agreements 4. Cultivates trust and safety 5. Maintains presence	6. Listens actively 7. Evokes awareness	8. Facilitates client growth

I still keep my own personal learnings-log, noting what I believe each of these competencies looks like in my own life and work--as I hope you will. There is an editable copy of this document on the [Module II page](#). It’s designed for you to add your own insights and learnings.

- Everything in blue below is © ICF and describes the behaviors, the “markers” they listen for.
- Everything in red below is my take on things.
- And there’s room for your take on things too.

As you review the following Core Competencies, be thinking about how you see our **Key Skills** and ways of thinking about human change mapping to them. I'll include a couple of possibilities under each Competency. As you give each other feedback in our upcoming mentor coaching sessions, be as specific as you can. You will likely build on each other's comments as you work from these Core Competencies.

As we listen to each other coaching, remember:

- ***Our primary focus is on the coach, not the client.***
- ***The “markers” below are not a checklist, we use them to respond and customize to the agenda the coachee brings.***
- ***It's common for a coach's skill to speak to more than one Competency at the same time.***

A. Foundation

1. Demonstrates Ethical Practice

Definition: Understands and consistently applies coaching ethics and standards of coaching.

1. Demonstrates personal integrity and honesty in interactions with clients, sponsors and relevant stakeholders
2. Is sensitive to clients' identity, environment, experiences, values and beliefs
3. Uses language appropriate and respectful to clients, sponsors and relevant stakeholders
4. Abides by the ICF Code of Ethics and upholds the Core Values
5. Maintains confidentiality with client information per stakeholder agreements and pertinent laws
6. Maintains the distinctions between coaching, consulting, psychotherapy and other support professions
7. Refers clients to other support professionals, as appropriate

Patty's Summary: Remember this quote by GK Chesterton? ***“When you break the big laws, you do not get freedom, you do not even get anarchy. You get the small laws.”*** Your own core morality and integrity will make it easy to maintain your ethical clarity as a coach. Grow increasingly clear about the [ICF Code of Ethics](#). (And explore [these FAQs](#) before you take the Coach Knowledge Assessment.) Act like a coach. Respect confidentiality. Be able to explain distinctions when you need to (like the differences between consulting, psychotherapy, rescuing, managing, directing, giving legal or financial or relationship advice, nagging, etc.). This Competency is not evaluated in mentor coaching, but if you spend most of your time doing something other than pure coaching, it would be a disqualifier.

*If you are known for some subject matter expertise (and most great coaches are), you'll use that in your writing and speaking and in your web presence, and probably to inform key questions. When you do, you'll invite your coachees to evaluate what you offer. But if your agreement is to coach, that's what you do. Focus on inquiry and exploration, the present and future, rather than on telling, advising, assigning or acting alone to choose the focus or answers. Be clear when you know it's a match, ***“This is coachable and I think I can help.”*** And be clear when it's not. Refer when you need to. Consult with another coach when you need to. Keep confidences. Keep promises. Honor the big laws.*

Your comments and learnings:

2. Embodies a Coaching Mindset

Definition: Develops and maintains a mindset that is open, curious, flexible and client-centered.

1. Acknowledges that clients are responsible for their own choices
2. Engages in ongoing learning and development as a coach
3. Develops an ongoing reflective practice to enhance one's coaching
4. Remains aware of and open to the influence of context and culture on self and others
5. Uses awareness of self and one's intuition to benefit clients
6. Develops and maintains the ability to regulate one's emotions
7. Mentally and emotionally prepares for sessions
8. Seeks help from outside sources when necessary

Patty's Summary: *This Competency is foundational to your inner life as a great coach. When you came to coach training, we asked you to, “write a little about how you take time to reflect on your life and work. How do you course correct? Metabolize what you're learning.” How are you growing in your understanding of yourself? How do you pay attention to your own somatic intelligence and energy? To your beliefs, emotions, triggers, biases, body, posture, gestures, breath and voice? To your own sense of meaning and value? And as we've moved deeper into this training, we've talked about the power of your differentiated presence. This Competency is about your growth mindset, and your ability to self-regulate and to use yourself as you coach big change and work with big emotions. Will you allow your coachees to see the impact they have on you? It's also about knowing what you're responsible for and for knowing the strength of your influence even as you maintain respect for your coachee's autonomy.*

Your comments and learnings:

B. Co-Creating the Relationship

3. Establishes and Maintains Agreements

Definition: Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans and goals. Establishes agreements for the overall coaching engagement as well as those for each coaching session.

1. Explains what coaching is and is not and describes the process to the client and relevant stakeholders
2. Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders
3. Reaches agreement about the guidelines and specific parameters of the coaching relationship such as logistics, fees, scheduling, duration, termination, confidentiality and inclusion of others
4. Partners with the client and relevant stakeholders to establish an overall coaching plan and goals
5. Partners with the client to determine client-coach compatibility

6. Partners with the client to identify or reconfirm what they want to accomplish in the session
7. Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish in the session
8. Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement or individual session
9. Partners with the client to manage the time and focus of the session
10. Continues coaching in the direction of the client's desired outcome unless the client indicates otherwise
11. Partners with the client to end the coaching relationship in a way that honors the experience

Patty's Summary: *The coaching agreement includes both the big starting point and the session-to-session agreements along the way. Starting with the informational interview and throughout your coaching relationship, you stay curious about your coachee's evolving answers to the SeattleCoach "starting point" questions (as always, you'll ask several of these repeatedly): **What do you want to work on? What can you tell me about your vision for what might be next for you? What are the personal strengths you might bring to our work? If we become successful and six to twelve months from now, you're sitting there smiling at me, feeling proud, what evidence of success would you see? What would be different? Why does it matter to you? Who else is in your thinking as we work together?** Explain how you like to work, your terms. Explore, establish, check and revisit along the way. What's ambiguous? You are regularly curious about your coachee's progress both overall, and in each conversation. **"What are you taking away from our conversation?"** As you evaluate, you stay curious about how the **"agenda for today connects to the big question or aspiration you came to coaching with."** If it changes, you re-contract. Notice how many times the word "partner" appears here. This includes how you close sessions.*

Your comments and learnings:

4. Cultivates Trust and Safety

Definition: Partners with the client to create a safe, supportive environment that allows the client to share freely. Maintains a relationship of mutual respect and trust.

1. Seeks to understand the client within their context which may include their identity, environment, experiences, values and beliefs
2. Demonstrates respect for the client's identity, perceptions, style and language and adapts one's coaching to the client
3. Acknowledges and respects the client's unique talents, insights and work in the coaching process
4. Shows support, empathy and concern for the client
5. Acknowledges and supports the client's expression of feelings, perceptions, concerns, beliefs and suggestions

6. Demonstrates openness and transparency as a way to display vulnerability and build trust with the client

Patty's Summary: *This one is about signal strength and about the creation and cultivation of the safety, integrity, honesty and trust required for greater awareness and deep learning. Safety fosters increasing coachability. A great coach is a little bit pastoral, providing both compassionate support and respectful challenge for their coachee's genuine welfare. A strong alliance is a place of expression and experimentation with strengths, assets, new behaviors and risks. You work from not-knowing and share your observations without attachment to being right about them. Or diagnosing. In addition, you ask permission to explore sensitive or new areas ("I have a hunch. Would you like to hear it?"). The focus is on the coachee's language and pace and view of the situation more than on your own. You follow your coachee and check on both pace and process: Is it time to tap the brakes? Or to press down on the accelerator? There is mutual equality and vulnerability. Your coachee is a full and complete partner and the ultimate decider of what's important. You are at ease and NOT more interested in your own views, tools, performance or demonstration of knowledge. What is the coachee taking away from the conversation? With trust and intimacy, value almost always happens.*

Your comments and learnings:

5. Maintains Presence

Definition: Is fully conscious and present with the client, employing a style that is open, flexible, grounded and confident.

1. Remains focused, observant, empathetic and responsive to the client
2. Demonstrates curiosity during the coaching process
3. Manages one's emotions to stay present with the client
4. Demonstrates confidence in working with strong client emotions during the coaching process
5. Is comfortable working in a space of not knowing
6. Creates or allows space for silence, pause or reflection

Patty's Summary: *Here's a favorite quote, from Anne Lamott, about presence: "Lighthouses don't go running all over an island looking for boats to save; they just stand there shining." You allow your coachee to see your immediacy and transparency (which isn't the same thing as grabbing the spotlight to tell you own stories). You allow them to see their impact on you. You respond both to what your coachee wants to accomplish and to who he/she is and wants to be. Using his or her unique style and voice, you are curious, empathetic, encouraging your coachee's use of space and time to reflect. You occasionally use your own hunches and "intuitive hits"—inviting the coachee's evaluation, or asking them to "go down a layer." You understand that the more you use your own presence, the more coaching becomes a brave and light and energetic and improvisational dance. You stay aware of what you may want to teach the coachee (if you're*

aware, you can be wise with what to do vs. becoming an automatic advice-giver/fixer). You leave time for what you say to land. You are present, agile, intuitive, equal and at ease, not driving an agenda and willing to risk along with your coachee. You are open to what the coachee has to teach you and there is complete curiosity and customizing without the need to perform or be right. If we work from a solid sense of our own presence, we're usually contagious, and our coachee's personal presence gets more solid too.

Your comments and learnings:

C. Communicating Effectively

6. Listens Actively

Definition: Focuses on what the client is and is not saying to fully understand what is being communicated in the context of the client systems and to support client self-expression.

1. Considers the client's context, identity, environment, experiences, values and beliefs to enhance understanding of what the client is communicating
2. Reflects or summarizes what the client communicated to ensure clarity and understanding
3. Recognizes and inquires when there is more to what the client is communicating
4. Notices, acknowledges, and explores the client's emotions, energy shifts, non-verbal cues or other behaviors
5. Integrates the client's words, tone of voice and body language to determine the full meaning of what is being communicated
6. Notices trends in the client's behaviors and emotions across sessions to discern themes and patterns

Patty's Summary: *You listen with emotion and presence to your coachee's wholeness and agenda at all levels, to what matters to them (their agenda, vision, concerns, values, emphases, language and beliefs), and to what is and is not possible in their thinking--to both the logical and the emotional. You explore what the coachee feels deeply about, listening for underlying beliefs, values and incongruities. Level III listening is unfiltered by your need to demonstrate knowledge, tools and methods—or to be correct or to add content. You are curious along the way: What are limiting beliefs? Is the coachee getting what he/she really wants?*

And when you as a coach find yourself reacting with concern to something a coachee says (and this will absolutely happen regularly), you have choices:

- *You can notice it, take a breath and return your attention and curiosity to your coachee.*
- *Then maybe you'll find the place in your coachee's story where you can respond with your wisdom and experience and grace (see "Requesting / Challenging" in The Key Skills).*

Your questions and observations are customized and based on what you are hearing from the coachee in the moment and over time. Without an attachment to being right, you "connect the dots," integrating and deepening what you hear. You listen beyond the words to the coachee's

shifts in energy and emotion, to voice, breath, mood, posture. You don't rush the coachee, nor fill up the silence with stacked questions or interpretations. You don't finish the coachee's statements/ questions. You don't listen in order to teach or impose a story. You don't "Yes, and . . ." too quickly. You may also "call a time-out" and "bottom line" the coachee in order to explore the essence of what your coachee is saying. [This audio file](#) talks about the value of (and toleration of) silence.

Your comments and learnings:

7. Evokes Awareness

Definition: Facilitates client insight and learning by using tools and techniques such as powerful questioning, silence, metaphor or analogy.

1. Considers client experience when deciding what might be most useful
2. Challenges the client as a way to evoke awareness or insight
3. Asks questions about the client, such as their way of thinking, values, needs, wants and beliefs
4. Asks questions that help the client explore beyond current thinking
5. Invites the client to share more about their experience in the moment
6. Notices what is working to enhance client progress
7. Adjusts the coaching approach in response to the client's needs
8. Helps the client identify factors that influence current and future patterns of behavior, thinking or emotion
9. Invites the client to generate ideas about how they can move forward and what they are willing or able to do
10. Supports the client in reframing perspectives
11. Shares observations, insights and feelings, without attachment, that have the potential to create new learning for the client

Patty's Summary: *I love it when my brain lights up. And it's even better in a coaching conversation when my coachee's brain lights up with a core issue, a deepening vision or new learning.*

You help your coachee to find and hold the focus, to use both strengths and silence, to take the time and space to keep coming back to himself or herself in deeper and deeper ways.

You invite your coachee to create, express, share what they're learning and how they want to use that learning. You hold new thoughts or possibilities that emerge from the conversation, growing in your own awareness along the way. Continuing to listen beyond the words, you invite your coachee to explore how new awareness will connect to new aspirations—to next steps and broader applications in his or her life. The partnership makes it possible for the coachee to reflect on how new learning will be integrated into their behavior, their systems and their next steps.

