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Foreword

We have had the pleasure and great opportunity to participate in the growth and acceptance of professional coaching over the last dozen years. An exploding field can provide a great amount of energy and learning, allowing us a special time to play witness to human progress. We have seen first hand through both the practice of and research of professional coaching the proven positive results coaching can have on both individual and overall human performance. At its core, coaching is about building a co-creative relationship around change. In a world where change seems to be “coming at us” at an increased pace, where so often that awareness yields anxiety over excitement, we at CTA are thrilled to offer an opportunity for coaching to be integrated into professionals lives to turn that energy into a huge net positive. As you will learn in this course, coaching tools that are properly used can be married to existing professional capability to propel clients, employees and even ourselves into new arenas of awareness, capability and results. We have developed this course to afford well-meaning professionals the opportunity to learn, practice, and apply core coaching skills to enhance their professional lives.

Integrating the core coaching skills of professional life and executive coaches into other professional applications may seem novel. Perhaps so. However, as coaches and as part of a leading coach training organization, we can help but acknowledge how many great leaders of change and providers of counsel find their success in the deployment of some of the skills to which you are about to be exposed. We like to imagine what a better world we could have in so many environs if the

intention of performance were aligned with the skills of a great coach. Watching these applications integrated into areas of demanding great change and leadership is our reward. Educating you to afford this opportunity is our intention.

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Core Coaching for Effective Change A Foundational Workbook

Welcome to the Core Coaching Program Workbook

Congratulations on taking this big step!

Prepare for an exciting journey together. Over the coming months, you will discover and create your own unique coaching style as you effectively bring added value by applying these new skills.

This comprehensive program will:

- Train you in the most effective tools for coaching
- Inspire you to think like a Mentor Coach
- Provide the methods and principles to work as a Mentor Coach
- Guide you to achieve masterful coaching skills
- Help you integrate and apply these skills in your existing professional or business context

This 12-week comprehensive live training program combines the curriculum of the Core Coaching Program Workbook with group mentoring, live coaching practice, critique, and feedback. Your destination is reached more easily with a built-in coaching community in the Core Coaching Program.

Help Along The Way

The essentials of the significant body of knowledge of coaching are contained in this Workbook. The seminars of the live program will supplement, apply, and enhance your working knowledge and skill

set.

If you've opted for self-study, we recommend you set a time limit to complete each of the four sections (one per month, as a suggestion) and stay on schedule to maintain your momentum. If you engage the material and apply the principles and tools to yourself initially, within four months you will reach a level of comfort with the practices and be well on your way to working with your clients.

Use the SMART Goals in Section II to set a timeframe for accomplishing your goals for this program.

The Action Challenges

The secret is to put consistent and persistent energy into building your comfort and expertise every day. Remember to take one step at a time, one small increment of understanding and change in your way of thinking and responding, and to do this consistently for building your skills. The result will be not only a new skill set with the acquisition of this body of knowledge and its application, but a new mindset of listening and responding to others.

The Core Coaching Program Workbook is best used as a foundational source of continuing education. There is a wealth of information included in this comprehensive program. You are not expected to absorb it all the first time through the course. As you grow as a Mentor Coach, you will experience the information in new and different ways.

Coach Training Alliance encourages coaches to commit to a path of lifelong learning and continuing education. We encourage your disciplined approach to the expansion of your capabilities. Like other professionals, coaches have a responsibility to ongoing professional development. Established coaches often commit to 12 or more hours of continuing education per year. For continuing education resources,

see: <http://www.coachtrainingalliance.com/business/>

Resource Library

The Resource Library is a toolkit of:

- Supporting documents
- Related articles
- Topic enhancers

These documents and articles appear in the final section of the Workbook, and are referenced in the section of the program that corresponds to that document.

Supporting Documents

These accompanying materials enhance learning and comprehension. Supporting documents are critical to your training and should be included in your studies with each lesson. You will find in-depth explanations of concepts, exercises, and templates that are designed to increase understanding and facilitate implementation. These are in the section titled **Supporting Documents**.

Related Articles

Articles that provide additional insight and expansion of material are located in this section. These are contributions from various coaches and other experts and are included to enhance your experience and knowledge. These are in the final section of the Workbook titled **Related Articles**.

Support Tools

This is the online portion of the program. The resources and opportunities provided here are updated and refreshed. Online

access of these support tools is at:

<http://www.coachtrainingalliance.com/resources/tools.htm>

In this section you will find:

- Templates of documents that you can use as a framework for coaching.
- Recordings and other educational presentations available to you at no charge.
- Recommended eBooks and other coaching products.

It is not necessary to implement all of the tools or recommendations at once. These are provided as a resource and can be incorporated into your work at a pace that is comfortable for you.

The principles, tools, and skills you will acquire in the Core Coaching Program will be a process of consistent improvement. Your coaching skills, the tools you choose to use, and style you develop will be revised, reformed, and refined over time. These Support Tools are available to you when you are ready for them.

Note About The Digital Version

Access to all of the Internet Resources, including instant navigation throughout the entire online program can be accessed in the **Core**





Getting the Most from this Program

What you will see here is the guidance, direction, and the wisdom of experience. This comprehensive program is a compilation of best practices integrated into a unified focus on Mentor Coaching.

Each component helps you build on your existing skills and experience integrated into the cumulative process of learning in this program. It has been organized, edited, and condensed into a dosed and timed application to fully develop your Mentor Coaching skills.

You will:

- Benefit from the coaching experience of others
- Discover shortcuts that will take years off your learning curve
- Accelerate the development of your skills as a Mentor Coach and the ability to make a difference with each client

And you'll experience a few things that you didn't sign on for. Those experiences will reveal themselves when you most need them, and least





expect them.

The Five Major Sections of Your Training

There are five major areas of focus to help you integrate existing experience and skills with your evolving expertise as a Mentor Coach. They are in a sequence that will accelerate your progress along your own path.

1. *Introduction: Mentor Coaching Definition and Scope*

- The unique body of knowledge, skill set, and application of Mentor Coaching
- The art and science of coaching conversations
- The distinction of coaching from therapy, counseling, and consulting
- The unique perspective of Mentor Coaching as a catalyst for change
- The context of Mentor Coaching

2. *Core Coaching Skills*

- The development of the unique mindset of Mentor Coaching
- Fundamental internal perspectives and skills of being a coach
- Co-creating the context, relationship, and conversation
- The location and conversations that bring significant value

- Understanding story development and the principles of change

3. Core Coaching Principles and Tools

- Developing your unique voice as a Mentor Coach
- Powerful questions and effective tools of coaching
- The basic Mentor Coaching model
- Strategic goal pursuit and fulfilling the client's agenda
- Coaching interactions and decision clarification

4. The Process of Change

- The role of the mind and brain in change and in creating a new story
- The psychology and neuroscience of change principles and choice architecture
- Facilitation of change and dynamic coaching
- Mentoring change and navigating transitions

5. Co-creating and Sustaining Success With Clients

- New learning and strategies to deal with change
- Common mistakes and how to avoid them
- Action and growth plans for achieving goals
- Elements of mentoring a successful change
- Principles of sustaining and internalizing growth



Core Coaching for Effective Change A Foundational Workbook

Table of Contents

Introduction: Mentor Coaching Definition and Scope	21
<i>What Is Mentor Coaching?</i>	21
<i>What Constitutes Core Coaching?</i>	23
<i>The Art and Science of Coaching.....</i>	25
<i>The Art: A Creative Conversation.....</i>	25
<i>The Science: A Synthesis of Disciplines</i>	26
Contingent Conversation and Powerful Questions.....	31
Coaching vs. Therapy and Counseling	33
Coaching vs. Consulting.....	35
Mentor Coaching as a Catalyst for Change	37
<i>Problem vs. Possibility</i>	37
<i>The Emergence of Mentor Coaching.....</i>	37
<i>The Need for Mentor Coaching.....</i>	38
Understanding the Context.....	43
Section I Core Coaching Skills	45
<i>What Is Unique to Mentor Coaching?</i>	45
<i>Coaching from Center</i>	47

Creating Value from the Inside Out.....	49
Balancing Doing with Being	51
Co-Creating the Relationship	53
<i>The Mentor Coach’s Role</i>	53
<i>The Client’s Role.....</i>	54
Responding Intuitively	57
A Context for Mentoring Change.....	59
<i>Neutrality</i>	59
<i>Empathy.....</i>	60
<i>Insight</i>	61
Communication and Connection	63
<i>4 Maxims of Communication.....</i>	63
<i>4 Steps of Communication.....</i>	64
Recognize Active vs. Passive Positions.....	67
Effective Conversations.....	69
<i>Communicate from a base of empathy.</i>	69
<i>Seek to understand—not to change.</i>	69
<i>Clarify the focus and agenda.</i>	70
<i>Reflect back what you hear.....</i>	70
<i>Listen to self-statements.</i>	71
<i>Acknowledge the different roles you each have adopted.</i>	71
<i>When communication breaks down, step up.</i>	72

Self-Statements	<u>73</u>
Point of Reference and Locus of Authority	<u>75</u>
<i>External Authority Phrases</i>	<u>76</u>
<i>Limitation Words</i>	<u>76</u>
Passive Position to Active Intention	<u>77</u>
<i>Passive Positions</i>	<u>78</u>
<i>To challenge a client's belief</i>	<u>78</u>
Section II Core Coaching Principles and Tools	<u>81</u>
<i>Effective Coaching Tools</i>	<u>81</u>
<i>Developing Your Unique Voice As a Coach</i>	<u>83</u>
<i>Two Dynamic Coaching Equations</i>	<u>85</u>
<i>What To Listen For</i>	<u>87</u>
<i>Delivering Powerful Questions</i>	<u>89</u>
<i>Five Types of Questions</i>	<u>91</u>
<i>Open-Ended Questions Who? What? When? Where? How?</i>	<u>93</u>
<i>A Summary of Listening as Mentor Coaches</i>	<u>95</u>
<i>The Basic Mentor Coaching Model</i>	<u>97</u>
1. <i>Specify the client's agenda</i>	<u>97</u>
2. <i>Determine useful intervention moments.</i>	<u>98</u>
3. <i>Shift the perspective</i>	<u>99</u>
4. <i>Frame the session</i>	<u>99</u>
5. <i>Follow up</i>	<u>100</u>