Your comments and learnings:

Two Crucial Tools for Evoking Awareness

Powerful questioning *This one is at the heart of things. If all you needed to be a great coach was a list of standard or formulaic questions, an app would work. Evoking awareness is about asking simple, open-ended questions that are informed by the conversation, are not complicated, dressed up or stacked and are big enough to matter. Powerful questioning inspires your coachee to insight, to think more deeply, moving below the surface, or into a larger space with his or her concerns, hopes and desires. “**What do you notice about your breath, voice...? What part of you is not ok with this?**” Your questions are not standardized, leading, analytical, interrogating or all lined-up, but rather they are in response to what your coachee offers. Ask a question to which you don’t know the answer early on. Wait for it to land. Maybe ask it a second time. Let your coachee work a little harder. Let silence do some of the heavy lifting. And when you decide to ask “**why?**” make it what I call a “[forward-facing why](#)”. Our curiosity aims more at the future more than at explanations, justifications and regrets. The coach’s best “whys” are designed to help the coachee to further the use of something he or she has just learned. “**Why do you think your experiment worked so well with the team?**”*

Your comments and learnings:

Being graciously direct: *Even though our goal as coaches is to amplify the voices of our coachees, coaches are expected to bring their unique style and voice to the conversation in ways that serve the coachee’s awareness. Coaches tend to be big personalities! This might mean that occasionally, you as the coach, share your wise intuition and observations and then invite evaluation. When I was a tentative new coach, driving with my foot on the brake, my own mentor coach used to encourage me to “**go right in there!**” Coaches say what they see with clarity of language **without attachment to being right**, without endorsing, and without becoming the main voice in the room. You leave space for your coachee to explore, create and learn and you are clear about the purpose behind any exercises, assessments and requests. You are open to sharing your own experience and observations in the moment, directly and simply—without dressing things up. Maybe you say something that no one else in your coachee’s life has said or will say. Then, in return, you celebrate your coachee’s own directness, deeper engagement, metaphors, learning and intuition. As always, the partnership uses the coachee’s agenda, strengths, language, metaphors and underlying stories, thinking, learning style, and even limiting beliefs and critical voices to explore and to find the experiments. If you decide to interrupt, you have a good reason to.*

Your comments and learnings:

D. Cultivating Learning and Growth

8. Facilitates Client Growth

Definition: Partners with the client to transform learning and insight into action. Promotes client autonomy in the coaching process.

1. Works with the client to integrate new awareness, insight or learning into their worldview and behaviors
2. Partners with the client to design goals, actions and accountability measures that integrate and expand new learning
3. Acknowledges and supports client autonomy in the design of goals, actions and methods of accountability
4. Supports the client in identifying potential results or learning from identified action steps
5. Invites the client to consider how to move forward, including resources, support and potential barriers
6. Partners with the client to summarize learning and insight within or between sessions
7. Celebrates the client's progress and successes
8. Partners with the client to close the session

Patty's Summary:

*This one's about the gentle artistry required to deepen and further learning as your coachee moves forward both in the session and from the session. As the partnership evokes awareness and you have been curious about the stage of change, this Competency will help the partnership to implement new learning. Early on, you are clear with your coachee about the how you will behave as their coach regarding accountability. You ask things like, **"Do you need a plan? Who will you talk to about this? How does this move you in the right direction? OK if I ask you about this next time?"** Sometimes the best accountabilities/experiments get test-driven in the session: **"Are you doing it now?" "Want to rehearse?"** As a coach, you want to hear more "I-coulds" from your coachee (vs. "you-coulds" from you). Keep your eye on the stage of change that your coachee might be in. Is the next step congruent? Remember, the next step might be to contemplate (reflect, pray, get outside, journal, talk to their spouse)—or it might be to take a specific action (create, ship, learn and repeat). You don't choose the next step, but you may stand up for what your coachee says is important. Without assigning or endorsing, you keep holding the focus, tracking key experiments, shifts, evolving concerns, agreements, learnings, accountabilities and occasionally bookmarks for future conversations. You leave responsibility with your coachee to take action, both from session-to-session and over time. Notice the number of times you see the word "partners" above. And again, even in the closing of a session, there is strong partnering.*

Your comments and learnings:

Read more about it . . .

[The Former and Current Versions of the Core Competencies \(The new markers will be used in the Coach Knowledge Assessment and in assessing recordings starting in 2021\)](#)

[The ICF Code of Ethics](#)

[Ethics FAQs](#)

The Somatics of Coaching Presence

Somatic (from the early Greek, σωματικός) meaning 'of the body'. Think of somatics as relating to the body in all its wholeness and to its experience, conditioning and history. Literally, the body reflects the shape of our lives. And we have choices.

Presence is not only one of our Core Competencies our professional [Core Competencies](#) as coaches and coaching leaders, it is something that we actively model, inspire and foster in the lives of the people we coach. One of our bedrock beliefs as coaches is that with more trust comes more awareness and with more awareness comes more choice. And with more choice come new possibilities for where and how we'll go next in our lives. I think of awareness as having several interlocking "starting points." The last three are somatic:

1. In your beliefs and interpretations
2. In your words
3. In your breath and voice,
4. In your tone, mood and emotions,
5. In your non-verbals: Your posture/shape, facial expressions and gestures

With increasing awareness from any of those starting points, we can give better direction to what we do next.

In Module II, I ask coaches to be intentional about developing their leadership presence. If you are reading this, you are increasing your leadership and coaching presence in a way that is deeply congruent with who you are. As you grow in in your understanding, alignment and use of your own energy, your ability to listen well is growing too.

A somatic bottom line is that human brains learn best when they are safe enough. Not bubble-wrapped, but safe enough to reduce vigilance and to engage, trust, challenge and explore. As coaches, we learn to work with all kinds of temperaments, while building our own emotional authenticity, agility and resilience. The more you learn the elements of your somatic presence, the better you'll be at Level III conversations:

- Being a conversation partner who is safe enough to explore with. (And as coaches, we know that simply offering people more data doesn't light up their brains nearly as well.)
- Maintaining the good signal strength of a deep connection.
- Paying attention to all the ways the people we're working with communicate their most fundamental concerns, commitments, inspirations, fears, values and strengths.

As we've discussed, human beings have huge unconscious minds that process enormous amounts of information "in the background." We evolved to pay attention to our surroundings ("Can I eat that?" "Can it eat me?") and this helped us to survive and thrive.

Think about how to you enter a room. What message are you "leaking?" The other people in the room are scanning and making meaning of what just came through the door: *Is there low-level danger? Do I need to brace for something? Ah, I can relax and get curious! Or, Things are about to get exciting!*

In other words, you're contagious. Whether you're the boss, the coach or the person delivering coffee, you have the capacity to both set the tone in the room and to correct it. This is so big that I believe that the person in the room who is most aligned, congruent and transparent somatically and thus trustworthy is automatically the most influential (regardless of title). They change the energy in the room just by showing up.

The good news is that not only are you contagious, you have power to cultivate what's catching. Think about how much time you spend preparing presentations and slides—even the wording of your presentation. What if you had a way of preparing your somatic presence as well, of increasing the odds that you could show up as your best self?

As a coach you scan with some key questions in mind: *Is this person aligned? Is their message congruent? Is there integrity? Is he/she safe and confident enough to be coachable?*

As you review more details about each “starting point,” see if you can identify an experiment.

- **In Your Breath and Voice**

As coaches we listen more than we talk which, happily, gives us time to pay attention to the depth and efficiency of our breathing. Your diaphragm is the main muscle of communication. When it's not working well, we choke and get scared--and that's contagious.

Your voice is the vehicle for your thoughts—and it reveals your inner state and beliefs. And you can shape it. Our unconscious minds listen for pitch and quality, pace and undertones. And the unconscious mind of a group makes decisions about who its influencers are.

If you're like me you can identify hundreds of voices, but a few have had great impact on you. I began to pay attention to voice as a teenager listening to Rev. Martin Luther King and later to Ronald Reagan and Margaret Thatcher. In pivotal times in history, their voices were calm and strong, comforting and authoritative all at the same time. (Check out the link below for other examples.) I'm never going to get hired to say, *“You're in good hands with Allstate,”* but the good news of this first starting point is that anyone can increase the power of his or her voice and thus become a stronger leader and coaching presence.

Try this with your breath

Start by just noticing your breath. How far into your core does it go? Once you've noticed it, see if you can gently allow it to take up more space so that your ribcage or abdomen begin to move. You will likely find yourself sitting taller and maybe needing to stretch something.

Or try this with your voice

Find the pitch, tone and cadence at which your own voice feels strongest and most resonant. What can you do to bring your voice into that range? This might mean that you'll try speaking lower and slower. And what happens with your breath when you do that?

- **In Your Tone, Mood and Emotions**

Human emotion unconsciously helps us to make sense of what's happening. If I am nervous or self-conscious, what shows up to my coachee or audience is, *“There's danger in the room.”* This launches a vicious cycle between everyone's unconscious minds which accelerates the message of danger and

concern in the room. Your self-consciousness becomes their danger. The cool thing is that you can develop emotional focus for key moments. When you think about it, charisma isn't magic fairy dust sprinkled on a lucky few, it's simply emotional focus and behavioral congruence. And it just takes practice. As coaches, we know we must train ourselves to be present and to express the behaviors and emotions that fit the moment. That presence is contagious.

If you believe that you have some things that are uniquely yours to say and do in your brief time on the planet, your posture, voice, face and gestures begin to reflect it congruently. The reflexive state of an unfocused human brain is usually fear-based and scanning for trouble: *Will they like me? Will I make this time valuable? Will I lose my way?* Instead, we can literally give our brains other things to search for, *What's the opportunity? What are they hungry for? What gifts do I have for them? What else?*

Try this with one of your stories

Remember a time when you have been at your best with other people. You were confident, open, clear and gracious and very effective. Think about that experience long enough to remember what it was like for you mentally, emotionally, physically, viscerally, socially. You knew you were contagious in the best of ways and people were grateful.

Obviously, if you can break down some of the specific elements (*I knew that I was adding value, I'd prepared enough, eaten well, things were great with my spouse, I liked what I was wearing, it was mid-morning, I was standing, I'd worked out that morning . . .*), you can think about building those elements into your development plan.

Once you've done that, notice how that memory shows up in your physical presence. Our beliefs influence how we walk into the world (and vice versa). And we can choose them.

• In Your Non-Verbals: Your Posture/Shape, Facial Expressions and Gestures

The quality of your voice and breath and of your mood and emotion is obviously related to your posture, movement, face and gestures.

These things are so powerful that many transcend culture. Some even work for all primates. And we all know that posture, movements, face and gestures beat content when we are not aligned.

Try this with your posture

Whether you're seated or standing, gently move your posture into the one your grandmother probably taught you: At your full stature, shoulders relaxed and giving your lungs room, head balanced, face relaxed, arms uncrossed. This posture signals openness and trust--and trustworthiness.

Remember

You've spent hours in coach training developing your skills and how you will talk about your work. What would happen if you found deeper ways for your mind and mood, your body and behavior to be more aligned? Since

everything is interactive, start with the part of Somatic Presence that feels most interesting for you to experiment with and remember,

- Your presence will always beat your content when the two are not aligned,
- Greater awareness brings more choice and
- As a coach and leader, you are contagious--and you have power to cultivate what's catching.

My bottom line on somatic awareness: Pick a starting point that's interesting to you. Then test and learn, notice what is good and useful, connecting and life-giving. Repeat. As you think about these things, my brief audio file on the [Coaches' Hub Module II page](#), along with the resources below might be useful to you.

Read more about it . . .

[Amy Cuddy's TED Talk on "How Your Body Language Shapes Who You are"](#)

[A video overview of "Somatic Transformation" by Staci Haines at the Strozzi Institute \(8:29\)](#)

[As We Speak](#). Peter Meyers. 2012.

[Power Cues](#). Nick Morgan. 2014

[Presence-Based Coaching](#). Doug Silsbee. 2008.

Motivational Interviewing as a Way of Deepening Your Exploration

When people walk into their first conversations with us, they recognize our ability as coaches to form strong and safe relationships. That's the secret sauce that I look for when I'm interviewing prospective SeattleCoaches. It's what I've called "that thing that's hard to teach." It's the thing you recognized in yourself—and others probably did too—that made you think you could be a good coach.

Building on that foundation, we join with people who are deeply motivated about a desired future and our questions invite them to explore things like:

- What they hope to change, both long-term and "this week,"
- What's working: Their resources and bright spots and positive exceptions,
- Their language of strength and possibility as they begin to describe the future they want.

Motivational Interviewing (MI) is a way of engaging people who may be in pre-contemplation/contemplation while exploring both what they see as reality and possibility. It's a modality that you'll run into as a coach and my goal for addressing it in your development as a coach is to demystify it a bit—and to see these phases of thinking might even deepen your effectiveness in understanding how human brains change. You might find MI especially useful as you work on your pacing and on how you help people to explore the early stages of change.

Like all coaching skills, techniques like MI can be a bit like chess: You can learn "the moves" fairly quickly, but it takes a while to become masterful. As with all great coaching, when you study MI, you ask questions to which you don't know the answer. You need the coachee's expertise about themselves, their thoughts, emotions and experiences to make progress. As with all coaching, in MI:

The Prime Directive is: Collaboration with the coachee, respecting his or her interests, motivations and autonomy and

The Prime Attitude is: Compassionate curiosity

As you read on, see if you can imagine how these phases might deepen your ability to ask powerful questions—especially when people are moving through the initial Stages of Change (pre-contemplation and contemplation).

Four Key MI Phases of Exploration *(not that they are ever completely linear)*

As coaches, our focus keeps coming back to the specific hopes and goals our coachees have named—to their agenda. Even when people worry about their obstacles (often old beliefs and habits), their growing clarity about what they're hoping for is more powerful.

For example, **your coachee says, "I just had a health scare. I need to do something about my fitness--get healthy again."**

(And maybe they tell you what happened to make them contact you.)

As coaches, we don't ask, "Well, how did you get so out of shape!?" It's far more interesting and useful to direct our curiosity toward the future our coachee might be starting to imagine. This is a conversation about the coachee's aspirations, not about his or her compliance.

Phase 1: Coach connects and empathizes.

Focus on the coachee's goals and hopes. As always, stay collaborative and compassionately curious throughout the conversation. Remember, ambivalence is normal as people start to explore big change. Your coachee might be overwhelmed—both with their need to change and with the information they've been taking in.

Coach: *That's a lot.*

Coachee: *Yeah. Pretty unnerving. I'm only 48 years old.*

Using your coachee's language, direct your curiosity to what's working and desired.

What could it look like to "begin to get healthy again?" What else?

(Paradoxically), "What are the benefits of letting things stay the same?"

Start to find some beauty in the details you hear. Help your coachee to begin to connect with what they are most longing for.

Phase 2: Coach explores discrepancy and ambivalence.

The coachee's goals and hopes vs. how it compares to their present reality.

Coach: *I think I understand "why now." Can you tell me more about both sides of this thing?* (Listen, listen, listen: Let your coachee make his or her own case for (and against)—vs. following your temptation to fix, help, rescue, prop up, advise or make suggestions.)

Coach: *It's easy to get out of shape.*

Coachee: *Yep. I'm in a high-stress job and if I don't have down-time everyone suffers.*

Coach: *What concerns do you (your family, co-workers, etc.) have about where things stand? You're here today. How did you make that decision? What matters most today?*

Coach summarizes, gives feedback on the dilemma: *So, on one hand* (benefits of the status quo) . . .

And on the other (you just had a major wake-up call) . . .

Phase 3: Be open and curious with resistance.

Remember, the pros and cons are probably still competing.

Coach: *Have you had times in your life when you've been more fit? What made you decide to be healthy before?*

Coachee: *I was single and just out of college. It was easy. I just don't know when I'd fit in time to get to the gym, cook healthier meals, etc. etc. Plus, I like those quiet smoke breaks.*

At this stage, if you start arguing or telling or selling a solution, you'll hear "yeah-buts."

If you stay accepting and curious (*Sounds like you're doing the best you can do considering your need for down-time . . .*), the "yeah-buts" are more likely to come from your coachee.

Coachee: *I've just got to find something do-able.*

Coach: *Like what? What are the possibilities? What would you do first? Then what? Then what? What else?*

Phase 4: Support self-efficacy.

“I-coulds” will usually begin to come up. The coachee is in-charge of what’s important and what’s possible. What does their preferred future look like? What else? What else? They may bring up personal strengths, values, vision, ideas, stories from their past, upcoming events, support people.

Coach: *On a scale of 1 to 10, how important/desirable is making a change?*

Coachee: *(Laughing) My spouse says it’s a 10.*

Coach: *On a scale of 1 to 10, how confident are you that you could change this if you wanted to?*

Coachee: *About a 5.*

Coach: *What keeps it from being a 3?* (They’ll have to identify a starting point or an existing resource or advantage.)

Then just keep going with Level III listening and questions, like:

What’s worked in the past?

What would it look like now? What would you be doing?

Who’s in your corner?

How might you begin talking about this? And to whom? What would they say?

How would things be better for you if you started? (your family, work, how you feel, etc.)

If you look forward to, say, a year from now, what’s possible?

Some good ideas have come up as we’ve talked today—Can you see yourself experimenting with any of them?

I get that you really want to do this.

What could you see yourself doing about this? What would that look like? What else?

When would be a good time to start? Do you need a plan?

Leave enough room for your coachee to begin standing up for themselves even before you do. As always, practice being comfortable with silence. Let your coachee know you’ll wait. There may be some circling back along the way—but maybe the balance is tipping. Open-ended questions work best:

Closed questions

Do you like this situation?

Do you want to change your behavior?

Do you want to stay in your relationship?

Have you overcome similar obstacles?

Are there any reasons to change?

Open-ended questions

What do you like about your current situation?

What changes, if any, would you like to make?

What are the benefits of staying?

In the past, how have you overcome?

What are some main reasons you’d want to change?

Read more about it . . .

<http://www.stephenrollnick.com/>

<http://www.motivationalinterviewing.org/>

[Brief Coaching](#). Chris Iveson. 2012.

The Coaching Leader's Arena

The story of Mentor comes from Homer's *Odyssey*. Odysseus, King of Ithaca, is preparing to march off to fight in the Trojan War--and ultimately to a wandering ten-year, well, odyssey. Before he leaves, he asks a wise older man to oversee his household and to be a trusted advisor and protector to his young son, Telemachus, with a commission to, *"Teach him everything you know."* The wise older man's name? Mentor.

In the roughly 3000 years since, *Mentor* has joined our vocabulary, coming to mean something like, *A trusted advisor, friend, teacher and wise person who invests time, energy and affection in the growth of another.* And through the millennia, gurus, maestros, wizards, pastors, priests, guides, sages, counsellors, philosophers, shepherds, wise advisors, heroes, reverend mothers, saints, exemplars, pilgrims and Jedi Masters have joined the tradition. Like any profession, there have been both geniuses and charlatans, but the best of us have found ways to care, cure, support and challenge and to talk about what it all means. Through the millennia, the human appetite for secure engagement with what we're now calling "coaches" has stayed the same.

And now, in your own journey, you've become part of the story. Your hope is to use your wisdom and experience to inspire the development of others. Here's what I love about people like you who come to SeattleCoach:

1. You're already great at something else: You've spent years learning subject matter expertise, your SME. SeattleCoaches are executives, lawyers, surgeons, fitness experts, parents, pastors and faith leaders, consultants, HR business partners, marketing experts, CPAs, recruiters, therapists, realtors, teachers, business owners and adventure tour leaders.
2. And, though you may already saw yourself as a mentor and coach, you came to SeattleCoach to be a learner again.

Through our months together we've talked about "doing the craft and being the coach" and you've gotten good at this primary focus of a coach or a coaching leader: That "Northeast (NE) Quadrant."

The Coaching Leader's Arena: Four Quadrants and Two Realities

You know how a great driver in a great car shifts smoothly through the gears, hitting the right one for the right conditions at the right moment? That's how a great coach or coaching leader moves around the Coaching Leader's Arena: in brief conversations; in meetings with individuals, groups and teams; and in full coaching sessions that focus on the agenda or performance of their coachee or employee.

Based on my years of coaching and training smart people, here's how I've organized my thinking about the gears—the Coaching Leader's Arena, i.e., the world into which coaches and coaching leaders step every day. Take a moment to let your mind wander around the quadrants below.



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Most managers and leaders have a quadrant that is their "default" gear—for many, it's been that southwest quadrant. And while they continue to grow in their expertise and experience, giving direction and coping with complexity, they learn to ask questions that are big enough to matter. And then they learn to listen for the meaning and possibility that come back to them from the members of their teams. They usually hear deepening levels of intelligence and possibility and enthusiasm. Maybe their impulse to micromanage diminishes. One coaching leader observed, "People seem more confident when I coach them than they do when I mentor them."

But coaching leaders also have to consider the two realities that inform their progress.

The Surrounding Blue Circle: That's Your Presence

Coaching leadership presence is the foundational element to whatever "gear" you select. It includes your ability to be calm, confident, resilient and authentic. It boosts your ability to move thoughtfully and fluently around the Arena.

The more you become clear about what could be most useful in each moment for the individuals and teams you coach and lead, the more you open the possibility of leading from the powerful gear of that northeast corner, which, as your team matures, may become a new home base.

No matter your starting point, it takes a personal "pause button" in order to be deliberate about when and how to move into each quadrant. Every leader I work with has their own defaults to recognize, to use and grow from.

- Do you have a bias for action?

- Is your bias for reflection and contemplation?
- Is your bias more to challenge or do you just love to support?
- What is important to you? (Performance? Deliverables Business results? Employee development, satisfaction and retention?)
- How will you experiment with and even talk to your team about your forays into the northeast quadrant?

Here's what I've noticed about executives who get good at coaching: They learn to move around the quadrants as needed, without ever abandoning their coaching presence. This means that they understand how to bring their calm, clear coaching presence to recognizing:

- Moments when they need to advise and give direction
- When it's time to thoughtfully mentor
- To teach and inspire
- Or to get curious and explore, *"What does this coachee/employee know? What are they capable of?"* Maybe they didn't know they knew.

And, over time, they have an impact on both the present realities and the potential of the organizational culture within which they work.

The Surrounding Orange Circle: The Organization's Culture



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Organizations have their own defaults. Think of the surrounding circle as the system or culture within which the coaching is happening.

- What is important to your coachee's culture? (Performance? Deliverables? Employee development and satisfaction?)
- Which of the four quadrants is the leadership default of the coachee's culture?
- And if that organizational culture is paying you, how do you talk about the benefits of coaching?

In the words of Satya Nadella, Microsoft's transformative CEO, there are "know-it-all cultures" and there are "learn-it-all cultures." And both bring a compelling context. I'm old enough that the companies I choose to work with foster both coaching presence and time to learn the skills required of leaders who invite conversations in the northeast quadrant—even brief ones.

A few years ago, I was contacted by a big company in Silicon Valley. They'd heard about the work I was doing in the Northwest. "We've got twelve young new executives whom we're investing heavily in," they explained. "Could you fly down and spend the day with them? Tell them a little about coaching?"

"Sure!" I enthused. "I'll need a big, open room with windows, an executive sponsor who can join us for the day—and I'll send down a few ideas for them to start thinking about. The sponsor is important—I'll be inviting a lot of interaction and your young leaders need to know what the bosses are thinking about coaching leadership."

Maybe I should have been nervous when, three weeks later, I hadn't heard anything further—except for an email confirming the time and place. Then, the day before our meeting, my executive sponsor emailed to say that another commitment had come up for her. "You know, Patty, we bring in a new expert for these guys every month and they are always eager to listen. I really can't be there, but my assistant will help you find the room." Then I did get nervous. I found my way from the San Jose airport to the right building and the assistant met me and led me to a small, low-ceilinged, oblong, windowless room that was oriented to a big screen at one end. It was dark.

"Hey," I said, "I'd asked for a room with more light and some open space!"

"Sorry," said the assistant. "This was all that was available." And then she left.

Luckily, I did have a few slides, so I set them up. And then I walked my audience of earnest young executives with their devices out, ready for some serious notetaking.

Over the next three hours I did my best to introduce and illustrate some key concepts, but nothing I did seemed to bring interaction, evaluation, challenge, or even much curiosity. Even though I'd asked them to put away their devices, they stayed intent on taking notes.

We wrapped up, everyone thanked me and filed out. I called for my ride back to the airport. Then I sat on the curb in front of the building waiting and blaming myself. That insulting little heckler that lives in most of our heads got busy. I'd brought my calm authoritative presence and some good content. What had gone wrong? In retrospect, I think I'd encountered a culture that was mostly operating, at least at that time, in the southwest quadrant. It was a "know-it-all" culture and was developing its emerging leaders accordingly. Maybe I'd influenced them a little, but the missing experience with an executive sponsor who had some fluency with the Coaching Leader's Arena likely influenced them a lot.