Strategic Goal Pursuit	101
SMART Goals	101
Initiatives	101
Next Best Action.....	101
Fulfilling the Client’s Agenda	103
Seizing the Coachable Agenda	113
Offbeat or Repeated Words and Phrases.....	114
Missing Pieces in the Story.....	115
Strong or Weak Energy.....	117
Inconsistent Statements	117
Nervous Laughter or Sighs	119
Sudden, Strong or Contradictory Emotions	120
Assumptions, Interpretations, Limited Perspectives.....	120
Role Inflation	122
Throw-Away Comments	123
Success Insurance for Completing Goals	127
11 Steps To Ignite Change	129
Basic Tenets of Mentor Coaching	131
Choice Architecture	133
Coaching Interactions	137
Decision Clarification	141
Script specific behaviors	141
Shrink The Change	142

<i>Your Undeniable Benefit Statement</i>	<u>145</u>
<i>Group Coaching</i>	<u>147</u>
<i>Ethics and Standards</i>	<u>151</u>
Section III The Process of Change	<u>153</u>
<i>The Challenge of Change</i>	<u>153</u>
<i>Role of the Mind</i>	<u>153</u>
<i>Role of the Brain</i>	<u>154</u>
<i>Basic Inquiries for Story Evaluation of Clients</i>	<u>157</u>
<i>The Psychology of Change</i>	<u>161</u>
<i>The Neuroscience of Change</i>	<u>163</u>
<i>Principles of Change</i>	<u>167</u>
<i>12 Basic Principles for Change and Transformation</i>	<u>173</u>
<i>Navigating Transitions</i>	<u>177</u>
<i>Fixed vs. Growth Mindsets</i>	<u>181</u>
<i>How To Mentor Change: 12 Principles</i>	<u>183</u>
Section IV Co-Creating and Sustaining Success with Clients	<u>185</u>
<i>Structure Positive Focus</i>	<u>185</u>
<i>Patterns of New Learning: 4 Phases</i>	<u>187</u>
<i>Strategies To Deal with Change in Challenging Clients</i>	<u>189</u>
<i>Avoid Common Mistakes</i>	<u>193</u>
<i>Possibility Thinking</i>	<u>195</u>
<i>6 Step Action Plan for Achieving Goals</i>	<u>197</u>

16-Step Growth Plan.....	199
Elements of Successful Change: A Summary	201
Supporting Documents	203
Document Examples	203
<i>Sample of Client Information Sheet</i>	<i>203</i>
<i>Example of Client Intake Form.....</i>	<i>204</i>
<i>Professional Coaching Acknowledgement.....</i>	<i>206</i>
Personal Feedback Questionnaire: Building Awareness and Authenticity	207
Compromises Inventory.....	209
Compromises Resolution Schedule	211
Mentor Coach Brand Articulation.....	213
Brand Creation.....	215
Final Brand Statement.....	217
Internal Brand	219
8 Design Steps for Group Coaching	221
9 Design Steps for Facilitating Events	225
Related Articles	227
A Practical Discussion about Features and Benefits.....	227
Information Processing and Communication Facilitation	233
Toward Brain Hardware Optimization	237
Goal Mapping	241
Your Success Map: Mind Over Matters Success Strategies.....	245
Relationship Facilitation	251

<i>Calibrating Intuition</i>	<u>257</u>
<i>How to Turn Your Wisdom Into a Workshop</i>	<u>259</u>
<i>The Answer Is Group Coaching</i>	<u>263</u>
<i>Mentalization: A Theory of Mind</i>	<u>267</u>
<i>The Old Art and New Science of Visualization</i>	<u>271</u>
Client Tools	<u>275</u>



Introduction: Mentor Coaching Definition and Scope

What Is Mentor Coaching?

Mentor Coaches guide others in their personal quests for growth through learning and self-discovery. The Mentor Coach serves as a trusted guide, a catalyst for learning possibilities to help people get from where they are to where they want to be.

In Homer's timeless tale of Odysseus, Mentor was a faithful friend into whose care the world-wandering hero entrusted his son, Telemachus. Mentor's job was to guide the prince's development, while his father was fighting the Trojan War. Telemachus would be the future ruler of the kingdom; it was important that he be prepared.

We have expanded this definition of Mentor as a wise and trusted advisor to include the body of knowledge of professional coaching, with its evolving tools, methods, and principles.

The *focus*, determined by the client, identifies the basic objectives sought.

The *scope* addresses the whole person—mind, body, and spirit—in his or her various leadership roles and performance.

The *process* facilitates collaboration and success strategies to write the next chapter of a business or professional story.

Coaching is a highly focused and powerful process of communication and problem solving. The relationship between a coach and client is collaborative and co-creative to focus entirely on the client's interests, challenges, and goals.

Becoming a successful Mentor Coach requires a synthesis of:

- Honed communication skills
- Commitment to success
- Authenticity
- Discipline
- Integrity
- Business savvy
- Appreciation of human dynamics

The tools, methods, and principles that you are about to learn will be applicable whether you plan to develop an autonomous coaching practice, or whether you plan to use the skills within your existing professional or business context.

Coachable moments with individuals come in many forms. While working with you to build your coaching skills, we will also help you build a framework to understand how to approach the important components of understanding human dynamics, the art and science of change, and building people resources.

The best coaches are guides for those who want to travel new roads in their life or business. Coaching is essentially a process of powerful conversations to catalyze personal and professional growth.





What Constitutes Core Coaching?

We use the term “core” coaching to describe this training program because its intention is to allow the engaged participant to experience, become acquainted with and actually learn to deploy the skills of a Mentor Coach in the application of their professional and even personal lives.

Coaching has been determined to be an excellent tool in guiding change. Organizational and professional leaders often know and are comfortable with their requisite “tools of the trade”. Core coaching is about providing a familiarity with the basis for the flexible use of coaching skills in their leadership and delivery of services to others.

As mentioned earlier in this Introduction, coaching is not new. There are over 100,000 professional coaches focused on being a catalyst for change and growth of their client base. This course is intended to provide you the toolset used by these professionals. The curriculum that follows is grounded in the core of the skill sets that Coach Training Alliance and Dr. David Krueger have used to train thousands of professional life and executive coaches. It takes its guidance from the foundational elements and guiding principles of the [International Coach Federation](#).

What follows are core skills you can use in your coaching to aid your client or mentee with seeding, feeding and growing success and fulfillment. The intention of this course is to allow knowledge to become a developed skill. Studies have shown that actual practice, repetition and an extended time span are critical to transform awareness into valuable knowledge and behavior.





The Art and Science of Coaching

The Art: A Creative Conversation

Mastery and coaching occur by learning to read the flow of the session and respond without trying to shape or control it. It is a dynamic process, always emerging and evolving. Continued awareness of effectiveness combines with experience to shape what works well, and when an approach is shifted or edited.

The art of coaching is solidly based on these premises:

- The coach fully focuses on the client.
- The client willingly engages in coaching.
- The client brings a particular agenda for each session.

When a new client enrolls to work with you, it's an exciting beginning to a fruitful partnership. For the coach, it is an honor to engage deeply with another human being to help them get beyond where they have been, or possibly even beyond where they have imagined.

An example of the art is the use of intuition. Intuition is an awareness that comes other than from evidence or intellectual deduction. It is often an instantaneous formulation that comes from one of the senses—such as a picture that pops into the coach's head, a gut feeling, or a sensation that is often related to the client's dialogue—that is not logical or conscious.

It is a powerful component of coaching, as it comes from being solidly grounded and centered, from having a full awareness of yourself, as well as your client's flow.

With intuition, you receive an impression, a feeling, or a picture before you have consciously processed it, and before you know what to think. It may not make sense at first.

The judgment call is whether to share it with your clients. If you feel that it might be helpful and serve as a catalyst for further exploration, it may be shared, but not with the same valiance as other coaching interventions. For example, it may be introduced in a more tentative, hypothetical way such as, “I have a hunch that I’d like to share with you to see if it might be useful for us to consider.”

Other ways of introducing an intuitive experience is, “I have the sense that...” “I wonder if...”

The Science: A Synthesis of Disciplines

During the last two decades especially, valuable insights into mind, brain, and behavior have come from neuroscience, psychology, quantum physics, molecular biology, and Buddhism. Along with the development of coaching as a profession, the creative synthesis and application of these disciplines with Mentor Coaching provides an innovative new frontier of effectiveness.

Our brains and operating systems are not fixed, but are changeable. We can rewrite mind software and rewire brain hardware to create new stories. In Mentor Coaching, we engage in a collaborative, co-created experience. We are colleagues to understand and focus on the success stories of our clients.

By integrating sciences into the art of Mentor Coaching, we construct a new story with the client. Together we shift:

- From problem to possibility
- From teaching to experiencing
- From telling to listening
- From observer to participant
- From educating to collaborating

Contributions from the Sciences

Contributions from various disciplines can facilitate informed listening and strategic interventions.

- **Empathy:** the listening position from inside the client's experience to understand, as much as possible, the subjective reality of how the client thinks, feels, processes, and constructs meaning. Through our engagement, we teach clients how to be more empathic with themselves.
- **Theory of mind:** the ability to see the world from another person's vantage point, which is essential for constructing a mental model of someone's thoughts and intentions in order to understand behavior and emotions.
- **Neutrality:** remaining equidistant from both sides of a client's dilemma, conflict, or ambivalence – not taking sides, but allowing the client to resolve the dichotomy. We listen without hijacking the agenda, and without providing our own answers to a client's problems.
- **Learn from the old story:** the past teaches the present, so not to repeat the compromised or outdated aspects of the whole story.
- **Foreground issue:** when, for example, an emotion becomes a foreground issue, especially when it derails progress, it must be dealt with first.
- **Beliefs and assumptions:** listen for a belief or assumption that determines present behavior. Collaborate with the client to determine what to enhance, to let go, to avoid, and to change.
- **The intersubjective third:** two people in a relationship create a third entity, the relationship, the co-created third. The relationship has the power to change – to transform. Everything in Mentor Coaching occurs through the relationship.