In the years since, when SeattleCoach builds a partnership with a company, it's not simply to do trainings. Rather, it's to come alongside visionary leaders who are building cultures that understand the ROI of fluency around the Coaching Leader's Arena.

A Few Common Scenarios

Assuming you are calmly operating from your leadership presence and that, if an organizational culture is part of the picture, it's supportive. Which gear (or combination of gears) would you use in the following scenarios?

1. *There's a deadline looming and your most resourceful team members ask for some clear direction from you. It's part of your job.*
2. *You've just promoted a talented young leader and part of her job will be to do more presenting and facilitating with customers. She worries, "I haven't done much of that. But I want to—I really want to get better."*
3. *A colleague asks, "Would you be available to come teach a workshop about [your SME]?" And you develop some great content. You also build in time and permission for your participants to interact on and evaluate what you present as they figure out how to apply their learning.*
4. *Someone asks if you've ever navigated something like the tough thing they're facing and, though you don't talk about yourself much, you decide that it might be in their interest to share part of your own story with them.*
5. *Your employee asks for your advice but you have a hunch that he knows more than he thinks he does about what to do next.*
6. *Your colleague arrives from an emotionally intense day and can't remember what he wanted to talk about with you.*
7. *At the end of an informational interview, your new coachee is curious about the structure and process of her new relationship with you and asks, "Now, how will this work?" And you give clear direction and recommendations for what will happen next, probably referencing how you like to work. I say things like, "I'll send you an agreement later today, along with a payment link. And before you leave, let's schedule our first couple of sessions. I've noticed through the years that people are happiest with their outcomes when we work together for about ten hours over the course of a quarter."*
8. *Your coachee's confidence is wavering. She wonders how she can be coachable today in the face of an enormous challenge.*
9. *You are a manager who wants to lead more with coaching. Your default has been the Southwest Quadrant. Is it possible for you to have one-on-ones during which you occupy the NE Quadrant? How would you help your employees and your organizational system to understand what you're doing?*

A professional coach understands the discipline and rigor of operating from the NE Quadrant as a home base. We each have our own defaults to use and modify.

Can you move with purpose around the quadrants—without ever abandoning your coaching presence?

A great coach always has some SME, and coaching doesn't mean you're always hiding the ball. As one who understands how to navigate "The Coaching Leader's Arena" the challenge for you here, as we move into mentor coaching, is to practice the discipline of returning to the Northeast quadrant even as you move fluently and as needed around the Arena.

Two questions for you as you consider the Arena:

- 1. Which quadrant (or gear) was the “default” you mostly operated from before joining this SeattleCoach Cohort? The one to which you have reflexively gone?*
 - 2. What has made it possible for you to consistently begin to inhabit, or to start conversations in, the NE quadrant?*
-

Read more about it . . .

[Situational Leadership](#). Paul Hersey. 2019 edition. An early, related and enduring model from the days before coaching became a “thing.”

Preparing for Group Mentor Coaching

In any profession, there is a difference between practicing and training, i.e. between acquiring required skills and pushing yourself, armed with those skills into live situations. Under the pressure of training, you may not be perfect, but if you've practiced solidly, you'll still do well as you continue to hone and refine your coaching skills and presence. In our upcoming "live-action" group Mentor Coaching sessions, you'll have an opportunity to take the pressure of the spotlight.

The ICF 411:

The mentor-coaching requirement for the ACC credential is 10 hours of work with a qualified mentor coach. For purposes of credentialing, mentor coaching means coaching an applicant on their coaching skills rather than coaching on practice building, life balance, or other topics unrelated to the development of an applicant's coaching skills."

Seven of those ten hours may be done in a group setting (with ten or fewer members). Those seven hours are built into Module II. In addition to our seven hours together, you'll need three more individual hours before applying for your credential. There will be a separate place on your ACC application to document these hours and dates, so along with the rest of your documentation for this application, you will want to keep track.

Setting the Stage

1. Mentor coaching, like all coaching, is a dynamic between reflecting, exploring and doing. As we move into mentor coaching, my request is that you take time to reflect on your understanding of yourself, your DATA, your Vocare stuff, your story, your temperament and your growth as a coach.
2. By now, you have also been personalizing your understanding and use of the ICF Core Competencies. We'll help you pay attention both to what feels easy and what feels challenging to you as you practice them.
3. When it's your turn to take the spotlight, you'll coach in live action for twenty minutes and then we will debrief together, giving you both feedback and encouragement.
4. As always:
 - It's a best practice to touch base with your coachee about their agenda prior to the session with, for example a focus form or check-in email or an agreement about improvising with a card from the coaching scenario deck.
 - Pay attention to your alliance, your "signal strength."
 - Keep the focus on your coachee's agenda and desired outcomes.
 - Let go of performing (along with telling, diagnosing, advising, assigning, etc.).
 - Use all your intelligence (including your heart, somatics and intuition).

You may find it useful to listen again to [this coaching session](#). This long-established coachee brought a big agenda and a session I'll never forget (42:13).

The Process We'll Follow in Group Mentor Coaching

1. In the weeks prior to the beginning of our mentor coaching hours, we'll ask everyone to sign up for one 20-minute time slot. Between now and then, keep reviewing, especially "Hacking the Core Competencies" and touch base with your coachee about his or her agenda. Some possibilities:
 - a. You can either arrange in advance to coach your partner from the week prior to your turn or, if your partner is a good actor,
 - b. They can draw a card from the coaching-scenario deck and use it improvisationally, or
 - c. You and your partner can plan to enact the agenda of one of your current coachees.

In addition, please ask your coachee to sign a "permission to record" form for you (below). [There's a sample on this page of the Coaches' Hub.](#)

This will be a full twenty-minute coaching session with a beginning, a middle and a close/next step, followed by a debriefing.

2. As you begin your twenty minutes of coaching (you're in charge of the clock), we'll ask you to talk to us for a few minutes:
 - a. If you've got a tangible metaphor: A piece of art, a poem, or a coachy theme song to play for us, please bring it. We'll listen and appreciate it with you and ask you about the significance of your metaphor. If it's a song, we'll then add it to the [Coaches' Play List](#).
 - b. We'll ask where in the Core Competencies you are feeling especially clear and comfortable and
 - c. Where in the Competencies you feel stretched, maybe even fuzzy and easily stuck.
 - d. And we'll ask, *is there is anything specific you would like to work on as you do your live-action coaching?*
 - e. And we will ask your Cohort (now that they know you well) if there is anything they'd like to see you work on.
 - f. This will also be time to soak up our support for you!
3. Your mentor coaches and colleagues will be using the ICF Core Competencies (below) as they listen. And our feedback will be related to Competencies #2-11. Competency #1 isn't usually evaluated during mentor coaching but you'll need to understand it well when you take the **Coach Knowledge Assessment**.

During these hours of mentor coaching, we ask everyone to keep their personal written notes as they build their own version of "Hacking the Core Competencies."

4. Once during your twenty minutes, you have to option to take a brief time-out at a moment of your choosing. This might be when you're stuck or at a crossroad. During the time-out, you have one minute to explain the purpose of the time out and to brainstorm with your peers about what they're seeing--and how they see your options.
5. Following your twenty minutes of live-action coaching, we will debrief together as a Cohort for fifteen minutes:
 - a. First, we'll take a couple of quiet minutes for everyone to record impressions and observations.

- b. Then we'll ask your coachee to talk briefly about what he or she experienced and noticed in your coaching.
- c. Then we'll ask you, the coach in the spotlight, to talk about your experience.
- d. And then we'll turn to your colleagues (each one has been referring to a copy of the Core Competencies) and hear their feedback.
- e. Then your faculty will have a few minutes of feedback and questions for you. We may ask you to go back to a specific moment in your session, not to correct anything, but simply to try something different.
- f. We'll send you written individual written notes within a day or two of your session.

Note: Down the road . . .

Before you can apply for your initial credential with the ICF, you will need three additional hours of *Individual Mentor Coaching* with a PCC, an MCC or with an ACC who has held their credential for at least three years. Your Module II certificate will reflect that, assuming you were present, you completed seven of the ten required mentor-coaching hours in a group setting.

In addition, you will need to include with your application, a recording and transcript of one of your best coaching sessions (a minimum of twenty minutes).

Working at Level III with Your Colleagues in Group Supervision and Mentor Coaching

"I'm always ready to learn. I'm not always ready to be taught." Winston Churchill

"Good conflict is the pursuit of the best idea." Patrick Lencioni

Remember? At the beginning of Module I and then again a few weeks ago, we talked about feedback.

We predicted that you would experience a little healing as you experienced feedback that comes from people you trust and that respects the glide-to-challenge/resistance ratio. We asked you to extend grace to your partners—and we predicted that they would become your trusted allies.

Now, you recognize that feedback can become life-giving when you're working at Level III, when you've built trust over time, when you know that each member shares your desire to become a great coach and when you keep that ratio in mind. Even if it what you hear is a hard truth, if it is offered in an environment of trust and civility, it can still be life-giving.

At SeattleCoach, we know that "being real" never sounds harsh or aggrieved.

As we move into group mentor coaching each member of this Cohort has made significant deposits into "bank accounts" of trust.

By way of review, these are SeattleCoach hallmarks of practicing generative feedback:

1. You speak from calm authority, using yourself and being open to learning and being influenced.
2. You speak as closely as possible to the "event" or observation.
3. And with curiosity and specifics. You speak to what is changeable and growing.
4. Over time, your feedback and the relationship that fuels it focuses on strength, values and accomplishment more than on failure and rough patches.
5. You stay mindful that they long to be great coaches and their version of "excellent" will be a little bit idiosyncratic.
6. And, of course, you speak with respect and, unless the house is on fire, you are unhurried.

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.

[Click here](#) to learn more about post-Module II Mentor Coaching

[Click here](#) to learn more about post-Module II group Supervision Cohorts



The SeattleCoach Training & Development Program

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Permission to Record a Coaching Session

The purpose of this release is to facilitate the development and credentialing of:

(Name of coach)

I, _____, authorize _____
(Name of coachee) (Name of coach)

to record this coaching session on _____.
(Date)

I understand that this audio recording of my coaching session will be reviewed only by:

- ☐ This coach.
- ☐ A SeattleCoach Faculty Member.
- ☐ International Coach Federation assessors who will use it to examine the quality and methods of this coach and/or this training program.
- ☐ As a coachee you understand that your full name will not be used in this recording and that your information will be kept confidential and will not be shared with any other party.
- ☐ Check this box if you as the coachee would like to have a copy of the recording.

I have read and reviewed this and I understand its content.



Coachee's Signature _____ Date _____

Coach's Signature _____ Date _____

Your Observations in Group Mentor Coaching

Foundation

1. Demonstrates ethical practice. (Not evaluated in mentor coaching, but if you spend most of your time doing something other than coaching, or if you violate the [ICF Code of Ethics](#), it's a disqualifier).

- ☐ 2. Embodies a coaching mindset

Co-Creating the Relationship

- ☐ 3. Establishes and maintains agreements

- ☐ 4. Cultivates trust and safety

- ☐ 5. Maintains presence

Communicating Effectively

- ☐ 6. Listens actively

- ☐ 7. Evokes awareness

Cultivating Learning and Growth

- ☐ 8. Facilitates client growth

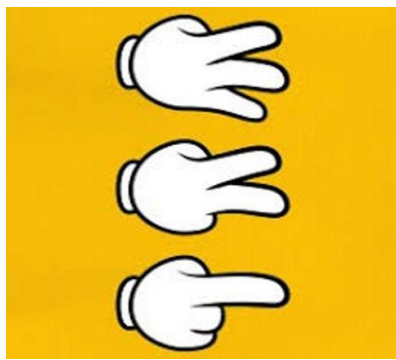
Revisiting the SeattleCoach “3-2-1 Rule”

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

Remember back at the beginning of Module I when we talked about the SeattleCoach “3-2-1 Rule?” Congratulations! You’re nearing the end of your first year!

As you begin to design your **Next-Steps/Personal Vision/Version Presentation** this is a good time to think how you will continue to build your professional identity: Your visibility, your trusted relationships and your profitability over the long haul.



Three years

Two Jobs

One day

As coaches, we are in the relationship business. Whether you’re working internally and want to grow your expertise, reputation and influence inside of a great organization, or you are envisioning your own entrepreneurial coaching business, the challenge is always to help people to accomplish their goals effectively and happily and at the right pace and timing.

No matter your temperament, cultural background or coaching specialty, your success in a free market rests on your ability to grow in some continuous and interacting areas of attention. It’s an iterative **growth spiral**. You pay steady attention to these three things for as long as you’re in business:

1. **Visibility:** Can you find ways of being accessible and responsive to the people you most want to serve? Starting with the people who already know you and trust you and will tell their friends about you?
2. **Relationships:** Can you build trust with those relationships via your reliability, professionalism and the confidence that comes from a strong ethical foundation? Are you listening for what your audience needs from you? Visibility and trust lead to
3. **Profitability:** Staying confidently transparent about how you’ll charge for your time and expertise. Do your fees work for the audience you want to serve? For your level of expertise? For your income goals?

I know. Wouldn’t it be nice if after all the work of completing coach training and of then earning your ICF credential, you just started getting requests from people who were desperate to work with you? There are nine

things I started doing a couple of decades ago in the cultivation of my own work. Maybe my list will help you—maybe think of it as a Wheel.

1. **About your launch:** Keep your day job while you feed your passion. Don't follow your bliss--but keep it in sight. If you load a bunch of financial pressure onto your young coaching practice you might smush it. Make sure your biggest fans and referrers (family, friends, colleagues, strategic alliances) know about this new element or chapter in your work so they can help you. They already want to be in your corner—you just need to help them know how to be. For me this involves email and web presence that educates people about what I do. It also involves lunches, walks, complimentary sample sessions, lunch-and-learns, Rotary presentations, auctions and hand-written thank you notes. Make people proud and grateful to know you. They'll jump onto your bandwagon. Then they'll tell their friends because you're going to make them look good. Also starting now, coach a lot. All comers. Get good at both "doing coaching" and "being the coach."
2. **About your niche and specialty:** Along the way, start to notice which clients/coachees you look forward to working with. Study their outcomes and concerns, their sector and their vocabulary. What do they want to work on/get better at? Then develop things to that will delight them. This must include stuff you find fun and interesting and compelling. Without that, the 10,000 hours rule won't make you a better professional, just an older one. If it's fun, you'll be more likely to create services, resources, workshops and groups that will delight these people (this is way more fun than "finding clients/coachees").
3. **About using your SME:** I know, I know. In coach training, your mentor coaches nagged you about not teaching, telling, advising, consulting, propping up and rescuing. But at SeattleCoach we've also encouraged you to mentally bookmark what you find yourself wanting to help your clients/coachees to understand and learn about. The stuff you want to teach might end up energizing your workshops and articles and web presence. After all, coaching is highly customized, highly personalized, just-in-time adult learning. A great coach usually has some SME, and coaching doesn't mean you have to continuously hide the ball. Maybe you'll develop and facilitate SME workshops, always remembering that learning becomes more sustainable when you offer coaching before, during and following a great presentation. As one who understands how to navigate "The Coaching Leader's Arena" the challenge for you is to practice the discipline of returning to the Northeast quadrant.
4. **About your visibility:** Make sure that your ideal clients/coachees see themselves and their concerns reflected in your stuff (including your web presence). Again, cultivate your Personal Way of staying visible. Do it Your Way or you won't do it. Be able to explain your work so that your grandmother would get it. Play that game we talked about in Module I and in the **Next-Steps/Personal Vision/Version Presentation** guidelines: *You've got eight minutes in front of 100 great people . . .* Your visibility means a lot of uncompensated time that may include writing, speaking, responding, demonstrating, serving, praying, pitching, creating, offering and preparing.
5. **About the market:** As you find your voice and create some visibility, your market will begin to talk to you. Are you listening? What are the needs? What would delight those people you'd love to serve? As I learned early from my entrepreneurial Father, it's a lot more fun and interesting to constantly create products that will delight your ideal clients than it is to simply work hard at finding people to buy your stuff. A recent Coaching Study commissioned by the ICF found that the average income of a credentialed coach was \$61,900. That's average. As we all know, the range is gigantic and the truth is that most of certified coaches who want to be entrepreneurial coaches don't ever make the income

they'd like to make. What's the old saying? *"If it was easy, everyone would do it."* Admittedly, I'm a bit of a free-enterprise geek.* In the words of the great football running back, Emmitt Smith, *"All men are created equal, some work harder in pre-season."* Change is a constant. Stay alert, flexible, innovative—even better, be the one who spots the need and addresses it. You are a servant-leader as well as a gifted coach. Take risks according to your intuition, the counsel of your mentor coaches and to your own good thinking. Be non-negotiable about the right things. Loyalty is earned and the best marketing promotion is to do really good work for a really long time. Word-of-mouth will begin to happen and you'll have more fun than those coaches who stay generic and wait for their phone to ring.

6. **About getting organized:** Put in place consistent work protocols, practices, processes, resources and technologies that will grow with you and your work. Be detail-oriented where it counts. Make sure your agreements reflect your interests and concerns. If you are a serious entrepreneur, in addition to working IN your business, plan on spend at least a half-day a week [working ON your business](#).
7. **About the money:** You first must believe that people receive value in their work with you. Once your conversations with yourself are clear about that, put a number on what you need and want to make. Revisit the number quarterly. Do whatever you need to do to never get resentful of your market. Get a second job if you need to. Stay ethically true in what you invite people to expect from you. Charge enough to be generous and be sure that what you charge makes sense to your market. Never forget that people have done their research before they contact you: Are you in the market zone? Competitive? Are your fees aligned with your level of training and experience? With your type of coaching? Make the basis of your competition quality and service instead of the lowest fee. Have some agreements with yourself about your carefully selected pro-bono work. Keep your overhead costs and debt low so your creativity and initiative are protected when you get scared. I know I'm a big optimist, but it can help your creativity to think through specific worst-case scenarios. Great coaches are solidly realistic: Big dreams, cash reserves, low overhead.
8. **About getting better:** Don't skimp where you lack experience and training. Pay for the best help you can find and keep learning and growing and being influenced. Build in budget and energy for the advantage of steadily improving your craft. Begin professional means that you keep growing, course-correcting and learning about the work you love.
9. **About your happiness and life balance:** Speaking of the 10,000 hours, you've got to do this in your own way or you won't do it. Stay mindful of the dynamic balance between effort and recovery in your life. Ethical coaches build lives that reflect their convictions as a coaching leader. This is true both at the starting line and for when you are a Jedi Master. Self-manage well, express gratitude every day. Know and cultivate your strengths and work with your flat sides. Be a good friend to yourself and make time for wise allies who will support and challenge you. There will be both celebrations and rejections.

Here's my bottom line for entrepreneurial coaches: This work is a get-rich-slow scheme. You have to do really good work for a really long time. In my experience, getting discovered is a marathon. Building a great practice and reputation isn't burglary. You don't break into it. It's a long, steady dance with the Growth Spiral of visibility, relationships and profitability.

*** Here's what I mean about free enterprise:**

1. Everyone can become an exemplary person with a compelling story and a service that the world needs.

2. In a free society with fair laws, good behavior is non-negotiable to the process (this is where your character and the quality of your colleagues matter).
 3. The marketplace is very discerning and competitive. The honorable people with the best stuff get discovered. And they never stop listening for how to refine their stuff and make it more widely available.
 4. Governments that have faith in at least half of all citizens practicing #1, #2 and #3 figure out how to limit the weight of taxes and regulations. And liberty grows.
-

Read more about it . . .

[The SeattleCoach Biz Dev Page.](#)

[The 2016 ICF Global Coaching Study](#)

[Seven Questions to Ask Yourself Before Going Freelance.](#) HBR.

[The 5 Fastest Proven Ways to Grow Your Coaching Business.](#) ICF.

If you're a mid-career entrepreneur:

Here's the good news: [Older Entrepreneurs Do It Better.](#) From the Wall Street Journal. 2018.

[The 100-Year Life: Living and Working in an Age of Longevity.](#) Lynda Gratton, Andrew Scott, et al. 2016.

[Range: Why Generalists Triumph in a Specialized World.](#) David Epstein, Will Damron, et al. 2019.

Your Next-Steps/Personal Vision and Version Presentation

Throughout our months of training and development, we have stayed curious about your emerging personal vision—and version--of being a great coach. We've asked you about how and where you like to work, about your D.A.T.A (desires, abilities, temperament and assets). We've asked you to explore your Vocare Compass and to write your "One Coach's Story." Maybe you've begun to notice where you'd like to specialize and what kinds of coachees you might like to serve, how they will find you and how you will establish agenda and measure your successes and who will be your principal coaching colleagues.

As you finish Module II, you are at the "end of the beginning," and it's a great time for continuing the personal review—a new snapshot of where things stand and what you see for your immediate future—in the words of one of our British SeattleCoaches, "how you will carry on from here." What could things look like for you six to eighteen months from now? What will it take for you to get there?

The purpose of your **Next-Steps/Personal Version Presentation** is for you to speak thoughtfully to our Cohort for about ten minutes about how you are making this work your own, how you're talking about it and about your specific plans for post-Module II. Think of this as a thoughtful personal review of where things stand for you here at the threshold of your next chapter.

Our big hope is for you to use this preparation and presentation to test-drive your message, your style and your plan for continued development and support. Feel free to use slides and handouts--many people do and, in many cases, the stuff they share with us becomes part of a website or workshop. At the same time, you don't have to. Just connect with who are firmly in your corner now and going forward.

Some ideas as you prepare . . .

I. Find and interview three veteran coaches who catch your eye

Look around the internet—or our own [SeattleCoach Network](#). Or review the [categories of coaching on the ICF website](#) (click on "agree" and start exploring categories and coaches). As you narrow your search, I ask that you find experienced (and successful) coaches who work in a way and with an audience you'd like to know more about. They can be local, or not, well-known, or not, probably with and ICF credential, but possibly not, internal to your company or an entrepreneur. These interviews will bring lots of creativity, but they will also grow your network!

See if you can get a fifteen-minute interview with one or more (at least one) as you prepare your presentation. Here are some sample questions other SeattleCoach have asked:

1. Where did your passion for coaching originate?
2. What is the meaning you see in your work?
3. For entrepreneurs: Who do you want to hire you? How do they find you? How do you determine your rates?
4. For internal coaching leaders: How have you build your brand and influence as a coach in your organization? What has support looked like?
5. How do you measure success?

6. What are some of the mistakes you've made along the way that would help me to know about?
How could you do it differently?
7. What are a few of your non-negotiable best practices?

Following your interviews, summarize a few take-aways that you believe will be helpful to you.

II. And then “interview” yourself: Where do things stand for you today?

As a member of this Cohort, you've spent most of a year taking in new ideas, testing-and-learning, sorting, customizing and curating. We've challenged you to experience yourself as a coach.

1. Where have you changed?
2. What are you proudest of in your development as a coach?
3. What are the things and who are the people that have especially influenced your practice?
4. What have you learned about your potential niche and specialty?
 - a. Regarding the people you want to serve: What are their challenges? What are they struggling with? What percentage of them will actually invest time and/or money in finding solutions or achieving specific outcomes? What is their vocabulary?
 - b. What is the extra “value-add” or personal interest or subject matter expertise that you want to bring to your coaching? (For example: Health and fitness, leaders and their teams, spiritual direction, career development, communication, managing disagreement, transitions, parenting, families with aging parents, . . .)
5. What are the key words we'll use to find you on the internet?
6. Currently, what are your biggest concerns? Obstacles to overcome?
7. How does coaching fit with your personal and financial goals? With the realities of the **SeattleCoach “3-2-1 Rule”**?

III. What is your brand at this point, and how will you create visibility for it?

Remember back in Module I, we challenged you to think about a scenario: *“Imagine you've got few minutes to speak to one hundred good people about your work as a coach. Let's say it's a very diverse audience (friends, their friends, acquaintances, strangers, backgrounds, races, cultures, politics, faiths, ages, genders and coachable issues). And let's say that, seated among the 100 are ten people you'd love to work with (and who are looking for you)—these ten would be fascinating, challenging, fun. And you know you could create a powerful partnership with each one. Also present are many more people who are attentive but have zero interest in your services (at least right now)—this is normal, your best can't possibly appeal to everyone. What will you say so that at the end of your eight minutes the ten people will seek you out?”*

What is the core of your message right now? Of your brand? In your **Next-Steps/Personal Vision and Version Presentation** tell us about it in a way that's congruent with your energy. Maybe what you say to us will be the message you repeat and build on in your writing, speaking and web presence.

1. How you will use your subject-matter expertise as an “engine?”
2. What are the gaps you see in the market? Or in your company?
3. What are the workshops that need to be developed? Coaches who are happiest as coaching leaders and most financially successful as external coaches, use any SME they possess (and love) in their web presence, in the public stories they tell, in their writing and in seminars. Though they do have hourly rates, they also have workshop packages that, in addition to preparation and presenting,

include budget for coaching before, during and following time with groups and teams. This is way more fun than just parachuting in for a keynote and hoping you've had some kind of lasting impact.