- **Mindset management:** regulating states of mind and manage emotion is a crucial success strategy. Understanding your own dynamics as a Mentor Coach and the dynamics of others are a significant aspect of achievement.
- **Possibility rather than problem:** positive psychology and emotional intelligence help us to collaboratively focus on possibility rather than problem.
- **Engage the new story:** it is not necessary or even important for someone to return to the origins of a problem in order to overcome it. It is more productive to focus on the architecture of choice in the present moment and move forward.
- **Focus on the solution:** rather than giving energy to the problem, or to understanding the problem, energy focused on the present solution results in more rapid change. Focusing more intensely on problems, as often occurs in therapy or counseling, results in more deeply etching these connections in the brain. A focus on possibilities creates new neural connections.

The brain “lights up” in three distinct areas (increased brain activity as shown on fMRI’s) during “ah-ha” moments in Mentor Coaching. These moments of insight occur from a stimulating conversational environment. When coupled with ongoing structured activity (homework, fieldwork, assignments, reflections, journaling). These insights lead to sustained brain connections and higher levels of functioning.

Level Set: Where your Practice is Present Today

We use the term “practice” with intention. Master Coaches use the same tools and approaches that you will be learning in this course. Repetition and the development of enhanced intuition, along with the tools, methods, and principals in this course, lead to coaching mastery. No coach is ever perfect. Rather, the basic guiding principal is that we are on a journey of growth, and while there may be markers of success that fuel our journey, it is a constant process.

In Yoga, the Master still works on the same poses as the new student. The art and science are found in the practice and application, not the mere knowledge.





Contingent Conversation and Powerful Questions

Productive communication between two people takes place through dialogue – conversations of exchange in which what one says is contingent on what the other just stated. The back and forth dialogue is informed by the Socratic Method taught by Plato in which the philosopher and his students used a dialogue to pursue answers to particular questions. Productive communication between two people takes place through dialogue – conversations of exchange in which what one says is contingent on what the other just stated. In modern times, we often think of the Socratic method in a context of inquisition, as seen in the film *Paper Chase*. Mentor Coaches use the Socratic method of positive, collaborative exploration, not as a test.

The Mentor Coaching process is one of collaborative, contingent conversations. Collaborative: in that both parties make contributions to an ongoing interaction and conversation. Contingent: in that there is no agenda or script, but what each person says is responsive to what the other just said, and vice versa.

Remember that “conversation” is not just the verbal interaction, but also *every* channel of communication, overt and subliminal. All instances are involved, as well as the client’s personality, styles, and ways of processing. (See the article, “Toward Brain Hardware Optimization” in the *Related Articles* section.)

As Mentor Coaches, we work to be grounded, present, and fully attuned to the client. It is this collaboration and contingency that becomes a mainstay of the positive outcome for clients.

We are wired to connect, to bond with others. When we strongly connect with another, the neurochemical oxytocin is released, which is the chemical of connection and bonding. Oxytocin, the chemical that

is highest at the time of its presence to induce childbirth, enhances the experience of connecting intensely with another human being; it is the antitheses of the stress response hormone, cortisol.





Coaching vs. Therapy and Counseling

- Therapists focus on the past.
Coaches focus on the present and immediate future.
- Therapists focus on fixing problems and conflicts.
Coaches co-create solutions.
- Therapists focus on recovering.
Coaches focus on discovering.
- Therapists are professional experts.
Coaches are colleagues and collaborators.
- Therapists focus on ending the old story.
Coaches co-create a new story.
- Therapists focus on trauma and healing.
Coaches focus on goals and succeeding.
- Therapists are required to keep their personal feelings and thoughts removed.
Coaches use personal disclosure as a selective tool to catalyze and challenge their clients.

The goal of psychotherapy is to resolve emotional problems. With patients, a therapist examines conflicted or troubling behavior. Understanding patterns, motivations, and dynamics occupy a central position. Therapy might even try to resolve personality issues.

A Mentor Coach works with emotionally healthy clients to establish strategies and plans, with specific, achievable, measurable goals. Coaching works *with* personality styles as part of the plan. Mentor

Coaching focuses on bridging the gap between where someone is and where he or she wants to be.

A therapist is more an archeologist, whereas a Mentor Coach is more an architect.

Mentor Coaching is for individuals who need to make a change in their behavior in a relatively brief period of time. Clients experience dramatic behavioral changes. An aspect of the coaching process is to co-create internal changes with the clients that match the external changes in order to sustain change.

Mentor Coaching meets needs that people have always had, but offers a new delivery system for mentorship, accountability, partnership, co-creative work, and a sense of possibility.





Coaching vs. Consulting

- Consultants advise their clients about how to solve problems.
Coaches guide their clients to achieve their own solutions.
- Consultants are focused on results.
Coaches are focused on people.
- Consultants are hired to produce a certain outcome.
Coaches are hired to support the client to achieve their desired outcomes.

A consultant's role is to serve as an expert to advise clients about how to solve problems. Consultants typically are experts in a particular aspect of business, and are hired to focus on results to produce certain outcomes.

Physicians, attorneys, certified accountants, and financial professionals exemplify the model of consultant. Expert consultants advise about how to deal with certain problems or outcomes, or even taking over the problems to handle themselves.

The consulting model to advise the client and solve the client's problem is quite different from the collaborative model of the client working with the Mentor Coach to co-creatively address issues to facilitate growth for the client. Mentor Coaching is a way to facilitate collaborative and self-directed success strategies and change from within the client.





Mentor Coaching as a Catalyst for Change

Problem vs. Possibility

All problems have exceptions. Exceptions are the times when problems would have happened but somehow did not. Instead of focusing on the problem, with attention to the details and occurrence of problems, researchers begin to pay attention to how *exceptions* occur. They focused on the details of who, what, where, why and when exceptions occurred instead of problems. The result: changes occur more rapidly.

The energy that is placed into the problem and understanding the problem gets placed into the exception, which is to stay, the solution. When non-problems are created, there is less space in time and energy for problems.

To focus on possibility, we would find out:

- What has worked
- When the client feels calmer
- When the client feels more peaceful
- When the client feels more confident
- When the client has effected mastery
- How the client can conceptualize effective strategies

The Emergence of Mentor Coaching

What has given rise to the emergence of coaching? What needs are these responses to?

Perhaps some of the popularity of professional coaching is the readily understandable language of a coach, speaking of goals, achievement, and attainable possibilities.

The coach can help co-create and hold a vision of what the client can do and be. The coach may be the first person who has totally been dedicated to the client's success and totally believed in him or her.

Whether an individual or organizational level, a client is usually dealing with some transition and is on the verge of an as-yet-invisible breakthrough. The problem of change becomes the possibility of transformation.

The Need for Mentor Coaching

The Lore Institute found that about 80% of large companies use Executive Coaches to develop leadership, enhance emotional intelligence, and ensure success at times of significant transition. Four recent business impact studies (three by the Lore Institute and one by Manchester Consulting) demonstrated an average of a six-fold return on investment for money spent on Executive Coaching.

Google recently studied algorithmically its factors of success of its best leaders. Of eight key factors, coaching stood out as the leading skill set. The American Management Association produced an exhaustive study that validated the outstanding individual and organizational value of coaching.

The confidential collaboration of Mentor Coaching addresses core aspects of performance and growth. Common themes include:

- Maximize performance and emotional rewards
- Enhance financial return
- Expand a career or business story
- Articulate a powerful personal vision that will inspire others
- Navigate major transitions
- Catalyze necessary change and reinvention
- Expand emotional intelligence of people and systems

Some remarkable findings in recent studies emphasize that coaching is a natural response to some of the large changes that are happening in current time.

- 75 to 90% of all visits to primary care physicians are for stress-related complaints or disorders. (UN International Labor Organization study).
- 47% of workers report they have trouble sleeping, and stress has been found the main contributor to this problem.
- 71% of workers are not emotionally engaged in their work (Gallop).
- 70% of healthcare costs stem from preventable diseases. (Center for Disease Control and Prevention)
- Stress contributes to 85% of all medical problems. (Cooper Wellness Program)
- 70-80% of primary care physician visits are for stress-related complaints or disorders. (U.S. Public Health Survey; U.N. International Labor Organization study)
- Stress is the number one reason behind sickness from work. (Gee Publishing Survey)
- Stress undermines work productivity in 9 of 10 companies. (Industrial Society survey)
- Obesity, diabetes, and heart disease have reached epidemic proportions—and almost all are preventable. (American Medical Association)

Individuals from various disciplines including academics, philosophers, poets, coaches, and students of organization change have observed that our existing paradigms have not served us well when the change is badly needed. One of the great secrets in modern commerce is the wide use of coaches by leading CEOs. The Mentor Coach provides these leaders a special set of resources to collaboratively and confidentially strategize, as well as being a unique place that the leader feels “safe.” The trusted coach can provide the safe environ to allow leaders to explore their own changes in an objective and supportive context. Leadership can be a very lonely place. A coach can fill that void and at the same time do so in a manner that brings energy without judgment or competition.

Mentor Coaches experience daily a power of coaching as a valid catalyst in growth, increased awareness, increased connection to a deeper intelligence, and increasing utilization of emotional intelligence. Of all existing modalities, Mentor Coaching is the most effective for this kind of work.

Mentor Coaching is about helping individuals to clarify their purpose, establish their goals, grow, and achieve meaningful outcomes. Great coaching engages all levels of an individual, to help them become aligned, connected, and inspired to their higher self and higher purpose.

The Mentor Coaching model is one of creating the space and the working crucible for breakthrough change. The process of accountability stays with change until new knowledge transforms into new behavior.

People change by creating new experiences that when done consistently, alter neuronal pathways and neurotransmitter patterns. Changing your experience changes both your mind and your brain. Creating a change in behavior must also be coupled with creating a new model to process that change.

Some change occurs from the inside out, from examining and altering thoughts and feelings, with the resultant change in behavior. Some change occurs from the outside in, from creating new experiences with different thoughts and feelings. Each individual usually has a favorite mode of how they work best: from the inside out, or the outside in.

Change in behavior causes change in feelings. And change in feelings can also cause changes of behavior. Change in thinking can cause change in both feeling and behavior.

While having the big picture and overarching goals in mind, Mentor Coaches focus on each session as an entity with a beginning, middle, and end.

Using fitness as an example, the prescription of what is needed for better health is usually fairly evident. The diet and the exercise

are likely within standard norms. The resulting program may not be difficult to articulate. The client's behavior, however, may be challenging to change into a new pattern. Why? Because its dependent on the action of the client. Mentor Coaches guide that change throughout the accountability process to adoption and adaption.