IV. “SeattleCoach is a professional development program that leaves a community is its wake”

How will you tap into the tribe of which you are now a key part? How will you create regular time for mutual support and learning as you continue to grow? Members of earlier Cohorts have:

1. Continued to meet together informally or for peer coaching, book clubs and meet-ups with other SeattleCoaches
2. Joined a [Supervision Cohort with Patty](#) for continued personal development, case consultation and professional support
3. Joined an [Advanced subject matter Cohort](#)
4. Worked with a SeattleCoach [mentor coaching group](#) which are designed to help you prepare for credentialing with the ICF
5. Come to SeattleCoach [Social hours and Summits](#)

V. What specifically will you do in the coming 3-6 months? Who will know?

As you design your presentation, create the learning, support and accountability that will be most meaningful to you--and most aligned with your emerging personal vision.

If you want to use a deck with your presentation, bring your laptop or send us your link ahead of time. As your colleagues, we will listen and appreciate at Level III.

- *Maybe give us the latest version of your ten-second elevator speech*
- *If there is something you'd like specific feedback on, tell us*
- *Tell us about your “take-aways” from those conversations with veteran coaches*
- *Practice something that you'll use again*
- *Improve your presenting skills--make your content “sticky”*
- *Set things up to get specific responses from us*
- *And tell us your plan for continuing to build into the lives of other coaches—and to invite them to build into your own. It's hard to be a great and ethical coach without a tribe (also, it's way less fun).*

Following your presentation of about ten minutes, we'll spend about ten minutes with you offering our statements of impact, appreciation and a few powerful questions.

Maybe we'll tell you how we've seen you change!

Calm down. This will be fun. And you'll get better. You know we've got your back, right?

Applying for Your Associate Certified Coach Credential

OK Coach.

Here's what you need to have before you can apply . . .

1. You'll need the signed certificates we've given you that total at least 60 hours of coach-specific training. Please keep track of these.
2. You'll need signed documentation of ten hours of mentor coaching over a minimum of three months. In Module II and with work as a CFL Triad Coach, your certificate documents seven hours of group mentor coaching. You need three more hours of individual mentor coaching. (See below for a link to some outstanding mentor coaches.)
3. You'll need at least 100 hours (or 200 half-hours . . .) of coaching experience with at least eight clients. You can start counting these hours from the first day of Coach Training. Seventy of these hours must be paid or done as a part of your employment. (See below: "Logging Hours for Your ICF Certification")
4. You'll need to complete an audio recording and transcript of a coaching session. (See below: "Preparing Your Recording for the ICF Performance Evaluation")
5. When you've got all of that assembled, [Click here](#) and then on "ACC ACSTH Path" to purchase the application (\$300).
6. Then, you fill out the application, push "send" and wait a month or two (it varies). The ICF will review your documentation. And they will have an assessor listen to your recording. This is a tedious wait.
7. And once the ICF has reviewed all of that and given you a thumbs-up, they will send you a link to take the Coach Knowledge Assessment (CKA). This is a multiple-choice exam (155 questions) that we think you are well-prepared to pass.
8. Then you'll receive a congratulatory message from the ICF. Then you'll let us know so we can make a big deal of it on our private Facebook group, and Patty will add "ACC" to your name on the SeattleCoach Network Page.

[This page](#) on the SeattleCoach website contains all of the links and resources you could possibly need. (But call us anyway if you get stuck) TTJT!



Welcome to the End of the Beginning!

*“Now this is not the end. It is not even the beginning of the end.
But it is, perhaps, the end of the beginning.”* Winston Churchill, 1942, after a long-awaited victory

You did it! For the last several months I’ve seen you shine in the things that matter most:

- In your integrity
- In your seriousness
- In your playfulness
- In your thoughtfulness
- In your uniqueness and
- In your relentless desire to get really good at the words and music of coaching

You’ve earned my deep respect and a part of my heart and it’s a privilege for me to know you, both as one of your mentor coaches and now, as your colleague. So now what? A few things:

1. In a final Module II email to you, I will attach a digital copy of your Module II certificate. As always, keep track of it—you’ll need it, along with your Module I certificate when you’re ready to apply to the ICF for the ACC or PCC Credential. And [click here](#) to review my latest effort at demystifying your path to ICF credentialing.
2. Remember, now that we’ve wrapped up Module II, any further peer-coaching hours you do will count as paid (bartered) hours.
3. As you approach your 100 hours, you’ll need three more hours of individual mentor coaching. We encourage you to complete those hours with a coach who holds either a PCC or and MCC. You can find some great the options at the bottom of [this page](#).
4. Look for my occasional updates to the whole SeattleCoach tribe. And check the [Coaches’ Hub Pages](#) often, along with our [SeattleCoach Network News](#) page. I’m always updating, improving and adding tools, books, etc.
5. Join us at [SeattleCoach social hours and Summits](#) (*“a reunion of people you can’t wait to meet!”*).
6. And [click here](#) to review our rich SeattleCoach book list on Amazon.

As always, in the months and years to come, call me or another [SeattleCoach faculty member](#) when you get stuck or thrilled, or just to check-in. I look forward to keeping you in my life as a friend and colleague.

My greatest hope for you as you continue to grow in your craft and presence is that you turn everything you know about coaching towards your own life: Ensuring that you are happy in your work, intentional about your circle of colleagues and finding your relationships with your family and friends to be your most enduring source of happiness.



To the journey then,

A handwritten signature in blue ink, which appears to read "Patty", is shown on a light blue background.

Appendix

Coaching Inside of Organizations

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](#)

In the coming decade, coaching will continue to mature both as profession for entrepreneurial coaches and as a central and crucial leadership capacity. To date, about half of SeattleCoaches have started external coaching practices, the other half have stayed in place, working inside of great companies as HR professionals and/or as better people managers and leaders with both their employees and their mentees.

And all of us are learning to figure out how to co-create alliances, agreements and agenda when the interests of a leader or a company are part of the work.

Visionary leaders today understand that the nature of work has changed. Their most talented employees are looking for two key elements:

1. Work that matters—a sense of purpose and service, and
2. Opportunities at work for personal and professional development

And if both elements are not present, those employees are more likely to change companies than they are to simply change jobs. And, as always, the determining factors are the company culture and its managers.

Companies that succeed in building a coaching culture weave together a long-term approach that requires executive sponsorship, external coaches and the regular equipping of internal managers and leaders in key coaching skills.

SeattleCoach has developed a ["five on-ramp" strategy](#) for organizations ready to build a coaching culture with a focus on developing internal coaching leaders. . .

1. **Executive Coaching.** We begin with several coaching sessions with a team leader to work on their personal, tactical and strategic outcomes. This initial collaboration with the team leader uncovers the next steps in the process and development of both the leader and their team.
2. **Team Meetings.** The leader shares his or her vision for the coming period of growth, and the team works together with the leader and the coach to process both key agreed-upon content along with ground-rules and expectations. Everyone leaves with enthusiasm, a next step and some shared accountability. On-ramp #2 is often repeated quarterly as the team attends to their process and to their shared deliverables. Some examples: Ground rules for new and renewing teams; managing conflict; coaching skills to improve feedback; meeting strategies; consistently getting everyone's best; working with accountability; performance improvement and career development; a leader's personal presence. What does your team need more of? less of?
3. **Introduction to Coaching for Leaders.** As clarity grows about the nature and payoffs of coaching skills and presence, this on-ramp brings a fast-paced and interactive 4-hour workshop for up to

50 key leaders and people managers. In this day together, we introduce everyone to the key concepts and vocabulary of coaching as a people manager. Everyone leaves with some enthusiasm, a next step and some shared accountability. Every time we teach one of these workshops, a handful of leaders ask for more.

4. **Coaching for Leaders, aka, CFL.** A Master Class, not a "tips and tools" training. We select up to thirty-five seasoned leaders, meet for four quarterly off sites, provide customized training in coaching skills and presence, along with on-going peer groups. The result is a little magic. SeattleCoach is a recognized training provider by the International Coach Federation (ICF), so at the close of CFL, each participant receives documentation for 48 hours of coach-specific training.
5. **Our Full SeattleCoach Professional Credentialing Track.** A Master Class. Taught in two Modules by [our internationally credentialed SeattleCoach faculty members](#). We launch two Cohorts in Seattle each Fall, and two more each Spring. Carefully selected mid-career professionals from various backgrounds and organizations come together for a life-changing eight months. This too is a master class that includes 75 hours of coach-specific training that are recognized by the ICF. [\(Click here for more info.\)](#)

Some of the questions that come up for a coach who's used to working with individuals—and beginning to think about working with groups and teams:

- *Other than the person I'm coaching, who should my agreement include?*
- *If the agenda is co-created and focused both on the coachee's agenda as well as on the success of the organization's values and outcomes, how do I handle expectations? What is my ability to challenge, support and offer perspective in multiple directions? What about confidentiality? Evaluation?*
- *How can I make the triangle (coach, coachee, sponsoring organization) an asset rather than a liability?*
- *If I'm an external coach should I bill for initial conversations if I don't have a contract yet?*
- *Is there a difference between an agreement and a contract?*
- *When is it better to use my SME, i.e. to consult?*
- *What about confidentiality?*
- *What about when my coachee wants to invite his or her team into our work together?*
- *Yikes! What about conflicts of interest?*

The following articles are designed to help you start thinking about all of this. The best way to market and to build your reputation as a coach, whether you're internal or external, is simply to do great and compelling work over time. If you do that steadily in the years to come, you will likely be invited to work on the inside of some of companies that are investing in the human and social assets—the growth mindset—that is required of great organizations in the 21st Century.

Read more about it . . .

[It's the Manager](#). Clifton and Harter, 2019

[Coaching in Organizations](#). Blanchard and Miller, 2013.

[Helping People Change](#). Richard E. Boyatzis. 2019.

[The Ideal Team Player](#). Patrick Lencioni. 2016.

[Executive Coaching with Backbone and Heart: A Systems Approach to Engaging Leaders with Their Challenges](#). Mary Beth O'Neill. 2007.

[Leaders Eat Last: Why Some Teams Pull Together and Others Don't](#), Simon Sinek. 2014.

Research and Professional Journals

- [This interview with Jim Harter](#), Chief Scientist for Workplace at Gallup.
- This interview from HBR is a bit longer, but you'll be inspired: ["Building a Company Everyone Loves."](#)
- From Forbes, December 2012: ["Why most leadership training doesn't work \(and why leadership development does\)"](#)
- From HBR: ["You Can't Be a Great Manager if You're Not a Good Coach"](#)
- [The International Coach Federation](#). Every year the International Coach Federation (ICF) does a research project with the Human Capital Institute about the impact of coaching on employee engagement, ["Building a Coaching Culture."](#)
- [Coaching: An International Journal of Theory, Research and Practice](#)
- [International Journal of Evidence Based Coaching and Mentoring](#)
- [The Neuroleadership Institute](#)
- [Society for Industrial and Organization Psychology](#)

Appendix: Article I

“What Happens When Leaders Learn to Coach?”

(Note to SeattleCoaches: I provide this article to companies ready to develop a coaching culture via our [five on-ramps for developing coaching leaders](#).)

At SeattleCoach we believe that coaching is a 21st Century leadership movement. Organizations are seeking and developing leaders who are both empathic and agile--both with their markets and with their talent. Jobs and careers are changing. What isn't changing is the fact that people who find ways to work well together (and with their screens) are more likely to, as we say at SeattleCoach, "make money, have fun and do good" in the short time we all have on the planet.

We think of coaching as a way of partnering to create highly customized and collaborative, just-in-time adult learning and leadership development. Leaders who have experienced coaching usually begin to listen differently, to ask questions differently and to keep a laser-focus on agreed-upon priorities, competencies, competitiveness and performance. Their teams then join the learning and the results can be impressive and contagious, the ROI, compelling.

At SeattleCoach, we have trained and developed hundreds of leaders, managers, physicians and faith leaders as coaches in scores of small, carefully chosen Cohorts. Many have earned professional credentials through the International Coach Federation (ICF), all have become better professionals, maybe even better people.

Approximately half of the coaches we've trained have become entrepreneurial, external coaches. Just as many have stayed in place in great companies and organizations based in the Pacific Northwest.

In the Coming Years

External coaches will continue to be crucial. Their impact has become contagious as organizations have now begun to develop internal coaching leaders and through them, coaching cultures. From C Suite leaders to new hires and high-potentials, the ROI is compelling:

- ***Improved engagement, development and retention of key talent—at every level and every generation, and***
- ***Improved leadership development—at every level and every generation,***
- ***Better performance individually and by teams—even and especially in times of conflict and rapid change,***
- ***Motivation and lowered stress as people connect what they do in the majority of their adult waking hours with what matters most,***
- ***And in countless conversations, meetings and human connections things just go better.***

Forward-thinking organizations are beginning to explore a new question: *What happens to a company's growth mindset, culture, values, leadership at every level--and to their costs--when senior leaders themselves learn to coach?*

As companies [partner with SeattleCoach](#) to sponsor and customize their own internal coach-development programs, they embed a coaching mindset into their culture by equipping senior leaders in the key skills, presence, models and competencies of leadership coaching.

With each of our “[on-ramps](#)” we talk about how people-managers can best grasp the scalable, high-trust practices of coaching leadership. Leaders begin to:

- ***Understand the neuroscience of human change and its impact on good and bad resistance,***
- ***Use their own style and temperament,***
- ***Balance advocacy and inquiry, knowing when to coach—and when not to,***
- ***Find the coaching agenda that address both performance and production and***
- ***Make the solid delivery of perspectives and feedback an on-going practice at all levels.***

At SeattleCoach we think of coaching as a crucial additional gear in the engine of a seasoned leader. We think of it as simply, ***an elegant conversation of any length that facilitates innovation, improved performance, crucial results and talent retention and is marked by:***

- ***Clear agreed-upon outcomes,***
- ***The participant’s initiative, strengths, assets and solutions,***
- ***The coach’s proven models, frameworks and competencies and***
- ***Increased systemic health at every level of their shared organization.***

So, “What Happens When Leaders Learn to Coach?”

Some key questions we raise with companies that are ready for that question: *Who will champion the process? How will you select the first key leaders? What are the real and immediate needs and starting points? How will we measure success? And what will internal coach development look like as it is customized for your organization?*

The nature of work has changed. Their most talented employees are looking for two key elements:

1. Work that matters—a sense of purpose and service, and
2. Opportunities at work for personal and professional development

And if both elements are not present, those employees are more likely to change companies than they are to simply change jobs. And, as always, the determining factors are the company culture and its managers.

Companies that succeed in building a coaching culture weave together a long-term approach that requires executive sponsorship, external coaches and the regular equipping of internal managers and leaders in key coaching skills.

Click [here to order](#) copies of my book, [The Essential Coaching Leader](#).

A from a few favorite thought-leaders:

Books

[Leaders Eat Last: Why Some Teams Pull Together and Others Don’t](#). Simon Sinek. 2014.

[Helping People Change](#). Richard E. Boyatzis. 2019.

[The Ideal Team Player](#). Patrick Lencioni. 2016.

[Executive Coaching with Backbone and Heart: A Systems Approach to Engaging Leaders with Their Challenges](#). O'Neill. 2007.

[Emotional Intelligence](#). Daniel Goleman. 2005.

[Social Intelligence](#). Daniel Goleman. 2006.

Research and Professional Journals

- This interview from HBR is a bit longer, but you'll be inspired: [*"Building a Company Everyone Loves."*](#)
- From *Forbes*, December 2012: [*"Why most leadership training doesn't work \(and why leadership development does\)"*](#)
- [Coaching in Organizations](#). Blanchard and Miller, 2013.
- From HBR: [*"You Can't Be a Great Manager if You're Not a Good Coach"*](#)
- (Here's the bad news) The Gallup organization's ["State of the American Workplace,"](#) ten years of study show that seventy-five percent of American workers are chronically "Not Engaged" or "Actively Disengaged". The good news: Excellent coaching can help leaders and their teams to increase levels of hope (p.11 of the study) and communication (p.12).
- [The International Coach Federation](#). Every year the International Coach Federation (ICF) does a research project with the Human Capital Institute about the impact of coaching on employee engagement, [Building a Coaching Culture](#).
- [Coaching: An International Journal of Theory, Research and Practice](#)
- [International Journal of Evidence Based Coaching and Mentoring](#)
- [Choice: The Magazine of Professional Coaching](#)
- [The Neuroleadership Institute](#)
- [Society for Industrial and Organization Psychology](#)

Appendix: Article II

Agreements and Contracts

Successful engagements always begin with lots of clarity and grace. As a coach you ask the right questions and begin to identify key people, key objectives and the outcomes/markers that will spell solid ROI for an organization and its employees. You get clear on the scope of the agreement. As always, if new agenda and players appear, do some evaluating and updating of your agreement.

Whether you're a coaching leader or an external coach, when you begin to build a contract, in the words of Seth Godin, you answer a version of three core questions:

- *What happens first/next? What will you invite the organization to expect from you? What are your clear expectations of them? Who gets to weigh in on the agenda?*
- *What happens if things don't work out? If someone doesn't do what they say they'll do? Do both you and the organization have options to evaluate and conclude? Any time?*
- *What happens if things do work out? What if the organization and its people love what you do? What could upcoming stages of work together look like? Would your availability increase? Would your compensation change?*

In general, an excellent coaching agreement/contract unfolds like this:

- I. **The possibility opens up:** Someone contacts you or gets curious via your well-crafted way of talking about what you do. Usually, there's a sponsor/leader (i.e. the person paying you who may or may not be the person to be coached) and the coachee and/or coachee team. Maybe this is all new to them. Maybe this routine. You'll want to be prepared for either conversation.
- II. **You set up an informational interview** to explore the work and to engage with the sponsor (the person paying you) and/or the person(s) to be coached. Sometimes the person to be coached is a manager or team leader. Sometimes the manager or team leader is the sponsor of the potential coachee: Will they want to be actively involved with the process and in setting the agenda? Will they simply want periodic updates? It's good to find out.

Whether it's with the sponsor or the coachee, these first conversations are usually with a motivated influencer in the system. As always, start with the person who is most coachable and motivated. Remember, as always, you're finding the agenda, getting clear about what outcomes and success look like, finding out who needs to be in this process, everyone's expectations, how evaluation will happen and the best ways to get started.

As always, if I invest plenty of unpaid time in connecting and getting clear about outcomes and agreements, it pays off in the long run. I don't charge for informational conversations—and in organizations sometimes there are several people to touch base with.

Some of the questions I tend to ask the potential coachee and often their sponsor or manager:

1. What do you want to work on?
2. From your point of view, what would the evidence be that we're succeeding?

3. Why does it matter?
4. Who else is in your thinking as we begin this conversation?

Sound familiar? I may also be curious about:

- *What would you need and want to get better at along the way?*
- *What would your whole system—and its individual members need to get better at?*
- *What would the benefits be? For you? For your whole team or organization?*
- *If this really worked, what obstacles and opportunities would you take on together?*
- *What would you want to invite your team to expect from you?*
- *What would you like to expect from your team?*

And as always, these are questions to anticipate from a manager/sponsor when you are interviewing for a group/team gig. They may be direct, but these are the questions they will have about you:

1. What do you do?
2. What do you specialize in?
3. What happens as a result of your work?
4. What's the first thing you'll do? (Laymen's terms)
5. Then what happens? What steps? Structures?
6. Then what?
7. In your work,
 - a. What can you say is verifiable?
 - b. What have you seen is repeatable?
 - c. What is predictable?

Along the way I provide lots on information about how I'll approach things.

Keep asking yourself, "How do I like to work?" Figure out the what's and how's. For me this has been a combination of learning from people whose work I respect and from my own sense of how I'd want someone to contract with me.

III. Once you decide it's a "match", talk about the budget and explain your terms, how you see the stages of the work, how you'll evaluate progress and how you will charge for your time. It's here, after enough conversation, that I propose (in writing) a simple **Statement of Work** (SOW—there's an example below) which includes a description of the work, deliverables, schedules, milestones and specifics as I see them along with how I'll bill for my time. As always, the agenda belongs to the coachee so the SOW may go through some collaboration. As Peter Block says, *"Offer tools to make the decision, not the decision."* My approach is to charge enough to be generous. That is, when I put together a multi-faceted SOW, I think of it as a package and am clear about everything I include: Lots of accessibility and responsiveness. If I'm unsure of all of the dimensions of the work, I may charge by the hour. Otherwise, if I have established a good idea of what the project or deliverable will require, I give my coachee a solid estimate of what I will charge for each stage of the work—and how we'll communicate and evaluate along the way.

Expect the organization that hires you to ask for your FEIN so they can send you a 1099. And they'll usually want proof of insurance. If you need to set up these things, check out [this page](#) on the SeattleCoach website.

IV. You have a signed agreement or SOW and you get underway: Scheduling, Engagement/Implementation, Evaluation

In the initial phases of this work, I may spend several sessions coaching the sponsor or leader. As we build alliance, agreement and agenda, we may then expand the conversation to his or her larger team. ([The SeattleCoach Five-On-ramps for Developing Coaching Leaders](#)).

If we do, I like to have conversations with all the key players, either individually or together, keeping the sponsor/leader in the loop for evaluation and recommendations. As always, be thinking about their satisfaction and outcomes—and about their trust in you and your brand.

- Keep asking yourself, “How do I like to work?”
- Work hard on the details that matter.
- And never stop exploring the coachee’s outcomes, problems and opportunities.

V. Extension, Recycle, or Termination. Again, Block writes:

“There are many options for ending the relationship and terminations should be considered a legitimate and important part of the consultation. If done well, it can provide an important learning experience for the coachee and the consultant and also keep the door open for future work with the organization.

“The deliverable is delivered, the gig is wrapped and the customer is happy. Heaven. It is the best time to offer your services for problems identified during the gig implementation. Market it, sell it, close it! You’d never have a better chance to promote your services.

“The gig went all wrong? Terminate it as if it was successful – with a smile. Keep doors open, never slam it. You might get another chance in the future with the customer. Is all the investment you made still worth something?”

As with the individuals I coach, I try to not make my agreements look like a EULA. I’m simple, clear and include all of the “here’s-how-I-like-to-work” terms that matter to me. This keeps me on track, paying attention to the right details and generous.

Read more about it . . .

If you don’t read anything else, read [Getting Naked](#). Patrick Lencioni. 2009.

From [Embedded.fm, episode #199](#), a conversation between a couple of engineer/developers about their contracts and agreements. A little geeky and meandering but potentially useful to our work too.

The ICF has put together [this great list of FAQs](#) related to staying ethically on-track as an organizational or team coach. [Flawless Consulting: A Guide to Getting Your Expertise Used](#). Peter Block. 2011.

[The Speed of Trust: The One Thing That Changes Everything](#). Stephen M.R. Covey. 2006.

[Coaching in Organizations](#). Linda J. Miller MCC and Madeleine Homan Blanchard MCC. 2013.

Appendix: Article III

A Sample Statement of Work

(for external coaches and those who hire them)

Hiring Company	
Street Address:	
City, State, Zip Code:	
Contact Names	
Phone and Email Address	

You	
Street Address;	
City, State, Zip Code:	
Contact Name	
Phone and Email Address	

SOW Effective Date ("Effective Date"):	
SOW Expiration Date:	

1. Description of the Work

Your overview of the work connected to the organization's agenda.

2. Deliverables/Delivery Schedule

Milestone #	Brief description of work to be completed in each stage of work	Due on or before
1		
2		
3		
4		
	Continued evaluation and customization as needed	

3. The Specifics

What will the payment arrangements be: Prepayments? Monthly invoicing? How will you charge for each milestone? What is included? Email? Phone calls? Evaluation? Invoicing specifics? They will have their own specifics that you'll want to consider. How will you invite the sponsor to weigh in on the agenda and on evaluating progress and process?

4. Payments

As final payment for this completed and delivered work by (you), (they) will pay a total fee of _____ USD for the following milestone payment schedule:

Following milestone #1	
Following milestone #2	
Following milestone #3	
Following milestone #4	

You**Them**

 By (Sign) Authorized Representative

 By (Sign) Authorized Representative

 Print Name

 Print Name

 Print Title

 Print Title
Confidentiality and Non-Disclosure

As your Coach, I will do all in my power to keep confidential all communications between myself, (the org) and its employees. I'll stay in touch with sponsors about trends I see, including anything that could be potentially damaging to either the company or to an individual. As always, communication by e-mail and cell phone may not be secure. Companies that find ways for communication to flow most freely and constructively tend to do better. In light of that, I will invite a conversation about confidentiality with each person and group I work with. And rather than being the reporter of challenging conversation, I will ask that, when necessary, the coaching will address how individuals can best approach difficult conversations themselves. I will be rigorous about The International Coach Federation Code of Ethics.

Resolving Differences

I want you to be really satisfied with our work together. If, at any time, you feel that our outcomes 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.

Your Signature:

Date:

Your Executive Coach:

Date:

Appendix: Article IV

Preparing and Leading a Meeting Like a Coach

We all know that sometimes “check-in” is simply a time of pleasantries while a team waits for the late comers to arrive. But as the leader becomes fluent in their use of the **Coaching Leader’s Arena**, their meetings change. Whether your meeting is (1) a huddle to address urgent and tactical obstacles and opportunities, or to clarify expectations or (2) a higher-level strategic meeting or (3) a less frequent, equally crucial, team meeting, think about this acronym:

ASK US

Anticipate as you build the agenda

What’s top of mind for you? Your hunches? Your outcomes? (Same question in advance to everyone who will attend your meeting.)