Understanding the Context

While coaching is a co-creative relationship, the client does not operate in a vacuum. The context for the client may include several systems: family, organization, professional group, business or professional office.

Since your client is part of several systems, the contextual framework (the field of play) becomes important in understanding the meaning and foreground for a particular discussion.

The contextual framework is important in these ways:

- What is important in the big picture for that system, its values, purpose, and mission.
- How that big picture impacts your client working to achieve the specific goals of that system.
- How the big picture affects others who the client interacts with in that system.

It is important to understand the contextual framework for the client, and how each system impacts the client, and vice versa. Understanding the context in which a client is focusing goals and strategies becomes as important as understanding the needs and ideals of a client to align with those goals and strategies.

Understanding the specific context for the client does not require you to be a strategic expert, but to inquire enough to have a basic understanding of what is important in the system being discussed. A basic grasp of the big picture includes an appreciation of how goals are

set and measured. This understanding of the environment in which the client is engaging can directly and powerfully impact the discussion of the client's successful navigation within that system.

Understanding the context in which your client is working can take various forms:

- Understanding an organization's mission statement.
- Recognition of the values and needs of a family system.
- Recognizing the structure and organization of the client's business and business model.
- Understanding the human dynamics of the client, as well as those of other key players with whom the client interacts.
- Focus on what the client systematically pays attention to—what they notice, comment on, measure, control, and reward.

With this awareness of a client within a system, and the influence going both directions, you may wonder, either as internal organizer in your listening, or in direct questions to the client:

- What is important in the big picture of this system?
- How does influence and change in the client affect important players in that system?
- How much is the client influenced by other important players?





Section I

Core Coaching Skills

What Is Unique to Mentor Coaching?

Mentor Coaching has its own body of knowledge, with unique tools, methods, and principles. It is a powerful process of communication, collaboration, and problem solving. The relationship between the coach and client is *co-creative* and focuses entirely on the client's interests, challenges and goals.

The application of coaching tools, methods, and principles can take on various forms and configurations. While working with you to build your coaching skills, we will also help you to build a framework to understand how to approach the important components of facilitating success for clients. Think of the coach's role as one of building awareness.

The Mentor Coach serves as a guide to facilitate the client to travel along new paths to reach new goals. The Mentor Coach synthesizes experiences, expertise and training into the special container of the coaching relationship. The co-created results for the client can be powerful and life changing.

Open-ended questions serve as a catalyst to stimulate thinking, uncover beliefs, and invite elaboration. Open-ended questions are useful to focus on possibilities, to explore new ways of thinking rather than to search for an answer. Elaboration of points of view and deeper thoughts result from this co-created collaboration process.

Questions to which the response can be a “yes” or a “no” may bring closure without further exploration.

This process requires the Mentor Coach to be an active listener, to pay attention to:

- What is said
- What is not said
- Attunement to body language
- Listening first and evaluating later
- Interrupting only to ask for clarification
- Clarify or stimulate reflection
- Nudge or challenge to explore further possibilities

The essence of the coaching conversation is that of collaboration, rather than acting as an authority, expert, or consultant. In collaboration, the conversation co-creates a process to move toward the client’s goals.

- Contingent conversation – back and forth dialogue – will bring you and your client movement toward the client’s goals.
- Avoid interpretations or suppositions of someone’s attitudes or motives: what people do is more important than why they do it.
- Open-ended questions generate participation and idea sharing.
- Create a full immersion in the process as a Mentor Coach, with absolute attention to your client.





Coaching from Center

To coach effectively, start from the center of who you are and connect with your client from that authentic place.

This centering involves getting into a state of mind in which you're totally grounded, and able to focus entirely on the conversation with the client and the client's evolving story. This centering of yourself as a Mentor Coach before each session with a client will allow you to focus on the client's state of mind, and help the client achieve a grounding and centeredness that allows access to all of his or her states of mind. For example, if a client is in a state of upset, this state of mind only allows access to a more limited scope of information and processing. The first task is to help the client get centered in order to be able to have access to all states of mind from that centered, search engine capacity, rather than being marooned in a particular software program of an altered state of mind.

Your approach will set the tone and initiate the habits that your clients will model and download throughout the course of your coaching engagement. The results you experience will be a direct reflection of your success with this full engagement with your clients. From this position, you will be able to fully focus on your client's evolving story, and discern the beliefs and ways of thinking of a client, which have direct impact on performance. Your immersion in developing a sustainable growth mindset as well as your coaching expertise will contribute to your significant success as a Mentor Coach.





Creating Value from the Inside Out

The focus and point of reference is always on your client, to understand the client's evolving story, and to revise that story in ways that will generate more effective behavior and a better performance.

This requires you, in your own authenticity, to develop your personal style using these principles. Your work will become your professional story, told in your voice – this is the best model for the client developing his or her own story, in that individual's unique voice.

Your authenticity includes coaching from your center, from the core of who you are. Your value as well as expertise will manifest authentically in this way, and your clients will benefit greatly.

Remember that you do not have to be an expert in a particular area of the client's focus or experience in order to be of help to the client and be a masterful Mentor Coach. In fact, one of the key distinctions of coaching from consulting and therapy is that coaches do not need to be a content experts, to know more than their clients in a particular area. Experience can be of value but it is critical to not allow the coach's experience to color the judgment or decision of the client. Experience may allow a coach to ask more powerful questions or provide the client a sense of understanding to inspire further or deeper exploration. But above any specific knowledge or experience, Mentor Coaching is about listening to and responding to your client, rather than advising or fixing them. Deep listening requires practicing and commitment, not expertise.





Balancing Doing with Being

You can accomplish any endeavor more easily and effectively when you are fully present. Being fully present requires a disciplined self-awareness as a Mentor Coach, void of the distractions of past events, future tasks, and distracting tangents.

Resist the temptation to fix the client’s problem, but instead draw out important details and respectfully support the client to explore the issue, rather than find an answer. Distinguish between the facts of the situation and the client’s interpretation of those facts.

In this process of empathic listening and powerful questioning, the client can move from a fixed focus to become more subjectively aware of her experience, as well as more objectively aware at the same time. Her shift allows her to see things in a different way, with different perspective. The Coach continues to collaborate in this process by questions and contributions to further the client’s exploration.

Coming from the “being” place makes coaching more powerful and the results will more naturally flow.

Balancing doing with being contributes to these shifts:

From:

- “Doing” coaching and performing
- Fixing your client’s problems
- Thinking about what you’re going to say

To:

- Being present with your client (connecting)
- Drawing solutions from the client’s wisdom
- Listening intently to your client

From:

- Struggling to prove or sell your expertise
- Trying to manipulate clients to use you
- Being attached to certain outcomes
- Feeling overwhelmed with the process

To:

- Building a reputation for listening
- Believing the value of what you do
- Being open-minded
- Trusting the process; moving forward

Focusing on the “doing” of coaching and on building your coaching expertise can result in performance anxiety, perfectionism, and doubt about effectiveness with trying to prove yourself. Shift to the “being” allows both you and the client to enjoy the journey, and the client to move forward with a feeling of effectiveness and mastery toward specific goals. When you are comfortable and authentic, your clients will sense this and be more likely to establish their own strong grounding. This will be your clients’ basis for positive change and growth.





Co-Creating the Relationship

Two principles contribute to the dynamic process of Mentor Coaching: *collaboration and co-creation*.

The coach-client relationship is based on *collaboration* of two people, both of whom are dedicated to the success of the client.

The coach-client relationship is *co-created*, in that both parties contribute to the evolving process of deepening understanding, generating success strategies, and specifying plans for the client to proceed.

The Mentor Coach's Role

In addition to being a collaborator and co-creator of the process of the work together, the Mentor Coach also serves as an accountability partner and guide for the coaching process. The Mentor Coach is responsible for:

- Setting appropriate boundaries and policies.
- Eliciting the agenda and goal for each session.
- Listening to the client on multiple levels continually.
- Asking powerful, direct questions.
- Genuinely appreciating, endorsing, and supporting the client.
- Facilitation of the client to set goals, plan, and strategize.

- Offer perspectives, options, and suggestions to raise awareness and catalyze the client's own solutions.
- Making powerful requests to deepen the client's process between sessions.
- Challenging the client to consider or act in new ways to help the client regulate states of mind to achieve an optimum position for collaborative work.

There are things that Mentor Coaches do not do with clients:

- Do the work for the client
- Get invested in what the client does, or any particular outcome
- Take advantage of the client relationship
- Engage in any business or other ventures with the client other than the coach-client relationship
- Diagnose, treat, or fix the client
- Take responsibility for the client's feelings, decisions, actions, or success
- Take credit for the client's success

The Client's Role

In a coaching relationship, clients:

- Supply the agenda, as well as desired takeaway for each session
- Are responsible for their own feelings, decisions, actions, and success
- Tell the truth as they understand it to the coach

- Do their own work
- Show up physically and energetically to the sessions

Clients are highly functioning, healthy individuals who choose to work with a Mentor Coach to make more progress toward their goals and objectives than they would on their own. If a client has the expectation of the Mentor Coach serving as a consultant or advisor, this expectation needs to be addressed and the context converted into the process of collaboration and co-creation.

One of the unique aspects of Mentor Coaching that distinguishes it from consulting, therapy, and counseling, is the initial focus each session on the client's agenda. This establishes ownership of the ensuing process by the client, and a partnership of the client and coach to pursue this objective. Additionally, when the coach elicits the goal of each session—what the client would like to take away from the session—this establishes a success map for the session. The agenda and the successful conclusion, both established by the client, establishes the framework for the client to experience effectiveness and mastery. This experience, as well as the work product, will be self-fulfilling and motivating.

If the context is a coaching group, it is the collaborative decision of the coaching group's agenda that initiates the session.





Responding Intuitively

Intuition is a knowing not formulated from data or intellectual processes. A knowing without knowing why. While listening informs all other skills in coaching, coaching is not just about the questions, answers, and solutions. It is also a pattern of intuitive response: The coach responds to the client, and some of this response can be intuitive.

For example, you may have a flashing image, a word or a name that doesn't necessarily make sense, or a gut feeling. Trust it.

With intuition, you receive an impression before you know what to think. Decide if it would be useful to share with your client. If you do share it, express it with a different valence than other kinds of observations. For example, "I have a hunch that I'd like to share with you to see if it's useful for us to consider." "I have the sense that..." "I wonder if..."

Intuition is most accessible when the coach is fully grounded and present, centered in order to have full access to a full range of experience and states of mind.

See Supporting Documents for "Calibrating Intuition"





A Context for Mentoring Change

Certain human needs are universal and remain present throughout adulthood: attachment, effectiveness, validation, support, and intellectual stimulation. These needs have even more valence with increased demands, and at a time of change.

Many prescriptions for change ignite discomfort with the old story or even resolve an old story, yet fail to offer ways to develop a successful new story. Professional Coaching and Mentoring meets needs that people have always had, while offering a new delivery system for mentorship, accountability, partnership, co-creative work, and a sense of possibility.

A Mentor Coach helps people write the next chapters in their lives or business stories: what's next, how to get there, and how to succeed at what happens after what happens next. The ticket to entry in coaching is desire, not trauma or failure. The Mentor Coach is a confidential collaborator for aligning vision with needs and values, for a strategic pursuit of goals.

Neutrality

In Psychoanalysis, neutrality means staying equidistant from either side of the patient's conflict. By gaining understanding of both sides, the patient can own the generation of each side, and the possibility of choosing not to create conflict, or of finding some resolution at another level. The anorexic, for example, offers a model to instruct us on neutrality. Any hint or inkling that the therapist wants her to gain weight and get out of danger results in opposition—an absolute refusal to eat—rendering the therapist as ineffective as all other previous family and caregivers combined. The conflict becomes externalized: she hands

over to the family and therapist the desire to get better, and she takes the other side, the familiar “no.” By remaining neutral, the therapist helps her feel her own push and pull, the wish and the fear of her own autonomy—and to understand how food enters into the expression of this conflict (rather than being the problem itself). She can then own both sides of her conflict and fashion a different story for self-growth.

Mentor Coaches practice neutrality by asking powerful questions without taking the position of trying to fix or ghostwrite their clients’ lives. If the Mentor Coach tries to fix or solve a problem, she hijacks the client’s agenda. The fastest way to foreclose understanding is premature action. If either Mentor Coach or client simply picks a side of a conflict or a dilemma to act on it, the illusion of resolution is created. And it forestalls both understanding and a true resolution.

Neutrality is to be equidistant between components of a conflict or dilemma, not knowing what the answer will be, not having a need for it to go one way or another, and knowing that there are many truths to tell without being invested in whichever is most salient at this moment.

Yet the Mentor Coach is not neutral in a particular way. In an alliance to co-create effectiveness and success, the Mentor Coach holds the vision of what the client can do and be. In so doing, *the Mentor Coach may be the first person in the client’s life who is totally dedicated to the client’s success.*

Empathy

All signifiers of personal meaning and construction (reality, relationship, experience, perception) carry the unspoken foundation question: From whose point of view? This is what empathy is primarily about, to resonate with another’s experience and reflect that understanding out loud, establishing a common ground.

Empathy is placing ourselves in the inner world of another person without getting lost there. Empathy describes a listening perspective positioned inside the experience and point of view of another, to resonate with and understand that person’s subjective reality, his

or her entire mental state. Empathy is not sympathy, consolation, gratification, or commiseration. Empathy describes a point of reference, a particular attunement to another's internal and external systems and that person's model to perceive and process. Losing oneself in another is the antithesis of empathy. Likewise, codependency obfuscates empathy, as it requires not seeing all of someone—such as being in love with who someone could be rather than with who the person really is.

Accurate empathy, being attuned to the entire subjective reality of another individual, even requires attunement to what that person is omitting, sticking up for an aspect of someone not being given sufficient oxygen for awareness or activation, seeing beyond the problem, focusing on what to look for—and toward. In coaching, the task is to believe in the client's capacity to generate solutions and strategies.

Remarkable similarities of background, style, or mental model between two people may appear as attunement, yet an overlap of parallel experience may masquerade as empathy, which can preclude it. Likewise, significant differences of background, culture, or psychic models of assimilating and registering experiences may require focused attention to construct an empathic bridge. In either case of exceptional similarity or disparity, unspoken assumptions may create an impasse. Any categorical assignment reduces the other real person to a projection of one's own assumption.

Insight

Insight and understanding alone do not replace old lived experiences and generate a new story. A new lived experience is required, one that repeats until it etches new neuronal pathways and new neural networks to become the new default mode. When new brain circuits are etched with the impressions of new experiences, some gene expression is altered in the neural network by producing different cellular protein, as was found in remarkable research by Eric Kandel.

Martin Seligman asked, “What really makes people happy?” Seligman’s research on positive psychology and authentic happiness indicates that positivity can be taught; it is strengthening, but must be actively practiced. The focus on positive growth and mutual enhancement, rather than on analysis of problems, self-reinforces.

Seligman sees the difference between optimists and pessimists as a fundamentally different explanatory style.

- The pessimist attributes negative events to stable and global factors. Bad events are pervasive, uncontrollable, and permanent.
- The optimist scans for possibility for self or business enhancement. Bad events are local, temporary, and changeable.

The basic interactions of early development, including mutual affirmation, recognition, responsiveness, empathy, and positive support are the same fundamental aspects of the coaching relationship. Coaching facilitates effectiveness and mastery from the application of these principles.

Underlying causes are always present for any problem—often complex, multi-determined causes. But a coaching approach uses underlying causes only as information, since the causes themselves do not prevent effective behavior. When someone moves toward a goal, problems seem to dissolve. When someone fills the space with present experience, there is no room for past experience. With full engagement in moving ahead, there is no energy left over to create internal obstacles or to collude with external ones.

Jung stated, “Some problems cannot be solved. They have to be outlived.”





Communication and Connection

4 Maxims of Communication

1. The person who makes a difference in your life is the one who listens as if he or she always knew who you are, and gives it all back to you.

Each relationship combines two individual stories to coauthor a new relationship story. The implicit contracts authored by each party in a relationship become unspoken assumptions that can facilitate or derail the relationship. Making explicit the hidden assumptions and implicit expectations becomes a crucial part of communication. To see the point of view of the other and to communicate that understanding, each must respect the other's point of view. Understanding and respect are not synonymous with agreement.

2. Ultimate freedom is not to relying on someone else's response to determine how you feel about yourself.

Ineffectiveness of communication, simply feeling that what you said was not heard or registered by the other, may produce irritation or anger. Then the content of the discussion becomes more intense. The process that initiated the derailment - feeling invalidated - gets lost. The simple step of repeating to the other what you heard him or her say prior to making your own point validates listening. You are then in a position to be heard more successfully. Your individual responsibility to co-author a mutually satisfying relationship includes the following:

- Mutual commitment to respect for the other's needs and wants without neglecting your own
- Facilitation of communication

- Mutual negotiation on different points of view
- Explicit awareness of implicit assumptions
- Acknowledgement and understanding of needs and wants made obvious by relationship symptoms

3. The greatest vulnerability is daring to risk your fullest experience.

4. The greatest satisfaction is risking your fullest, most committed experience.

4 Steps of Communication

Much of the difficulty in relationships comes from one of two areas: assuming you can change someone else's behavior or attitude, and faulty communication.

A basic human desire is to connect with another. The power within a relationship is not a decision, but a commitment at a heart level. Communication is a significant basic component in any business or personal relationship.

1. Reflect back to the speaker what you heard him or her say.

This simple step assures the speaker of effectiveness - of being heard. If you're poised with a response rather than listening and reflecting, the first speaker may feel a need to repeat; both speakers are then vulnerable to escalation of emotional tone.

In any relationship each person's perspective is different. It is important that each sees the other's point of view and avoids hijacking the other's agenda. The unspoken resolution may be some variation of, "I see your point of view, and I have mine, and yours does not take over mine, though perhaps you would wish it would, just as I would wish that my point of view would take over yours." Knowing and respecting each other's point of view is the initial phase of a satisfying mutual, equal collaboration.

2. Clarify by asking the next question.

Socrates taught us that really smart people ask questions rather than give answers. The detail may contain the feeling and the important aspects that otherwise would have to be assumed.

3. Understand the context.

The context of any statement or meaning includes time, location, and system.

Understanding the contextual framework of the speaker becomes crucial in understanding both communication and meaning. An illustration is the “fishbowl effect.” Within any system or relationship, we live within the fishbowl of our fellow “fish.” We share a common experience and setting--the fishbowl. In this environment, we see clearly, even comfortably. But then someone within the fishbowl must interact with the outside world to grow and succeed. When we look to the outside from within the bowl, the glass distorts. “Being in the bowl” changes the lenses through which we see the world. This distortion is not obvious or measurable, as it is highly subjective.

Each person in a relationship as well as in a system or organization is “in the bowl” which creates a unique perspective both in looking out, as well as when someone else looks in. The glass (our lens) changes our view of what is going on outside the bowl, an invisible distortion unless we are aware of this process.

The Mentor Coach asks questions and highlights the awareness of the client to help understand both subjective and objective perspectives. To understand the context in which a client is working includes, for example, the meaning of any situation, including time, location, and system.

4. Listen between the lines.

For someone who listens for facts, that filter will mean that the person stops listening when the speaker stops giving facts. When a very

intelligent person listens for information, the communicator, in order to hold the listener's attention, must interweave information with the newness of what is being said. The speaker's empathic attunement to the listener includes creating a listening environment while providing information without losing the listener's attention.

Listen literally and closely to what someone says, and you will pick up constant clues about what is wanted and needed. Truth as well as reality is perception.





Recognize Active vs. Passive Positions

Sometimes the story seems to write itself, to just happen to you.

- “My thoughts ran away from me.”
- “It just seems to keep happening.”
- “I wasn’t myself.”
- “Uncertainty crept in.”

Statements like these illustrate that a passive mindset predominates, one that denies or *doesn’t recognize responsibility for thoughts, feelings, or actions*. *When this mindset exists, you then seem the unwitting recipient of the experience, with little hope that something can be learned, or different choices made.*

Rather than managing, overcoming, countering, or medicating a feeling such as anxiety, the first step is to acknowledge that even though it seemed to “just happen,” you generated the experience.