Set the table and make it worth being on time

In any gathering, personal or professional we know the difference between being “expected” and being “wanted.” Mark the moment like a host. Invite people into “second layer” Big Emotion.

Know the power of your **respect, energy, acknowledgment & listening**

Good-news-bad-news: Leaders are contagious.

Use prompts to help people identify what matters, what needs to be said

What’s distracting you? What’s top of mind? What are the outcomes that will make this a good meeting? What are the questions we need to answer? Ideas you want to bring up?

Set time limits for “check-in”-- leave time to return to it

When a team member brings up something big during check-in, call a time out and add their item to the larger agenda to which you’ll return after everyone has checked in. Checking-in well takes time if people are working at level 3, but if you and your team are well-prepared, it’s not unusual for a great check-in to become seamless with the larger shared agenda.

Read more about it . . .

[The Advantage](#). Patrick Lencioni. 2012.

Appendix: Article V

Using the Gallup Q12 Employee Engagement Survey in Coaching and Leadership

The [Gallup Q12](#) is an ongoing survey designed to measure employee engagement. The instrument was the result of hundreds of focus groups and interviews. Through rigorous research, Gallup has identified 12 core elements that link powerfully to key business outcomes. These 12 statements have emerged as those that best predict employee and workgroup engagement and performance. To date, over a million employees have participated in the Q12 instrument.

1. *Do you know what is expected of you at work?*
2. *Do you have the materials and equipment to do your work right?*
3. *At work, do you have the opportunity to do what you do best every day?*
4. *In the last seven days, have you received recognition or praise for doing good work?*
5. *Does your supervisor, or someone at work, seem to care about you as a person?*
6. *Is there someone at work who encourages your development?*
7. *At work, do your opinions seem to count?*
8. *Does the mission/purpose of your company make you feel your job is important?*
9. *Are your associates (fellow employees) committed to doing quality work?*
10. *Do you have a best friend at work?*
11. *In the last six months, has someone at work talked to you about your progress?*
12. *In the last year, have you had opportunities to learn and grow?*

Comparisons of engagement scores reveal that those with high Q12 scores exhibit lower turnover, higher sales growth, better productivity, better customer loyalty and other manifestations of superior performance. The engagement index slots people into one of three categories.

- Engaged: Employees work with passion and feel a profound connection to their company. They drive innovation and move the organization forward.
- Not Engaged: Employees are essentially “checked out.” They are sleepwalking through their workday. They are putting in time, but not enough energy or passion into their work.
- Actively Disengaged: Employees aren’t just unhappy at work; they’re busy acting out their unhappiness. Every day, these workers undermine what their engaged co-workers accomplish.

These are the findings based on a random sample of 30,628 full- and part-time U.S. employees working for an employer from January to June 2018.

- Engaged employees – 34%
- Not-engaged employees – 53%
- Actively Disengaged – 16.5%
- In other words, even though these engagement results **are the** highest since Gallup began reporting the national figure in 2000, 69.5% of the workforce is either under-performing or actively undermining their work

Key questions for managers and coaches and teams:

- As you reflect on the Q12, what Level III questions could you ask?
 - What leadership behaviors do you think would address and cultivate the Q12?
 - How could you help your leaders to model and foster those behaviors?
 - How could you use the Q12 in hiring? For talent and strengths? For outcomes and fit?
-

Read more about it . . .

[It's the Manager](#). Jim Clifton and Jim Harter. 2019.

[First Break all the Rules: What the World's Greatest Mangers Do Differently](#). Marcus Buckingham. 2016.

Appendix: Article VI

Using Other Assessments and Inventories in Individual and Team Coaching

*“Train up a child in the way he should go and when he is old, he will not depart from it.” Proverbs 22:6
(Patty’s long-winded paraphrase: “Parents, inaugurate your child onto the path of a good life by appreciating their unique dispositions and strengths—their singular characteristics. This is a course from which people, as a general rule, will not deviate.”)*

If you’re a good coach, any assessment is a supplement, not a substitute. As with any coaching tool, the purpose of an assessment is to help people to have a conversation with themselves and then with you and others about their “way.” In choosing which assessment to use, ask yourself what this individual or team wants to become more aware of, to measure or inspire.

- *Do you want to get clarity about a person’s true and emerging strengths, values and interests? Information about their aptitudes and ambitions?*
- *Are you working with a team in which the members are ready to leverage their relationships towards greater development, cohesiveness, shared values and even comfort with disagreement? Maybe it’s a team that will even be brave and kind enough to help some members to leave for a better fit.*

A negative consequence of some assessments is what Carol Dweck has called, “a fixed mindset.” We’ve all heard it: *“I’m red energy! Deal with it!” “I’m an SF—don’t make me do conflict!” or “I’m a C—just let me take care of the data.”*

Remember the questions that we’ve addressed with the “Coaching Leader’s Arena?” With any assessment, a coach will be curious:

- *What is your personal strength? Your reflexive “default”?*
- *What happens when you use it really well?*
- *What happens when you over-use it?*
- *What happens when you’re tired?*
- *Where/when/with whom could you experiment with a ten percent shift?*

I’ve used each of the following tools, to supplement my work with individuals and teams. If you’d like to use an assessment (as an assist, not as a substitute for your partnership), learn more about each of these (not an exhaustive list). You’ll also want to find out if the assessment or inventory that interests you stands alone (i.e. you can just purchase and use it), or if you need training, or even certification to use it.

These are some of the most common. As with any tool, as a coach you need to be ready to explain your choice.

First, I invite conversations about values, skills, abilities, strengths and experience using the simple self-report 360 tools we’ve reviewed in coach training:

Your DATA (Module I) and

The Vocáre Compass (Module II)

Both can be valuable as pre-work. Consider yourself trained in the use of these narrative SeattleCoach instruments. Just leave in my copyright and contact information.

Second, because my work is primarily with teams that are cultivating a coaching culture, rather than using diagnostic tools, I use the strengths-focused [Via Survey](#) that you took at the start of coach training. It is simple, free and you don't need special training. And as a coach you can easily work with people to explore ways in which their "signature strengths" will support the agenda they are working on from the very start.

The other great (paid) strengths-based assessment is the [CliftonStrengths Assessment](#) (formerly CliftonStrengths Finder).

Finally, if you are working with clients to assess their career interests: The [MBTI® Career Report + Strong & MBTI Combined Career Report + Strong Profile*](#)

And if your client wants to explore their style, their temperament or behavioral preferences, consider the following:

- The [Enneagram](#)* This link will take you to the work of our SeattleCoach Enneagram specialist, Elyse Nakajima.
- The [Core Values Index](#)*
- The [DISC](#)
- [Insights](#)*

* Require you to be trained or certified.

Appendix: Article VII

“Getting to Whoosh”

Rowing Metaphor #1

A thirteen-foot oar hangs in the main meeting room in my offices on Lake Union in Seattle. It was used for years in the racing shells that row past, through the Montlake Cut and into Lake Washington. For ten years I rowed the “eights” competitively and practiced the lessons of the beautiful sport. The old oar in my office reminds me of how those lessons apply today as I coach the men and women and teams who meet under it. These are a few I’ll never forget.

1. My rowing coaches helped me to value consistent, disciplined, inspired effort even more than breakthroughs or epiphanies. That meant three or four mornings a week at 5:00 am with my friends, usually in the cold and dark. The lesson: Determine what you long for and commit to it. Having allies that are equally committed and who over time become your friends makes it more fun.
2. Racing shells that are powered by balanced rowers are designed to go fast. New rowers are strong and enthusiastic, but they are tempted to wrestle the oar and those sliding seats. They will soon join the rhythm of the other rowers, but for now they check the momentum of the boat that just wants to go fast. When teams are just forming, they tend to get tired and wet and not go fast. But as they learn to cooperate—with the boat and the water, with their own bodies and with each other—they learn the simple, strong rhythm of push and glide. Even when they’re pulling hard, veteran rowers make it look elegant. The lesson: Look and listen for the rhythm and “the run.” Learn to find it and repeat it.
3. Resistance is part of what makes a boat go fast. When rowers drop their blades into the water at just the right moment, and then quickly engage their strength to move against the resistance of the water, the boat surges. And with every stroke, the momentum is more in their favor. The lesson: Resistance doesn’t have to be the enemy if you can get the ratio right between the challenge and the glide.
4. As the momentum turns in a race, the temptation is to start looking around. Rowers may face backwards, but they can clearly see their place in the race. Like all competitors, they watch, *Where’s the competition? How are they doing? Who’s ahead? Am I strong enough? Can I keep this up? Starting to get tired, and here comes the sprint.* The lesson: Focus on your own race. Love the competition. You are consistent, disciplined, trusting yourself, your boat and the other rowers.
5. And maybe you hear it. Whoosh. Whoosh. Whoosh. And then maybe you feel it. Veteran rowers call it “swing.” From a dead stop, your strokes have brought up the speed and lifted your boat through the water. As you come forward for each new stroke, the wheels on your seats roll evenly, not breaking the momentum, but cooperating with it. Push and glide. Crisp. Clean. Elusive. The lesson: Momentum will take on a life of its own.

Parts of the race are steady and not very glamorous. And then you burst into a sprint to the finish line. Which strokes win the race? None of the rowers could say for sure. What they will tell you is that in the final 500 meters, if they are rowing well, it’s a combination of skill, trust, challenge, strength, conditioning, cooperation, rhythm, balance, effort and magic as the boat runs beneath them. Like competitive rowers, people who are working hard to refocus their lives, work and teams engage all of those things too, usually with very little fanfare. But when the magic of “whoosh” begins to take hold, they know it. And the magic is compelling.

Appendix: Article VIII

“A Rowing Coach Has to Decide”

Rowing Metaphor #2

A thirteen-foot oar hangs in the meeting room of the SeattleCoach offices on Lake Union in Seattle. It was used for years in the big racing shells that row by, through the Montlake Cut and into Lake Washington.

For ten years I rowed these “eights” competitively and learned lessons from this beautiful sport. The old oar at the front of the room where I teach reminds me of how those lessons apply today as I coach the men and women who walk by it every day.

Here’s one of the best: When a rowing coach puts together a competitive eight, she asks her rowers to compete for their seats: Who should be in this boat? Who should be in which seat? She knows that each seat has its own requirements and psychology. She asks the same questions any good leader asks--questions of strength, skill and grit are pretty easy to measure. But veteran coaches also ask an intuitive question about fit:

“Do I choose the eight best? Or the best eight?” Which eight can row as one? Each rower unique, well-placed, committed and connected.

The eight best? The best eight? Guess which crew usually wins?



About the Author



As a leader, facilitator, speaker and coach of leaders, Patricia ("Patty") Burgin has advised and mentored thousands of individuals and teams toward better performance, communication and meaning. She is the author of the new and bestselling overview of leadership coaching, *The Essential Coaching Leader*.

Following stints in the international leadership of a Christian nonprofit, as a conference speaker, as a tour leader in the former Soviet Union and as a licensed marriage and family therapist, Patty founded SeattleCoach® in 2003 and began to coach and facilitate exclusively in 2005. In 2008, she launched the SeattleCoach Professional Training and Development Program, which is credentialed by the industry-standard International Coach Federation (ICF).

Whether it's a class or a keynote, Patty values insight creation as the crucial component of content delivery. "I love it when my brain lights up," she says. "And it's even better when everyone else's brains light up." She works with an approach that is warm, practical, innovative, direct, playful and generous.

She holds two master's degrees, one in Theology and a second in Applied Behavioral Science and has joined the top 4 percent of credentialed coaches worldwide to have been awarded the title of Master Certified Coach by the ICF.

A native of the Pacific Northwest, Patty loves just about everything about it: the water, the coast, the mountains, the great IPAs and "*not having to squint as much as Californians do.*" During her freshman year at Oregon State University she was named "Smart Ass of the Year" by members of her sorority. She lives near the Seattle Zoo with her partner, Dr. Kari, a veterinarian--and with a revolving assortment of creatures.

With Patty's background as a competitive rower and as past president of Interlochen Rowing Club in Seattle, she sometimes takes executive teams out on the water with her. When a team sits together in a racing shell (60' x 18"), the experience quickly produces soggy metaphors and boatloads of team learning.

Her faith still informs her life and work, helping her to explore how human brains and relationships flourish, how we make sense of the tough stuff and how we live out those big what's-it-all-about questions that we share through the arcs of our lives. She thinks excellent coaching is like grace: rarely intrusive, usually disruptive, more nuanced than announced and just as much about *how* as *what*.