When you take responsibility, you activate your capacity for change. Once you understand the major internal themes, you can begin to resolve the conflicts. That may include releasing long held anger or resentments. When you have completed some of this “house cleaning”, you can then focus on creating new and different feelings, responses, and behaviors. The clearer you become about your old stories, the more freedom you have to reframe your life and reinterpret the events in ways that empower instead of cripple you.

Remember that active versus passive positions occur within a contextual framework for the client. Understanding that context helps provide meaning and application. Examples include internal factors

such as knowing the needs and values of a client, matched with the active process of determining goals and strategies. The particular contextual framework or “field of play” becomes necessary to understand in order to best implement the client’s goals.





Effective Conversations

Communicate from a base of empathy.

Each person has a distinct point of view. Communication is not the triumph of one viewpoint over another. It is the establishment of a common ground for understanding different points of view, in order to create a mutual, collaborative agreement or plan.

Requiring that someone else respond to you in one particular way renders that person and their response inauthentic.

Developing empathy with another is predicated on first doing so with yourself. If you are not genuinely aware of how you are experiencing the world, you cannot become accurately aware of another person's perspective. Empathy is a way of listening to yourself or to another person with resonance of an entire experience of feeling, thinking, perceiving and behaving.

Another term for this is *rapport*. Rapport derives from the old French word *rapporter*, meaning to *bring back* or *carry back*. Establishing rapport with another is to travel into that person's sphere, to step into their shoes, and bring back a sense of who they are and how they are experiencing the world.

Seek to understand—not to change.

Much of the difficulty in relationships comes from our thinking we can change someone else's behavior or attitude. The only person you can change is you. The impulse to change another's behavior usually springs from some dissatisfaction in an aspect of ourselves.

Seeking to have another person live an unexpressed part of yourself can be both unsatisfying and addictive. Attempting to change someone else's personality, attitude, style or mode of processing won't work, and will only derail the process.

What someone believes is more important than what they know. Learn your partner's belief system, because these assumptions drive behavior and filter what is heard.

Clarify the focus and agenda.

A large corporation's executive team huddled around a tape recorder, listening to the most recent presentation by their company's CEO. They played the recording, rewound it and played it again, and again, and yet again. A junior office walked in and saw them all sitting around the machine, looks of bewilderment on their faces. She asked them what was going on.

In his speech, they explained, the CEO had indicated that the organization should "embrace more color." They each had a different idea about what he had meant by this directive: a change in dress? Or in racial makeup? Perhaps, in office decor, in language, in marketing message, in their logo and letterhead? They were combing through the speech, parsing each word, looking for clues as to what the CEO had in mind.

"Has any of you picked up the phone and asked him?" she asked.

No one had thought of that.

Reflect back what you hear.

When discussing an emotionally charged subject such as money, reflect back to the other person what you hear them saying before responding with your own thoughts and feelings. This reflection insures that you correctly registered what was said, and more importantly, what was *meant*, and it also provides the other party the opportunity to clarify their own expression, if necessary.

It also communicates your sense of respect and regard for the other person: it says that before launching into your point of view, you want to make sure that you have correctly grasped theirs. And by the way, this has the happy fringe benefit of better positioning your partner to then hear your point of view.

Listen to self-statements.

Yogi Berra once said, “You can see a lot by watching.” You can also hear a lot by listening. The truth is always conspiring to assemble itself before us, if we will just get ourselves out of the way and pay attention. We are always communicating, and there are many languages; some even use words.

Feeling invisible to another creates a unique sense of being eclipsed, the pain of not being seen by another. Eclipsing is when one body in the solar system passes in front of another, rendering it invisible, as if it disappears. People do this, too. While eclipsing may masquerade as rivalry or jealousy, it is significantly more powerful.

Listen literally and closely to what someone says, and you will see constant clues about what is wanted and needed. Truth and reality are perception.

Acknowledge the different roles you each have adopted.

No two people are alike, and no two halves of a relationship are identical. Be aware of the distinct roles you have each taken on within your relationship. These may reflect your gender, your differing income levels, your differing skills or native abilities around money (e.g., perhaps one of you is naturally better organized and more easily handles bills), differing roles in child rearing, and so on.

Acknowledging these roles doesn't mean they are fixed or immutable; it simply means being clear about how you've agreed, implicitly or explicitly, to function together at this point. If you want to change

that, you can discuss it; if you're happy with how it is, the "don't fix what ain't broke" principle may apply. In any case, it's impossible to genuinely assess how your distinct roles are working when they live in the murky realm of the assumed and unexplored. Talk about it.

An example is to acknowledge the income, personality, and work differences of you and your spouse. Each has implications for the balance of power in your relationship. There are almost always differences; don't ignore them.

Be aware too of the rules, stated or unstated, by which male and female roles are chosen and rewarded in the family, and of such jobs as who makes decisions, who handles financial matters, and who handles the daily matters of life, including household, children and chores. Clarify how each of you is validated or invalidated, empowered or eroded in areas of work and money.

When communication breaks down, step up.

Everyone fails to empathize with another at times. Despite our best intentions, we mess up. We're only human. Most important in a relationship is the repair of such an empathic rupture, because then true understanding can occur. At times the most important thing may not be what you have done, but what you do after what you have done.

When an important relationship is derailed by communication lapse or unintended thoughtlessness, it's often useful to set aside an attachment to being "right." To forgive another is to free yourself.





Self-Statements

Self-statements are the unique, personal communication of experience and point of view we each have. In coaching, the client will re-create with you the process that she does in her life and in her business. The client will always *show* you—not just tell you—exactly what it is like to be her. Careful observation and understanding of this process can be immensely helpful. For example, the client reproduces in the coaching relationship the resistance and fear to taking a particular action. By creating an obstacle that logically makes sense, she experiences the same frustration that has in her office. She thwarts your best efforts at dealing with her “resistance.” You become frustrated as well. She even states, “You seem frustrated.”

This frustration is the client’s self-statement: her experience of the push and pull in the process with you. She is showing you exactly what her experience is through re-creating it and the process with you. She is doing the best job she can to demonstrate to you what she needs help with.

Rather than taking it personally, or responding to the frustration, recognize that it is the client’s self-statement of her own experience. Use this to illuminate the steps leading to stuckness and frustration, in order to strategize a better way.

Another example of an application of this concept of self-statement is this quote from Eric Hoffer, who was much attuned to smart little brothers who have bigger brothers. “You can discover what your enemy fears most by observing the means he uses to frighten you.”

Everything you say and do is a self-statement. Even when it is about someone else. Experience is not encountered, observed, or predetermined, but actively constructed. Your narrative reflects the

assumptions and self-concepts you have about yourself. You are the author of your entire experience. You choose what you engage, what you create, and what you do not create. You actively choose your emotions as well as the assumptions generating those emotions.

The reciprocal to acknowledging that everything you say is a self-statement: to recognize that *everyone else only makes self-statements*. All you can ever do is share your own experience of someone else; you can never tell them what they think, how they feel, or what they should do. If you do not take personally what someone says about you, and recognize it simply as their own self-statement, you will not be hurt by what they say. It is a particular freedom you grant yourself to refuse to take personally what others say. (Of course, it is almost impossible not to take certain things personally.)

As a coach, self-statements provide ongoing windows to the client's perceptions and experiences. Once the working alliance is built, both coach and client can use these revelations to significant benefit.





Point of Reference and Locus of Authority

To the extent that you focus on the responses of others, and leave out your own subjective experience, you abandon yourself. If you rely on others for your needs you may create a dependency that deprives you of the pleasure of effectiveness and mastery. And compliments never help if you don't believe them. To become the hero of your own story requires establishing an internal ideal and living up to it—being your own authority.

The self is the set of personal stories developed in the mind. The mind, invisibly formed by the brain, is inherently subjective and private. The self composes a plot of interwoven themes and storylines, more or less cohesive, as a consistent identity. The self, our greatest necessary creation, exists as a composite illusion, an idea but not a fiction.

We create a composite sense of self from a system of selves along complex neuronal networks, those designer assemblies of brain cells for experiences and interactions. This self—and all the unique qualities that self prefixes—esteem, confidence, initiative, identity—is personally authored. Being written daily, this, too, can undergo transformation.

Awareness of being the author of your own actions with an accompanying sense of effectiveness and mastery is only one component of creating your own story. Thoughts, feelings, sensations, and entire affect states may seem much more elusive to own.

Goals and ideals require a formulation of a concept of future time. When you fully establish and positively validate your self, esteem and confidence allow continuity planning a positive and expansive future landscape.

The particular moments that collectively comprise our lives, seeming unsummoned and individually indistinct, nonetheless compose the story of our lives. We may not fully comprehend these incidents at the time, and only later gain more understanding. These building blocks of moments of meaning are about being real and human, bounded and grounded, but not limited.

A new story recasts the past and the present as it layers new experiences internally and relationally alongside the old experiences to create a new meaning. Past, present, and future are current constructions. A new narrative can make sense of both the past and the present in a coherent way, allowing full potential and capacity to come to life. Reflection on the plot of your life and the assumptions underlying various motivations allows scrutiny as to which storylines work and which ones do not. The ones that work don't need fixing; the ones that don't work can be fully focused to see their adaptiveness in a prior context, then brought to the present and revised.

Leading indicators from clients include:

External Authority Phrases

Pressure words reveal an external point of reference, assuming an external authority.

- Should
- Have to
- Need to
- Must

Limitation Words

- Cannot
- Impossible
- Should not
- Something stopped me





Passive Position to Active Intention

We author the stories that then seem to shape our lives. Like so many other processes in our lives, we inadvertently reverse cause and effect. The feeling we originate may then seem to target its creator: “My anger made me respond in a foolish way.” In dreams, as with symptoms, cause and effect interchange: The author of the dream and the creator of the symptom behave as if what they made is instead happening to them. It is as if the story takes over its writer.

As coaches, we help clients discern meaning as well as understand the internal context—their frame of reference. The frame determines the meaning attached, and can even determine a state of mind. Someone has a setback, disappointment, or crisis. Rather than continuing to focus on the upsetting issue and negative energy, we reframe the situation by asking a question: “What’s the opportunity here?” Problem to possibility. When someone completes their list of options or runs out of possibilities, we nudge, “What else?”

A passive position can disown a feeling, thought, or action as an active creation. This passivity can mask personal initiative. So rather than managing, overcoming, or medicating a feeling such as anxiety, the first step is to acknowledge that even though it seemed to “just happen,” the client generates the experience. When the client takes this ownership, you can collaboratively examine the meaning the client attaches.

Until beliefs are addressed, internal change and behavioral change will not occur. Beliefs can either limit or facilitate change. We have an attachment to hang onto things the way they are, meaning to continue without change the way we are.

Various language content and patterns reveal underlying assumptions about the map, the plot of your story. These assumptions may facilitate or impede progress. Language reveals internal versus external point of reference, internal versus external authority, active versus passive position.

Passive Positions

- *The feeling took over*
- *Anger gripped me*
- *Doubt crept into my mind*
- *The impulse seized me*
- *A part of me resisted working*
- *I came to an impasse*
- *Suicide entered my mind*
- *My mind played tricks on me*
- *I found myself doing that*

To challenge a client's belief

Consider the following questions:

- *What could you do if this assumption were not in place?*
- *Have you discovered this belief is not true*
- *What belief would serve you better?*
- *What can you shift that belief to?*
- *Is this limiting belief holding you back?*
- *Have you outgrown this belief?*

Creating and writing your own story involve recognizing that the story has not been ghostwritten from the past, as if someone or something (parents, critical others, fate) were handing you the lines in a script.

We structure our language around belief systems. For example, a cause-effect belief is that if something causes this, then the result will be this. For example, "I have to do all of these things before I can actually begin." Or, "If I do this for him, then surely he will want to do this for

me.” The most extreme cause-effect dilemma was from a mother of a boyhood friend, who told him, “You can’t go into the water before you know how to swim.”

An example of the coupling of two unrelated things can become, “I won’t do this because I don’t have the experience,” or “I will do this after I lose twenty pounds,” or “I’ll enjoy myself when I retire/get my life in order/do these tasks.” These language patterns are evidence of a limiting belief.

When a belief is in place, to its creator it seems logical. The belief, “If I go forward, then something bad will happen,” would make it appear foolish to continue. Beliefs that may have served us well at a different time, such as earlier in life, in adolescence or childhood, may simply no longer work or may be outdated, tailor-made for an earlier context but no longer a good fit.

We create a belief system of assumptions that we see as reality. When others do not live up to our assumptions, we are disappointed. The assumptions, however, are usually unstated, and part of the assumption is that the other person will just know what we expect without our having to say. When a significant and important person does not live up to our expectation, the result may be hurt, with the hurt quickly countered by anger. We often assume that we share the same beliefs, plans, and assumptions with a significant other—that our partner sees things as we do. Our assumption may be that if someone loves us or respects us, they will do what we want. We may assume that others think and feel, perceive and attribute significance just as we do.

Internal positions often polarize around active or passive. Indications of the passive position reveal themselves in language of being the subject of one’s decision or feelings: “This happens to me,” or “My anger got the best of me,” or “My anxiety stopped me.” This language indicates the belief that you’re the victim of the feelings that you generate. Anger is not there until it is created. A feeling is a verb. The anxiety that stops you is the feeling that you create in stopping yourself. The horse needs to go before the cart.

In numerous ways, you can perceive yourself as the subject rather than the agent of thought, feeling, and behavior. Passivity is a very determined activity. Forgetting is as active a process as remembering. Doing nothing is a specific work product. Disclaimed action (a slip of the tongue, being late, various accidents) is meaningful intended action; its importance is validated by the double engagement of creating it and refuting it.





Section II

Core Coaching Principles and Tools

Effective Coaching Tools

In coaching, the tools of the trade are all innate abilities. Your talents, skills, experience, professional and business experience all are synthesized into the specification application for Mentor Coaching. When combined with the powerful tools and principles of coaching, your experience and expertise will become a powerful and effective means to help clients transform themselves.

The essential tools of coaching include:

- Listening deeply to your clients.
- Asking powerful questions.
- Responding intuitively
- Setting up strong support systems

As you develop each of these skills, your personal style of Mentor Coaching will emerge. When you develop your professional coaching story and voice, you will best be able to help your clients develop their own stories told in their unique voice.

With a growth mindset and the appreciation of learning, each time you coach, you will increase your mastery. Every coaching session you give strengthen your coaching abilities.

Listening is the cornerstone of coaching.

Powerful, deep listening informs the coaching process. Through listening, you can ask direct questions born out of your curiosity. You can respond contingently to what your clients say as well as what they don't say.

The most powerful and important thing a coach can offer a client is the gift of being fully heard. Remember the last time that you felt that you were deeply listened to, heard, and understood.

Coaching is more about connecting than performing. The client brings the agenda, and has both the privilege and the obligation of deciding the topic of discussion, and what to take away from the session. It is important that the coach not hijack the agenda, but remain loyal to the client's purpose and focus for each session.

Resist the temptation to come to conclusions or to prematurely plan action before the client has spoken and developed the conversation fully. Resist the impulse to jump in and problem solve or advise.

Listening deeply is about *being* with your client. When your client perceives that you are listening, you have earned trust. With that trust, coaching will be more effective.





Developing Your Unique Voice As a Coach

The coach's voice has a powerful impact on the client. Voice simply refers to your natural and authentic way of speaking and writing. With questions especially, be aware of the aspects of your voice:

Your Energy

Check your own energy before you coach. Be certain that you are grounded and centered before initiating a session with a client. This regulation of your own internal state of mind will be necessary for you to have the full range and scope of access to your information. It will also serve as a model for the client to download as part of the process.

Your Tone

As a coach, use a neutral, friendly, engaging, yet professional tone with clients. By maintaining a neutral position, you avoid a judgmental, pejorative tone, as well as a condescending or patronizing tone.

Your Voice Pace and Rhythm

Be aware of your vocal pace and rhythm. Usually it is effective to match the pace and rhythm of your client's. At times if your client has exceptionally low energy, or is energized or anxious, it may be useful to modulate these extremes by being very focused on being centered yourself. If this does not work fairly quickly, and if the client is in an

extreme state, it may be beneficial to ask if spending a minute to go through a brief relaxation exercise might be helpful in order to better utilize the coaching session.

Your Vocal Inflection

Be aware of how you can modulate and regulate your voice, especially inflections, to both hold attention and convey engagement. It may be helpful to record your voice in order to objectively listen to it and keep inflections at a minimum.

So that your client can hear you clearly and not be distracted, recording yourself as you coach can objectify the resonance and qualities of your voice, as well as the quality of your telephone system. Your voice can be your best asset in coaching—or a big detriment. Treat your voice as a musician treats his instrument. Especially if you work by telephone, that will be the essential medium of exchange.





Two Dynamic Coaching Equations

Beliefs » Behavior » Performance

Beliefs drive behavior. Behavior drives performance.

If someone experiences compromised performance, examine the antecedent: the behavior. The specific behaviors that lead to a compromise can then be specifically addressed. If behaviors that are ineffective or problematic persist, examine the antecedent: the belief.

From an infinite sea of possibilities, our beliefs determine what we see, and how we process it. Our beliefs are our collection of software packages to determine what we input, and then how we process it.

We believe and remember that which fits our plot. What we expect to happen in the present reveals instantly our experience in the past. Information is absorbed, filtered, and organized by our belief system.

We don't see things as they are – we see things as we are. We see what we believe, and we're always right, because we write the story.

Empowering beliefs include:

- I can make the money I need
- I will find a way to love my work
- I will create new possibilities

Limiting beliefs also influence reality and behavior. Some examples include:

- I can't find time to exercise
- I don't have enough experience
- My opinion doesn't matter.

Event + Response = Outcome

Every outcome you experience in life is the result of how you respond to an event in your life. Achievement is an outcome; it is the result of responding in particular ways. It's not what happens to us but our response to what happens to us that makes the difference.

If you don't like the outcomes you're experiencing, there are two things to focus on: the Event or the Response. A focus on the Event can blame external factors. "Sorry I'm late, the traffic on I-10 was terrible." "The assembly instructions didn't make sense."

You can focus also on the Response. You can change your response to the events to get the outcome you want.





What To Listen For

There are five reference points for listening in Mentor Coaching sessions:

- **Choosing the Destination**
Where does the client want to go?
- **What Defines Success for the Client for this Session**
What specifically does the client want to take away from this session?
- **Listening for Obstacles**
What obstacles does the client construct and what limiting beliefs are in place that need to be highlighted and examined?
- **Shrink the Change and Clarify the Decision**
What is the most direct, simple, and specific route to get to where the client wants to go?
- **Change and Transition**
How is the client's perspective changed, and what is the client committed to do as a next best action?

Helping the client recognize the changes that he's made is a step toward internalizing the change to make it permanent – a shift in the client's basic model used and ultimately of the client's identity.

In this collaboration, a natural flow will develop in which the client will either discover or create solutions, often beyond what was imagined.

Specifying the agenda and determining what the client wants to take away from the session distinguishes coaching from all other professional engagements. The client has established a map for effectiveness in determining the agenda and the desired outcome; the result will be the experience and model of mastery.

If the agenda is not crystal-clear to you, further specify and ask questions until you fully understand what the client wants. This is a crucial step in the beginning of the coaching session. Proceed into the session only when you have full clarity yourself and have co-created with the client the specific focus and the desired outcome.

When the client requests a brainstorming session – for both of you to creatively think about a particular issue – this is also a legitimate agenda. The client has circumscribed the specific focus – the process of brainstorming.





Delivering Powerful Questions

Listening carefully and asking powerful questions are a powerful combination in coaching. By asking powerful questions, the Mentor Coach:

- Directs the flow of the session
- Gathers useful data
- Develops rapport
- Facilitates a growth mindset
- Stimulates insight

It is the coach's responsibility to keep the session moving in a useful direction. Asking questions enables the coach to facilitate the session to continually explore who the client is, what the client wants, and what both can do to co-creatively achieve the client's focus. The client's answers tell the coach where to go next with the coaching.

When a coach asks a meaningful question in response to something the client has said, the client feels heard; rapport builds between the coach and client.

Simple, well-placed questions will:

- Open a closed system for the client – stimulate the client's mind
- Shift from problem to possibility
- Focus less on “how to” and stuckness, toward new ideas and approaches
- Move the client from automatic reaction and responses into a creative, synthetic mode
- Allow the client to become more subjectively aware and more objectively aware to facilitate growth

The more powerful the question asked, the fewer questions are needed. Our role is not to interview our clients, or to fire questions, but to connect and guide them to their own wisdom, insights, and solutions.

Coaching uses the process of appreciative inquiry to draw a client out and move toward the client's objectives.

By assuming that the best solutions can be generated from the client, the coach can reflect the client's own wisdom and ability. By deep listening combined with questions, the coach can help the client move to new insight and new possibilities.

The context is on the choice architecture of the present moment: to help the client make the most informed, best choice possible at this moment. Aspects of the past, understanding motivation, and exploring origins of past problems and emotions are not the focus of coaching. We use all aspects of emotion, the past, and previous problems as information to guide effective choices in present time.



Five Types of Questions

Different situations require different kinds of questions. Some questions uncover details, some draw out emotional. Some regulate or draw out emotional states. Some prompt a client into action. Some challenge or provoke to have the client look deeper.

1. Probing—Use this type when gathering information.

“What is the ‘it’ you just referred to?”

“What happened then?”

“How did that make you feel?”

“How are you thinking about that to come to that conclusion?”

2. Challenging—To get the client to address resistance or to accept responsibility.

“Is that really in your best interest?”

“What happened to your commitment to this?”

“At the instant you decided to abandon your commitment, what was your internal conversation?”

“What are you feeling attached to you right now?”

3. Inquiry—To activate the client to brainstorm or to reflect for a future session.

“Could you be playing a bigger game?”

“Are you working in a role you value?”

“At what percent of your capacity are you functioning right now?”

“What would bring you closer to what you want right now?”

4. Strategic—For later in the session to help your client create an action plan and next steps.

“What is your next step?”

“When will you have that done?”

“How much time will you devote to that?”

“When will you commit to complete that goal?”

5. Leading—Rarely used, is closed and requires a specific answer.

“Can you do better at that?”

“Do you see how futile that is?”

“How are you feeling right now as you’re discussing this?”





Open-Ended Questions Who? What? When? Where? How?

The most effective type of question to use in coaching is an open-ended question that begins with Who, What, When, Where, or How (or could be rephrased that way). Take a look at these questions. Notice how each one is simple and direct.

- » Who do you need to be to reach this goal?
- » Who will you ask to help you with this?
- » What do you want to take away from coaching today?
- » What would you like to have happen now?
- » What is your immediate goal or objective?
- » What are you willing to change in order to achieve it?
- » What is missing for you right now?
- » What new skills, attitudes or knowledge do you need to succeed and grow in this situation?
- » When will you make that call?
- » When will you feel you have enough?
- » Where do you feel stuck?
- » Where is your focus now?
- » How do you want to proceed from here?
- » How did that feel when you said that?
- » How much is it costing you to keep that up?
- » How would you like to be coached around this issue?

Why Not Why?

Rarely is it useful to use a *why* question in coaching. Why do you think that is? It's because *why* can have an accusatory or defensive tone. Why questions often focus the client on the problem at hand, rather than solutions. *Why is it so hard to get past this point?* We suggest you train yourself away from using why questions. As you gain experience, you may find the perfect timing for an occasional *why* question. Otherwise, stick with Who, What, When, Where and How.

Open-Ended versus Closed-Ended Questions

A closed-ended question is one that encourages a short or single-word answer such as yes or no. Most people tend to use closed questions much more than open-ended questions, perhaps because the closed question keeps control of the dialog with the questioner.

An open-ended question turns over control of the dialog, and encourages a full, meaningful answer from the respondent's own perspective. Open-ended questions allow for a spontaneous, unstructured response -- which makes them far more useful in coaching.

Occasionally, you'll use a closed-ended question to punctuate something for your client. But, aim for open-ended questions because they will draw out more details, and more surprises, from your client.

- » *Do you get along with your manager?*
is better asked this way...
Tell me about your relationship with your manager.

- » *Are you complete with the session?*
is better asked this way...
Where did you find value in this session?





A Summary of Listening as Mentor Coaches

As Mentor Coaches, become accustomed to listening to a story without trying to fix it.

- » First, put your ego in a blind trust. (Don't take it personally).
- » Listen to the language, whether active or passive.
- » Listen to the point of reference, whether internal or external
- » Listen to the source of authority, whether self or other
- » Listen for the initiation of action, whether proactive or reactive
- » Listen for how centered the speaker is in his or her experience
- » Listen for the state of mind of the speaker, and whether the state of mind is regulated + fits the task
- » Listen for self-reference in the first or second person.





The Basic Mentor Coaching Model

Mentoring a client's growth story involves some essential components of Professional Coaching.

The Coaching framework creates the space and the working crucible for breakthrough change. The process of accountability supports change until new knowledge transforms into new behavior.

A five-step basic Coaching model provides the structure for each individual Coaching session. It may also be useful to consider this model in other interactions and venues, including a self-guided journey.

1. Specify the client's agenda

- The specific issue(s) the client wants to focus on in this session
- The details/story of the issue
- What specifically the client wants to accomplish in the session

What would you like us to focus on this session? Or, What would you like us to accomplish in our time today?

The client determines the agenda for each session:

- a. Listen deeply and consistently to the client.*
- b. Respond appropriately to what the client says and to his or her energy.*
- c. Serve the client's agenda through each question and statement.*

The Mentor Coach listens closely to the client's exact words, the feel of the words in voice and energy, what the client wants from the session, and potential underlying agendas. The verbal exchange is only

a part of the interaction. Knowingly or unknowingly, the client always communicates emotional experience. The emotional message may or may not be the same as the verbal message.

This key element of Coaching places responsibility for determining the agenda of each session squarely on the client. The Coach will persist until a focus is achieved, even if a client is resistant. Clients are responsible for their own feelings, decisions, and actions. And their success is theirs.

Contrast this method with dynamic psychotherapy and psychoanalysis, in which the patient is encouraged to “Say anything and everything that comes to mind.” In this stream-of-consciousness mode, focusing and preplanning represents resistance.

2. Determine useful intervention moments.

The intervention moment is the engagement to explore a specific aspect at the center of the client’s topic. It is often the “ah ha” of the Mentor Coach about some aspect needing illumination or mutual exploration.

- a. Use intuition about what the client has conveyed to discern the most useful intervention moment.*
- b. Facilitate the client’s shift by asking open-ended direct questions. Let’s look at how you see this as a problem. Help me understand how you’re thinking about that to come to that conclusion?*
- c. Thoroughly explore the most useful timing for a powerful shift for the client.*
- d. Listen for the impact of your questions and statements land and make adjustments as needed.*

Coaching interventions are the essence of the session. Several potential approaches can be taken with a client to discover how the client may shift in order to take action. Indications for these interventions may come in subtle clues such as the following:

- *Obvious stuckness*
- *Missing pieces in the story*
- *Inconsistent statements*

- *Strong or weak energy*
- *Nervous laughter*
- *Sudden, strong, or contradictory emotions*
- *Assumptions or limited perspectives*
- *Throwaway comments*

The old story intersects with the new story at the moment when the client recognizes a need to change and is ready to take that step.

3. Shift the perspective

The shift of perspective is a point of insight, or awareness by the client.

“How can we look at this in another way? Have you seen this before? How did you handle it before that worked the best?”

This model works as a process for achieving goals because it catalyzes change. Once an agenda is clear and one or more Coaching interventions have been explored, the Coach invites the client to shift or move beyond the stuck place and towards possibility thinking. The shift must occur in the client, not dictated by the Coach. It is counterproductive to lock onto a solution and push for it before the client is ready. Hijacking the client’s agenda will usually fail, because there is no impetus from the client. Clients need to see and experience from their own perspective before they can proceed on their own path.

The Mentor Coach invites the client to look at a problem in a new way, or encourages possibility thinking. The shift invitation may come in the form of a challenge, a nudge, a suggestion, a new perspective, or simply questioning how the client’s thinking led to his or her conclusion.

4. Frame the session

After the client’s shift is acknowledged, the Mentor Coach may explore commitment, or encourage the client to put new awareness into action that would further the goal.

The culmination of each coaching session is to reach an agreement about the next steps that the client will commit to in the following week prior to the next session.

A formal, stated action plan by the client allows both coach and client to know exactly what the client's commitment is, and how success will be measured. Both parties are clearly and specifically focused on the success map for that week.

- a. Acknowledge the shift the client has just made.
- b. Check the client's commitment to moving forward.
- c. Request action from the client. "What actions are you taking away from the session? What accomplishment if done this week would result in significant improvement? Are you willing to do it"?
- d. Have the client specify a time frame for the intention.

5. Follow up

A key role for a Mentor Coach is that of accountability partner. In the subsequent session, as a coach you are an accountability partner. This means that you have jotted down the client's commitments from the previous session, and if the client does not mention what he or she has done regarding those commitments, it is your obligation to check in. A follow up for the client's commitments of things to accomplish between sessions builds in accountability and continuity with the overall mission.





Strategic Goal Pursuit

SMART Goals

Goals are exciting and energizing. They make it easier to focus, and make it clearer when distractions occur. SMART goals co-create moving ahead and specifically hone strategies.

SMART goals include these components:

- **Specific.** Be very specific about a goal—e.g., “getting fit” is not a goal but an outcome.
- **Measurable.** A way to track efforts and sustain energy and motivation.
- **Achievable.** The goal must be attainable.
- **Realistic.** Make sure you are willing to pay the price of your goal.
- **Time-bound.** There needs to be a beginning and an end—time-framed.

Initiatives

For each goal, establish three key initiatives move toward that goal.

Next Best Action

For each initiative, decide on the next best action.

Application

People with repetitive behavior have spent time understanding an old story, or focused on old behaviors and patterns. But understanding and

further analysis aren't enough to bring about change. These individuals need a new story to be in before they can give up an old one.

So, beginning a session with questions such as, "What are your goals for this session?" Or, "What would you like for us to get done today?" focuses on the immediate.

Setting specific goals enhances motivation. Establishing strategies enhances focus.

This is also a model for the outside world: Setting a next-step goal, and having a strategy to reach it. Setting long-term goals, such as saving for retirement and emergencies, can replace the default pattern of spending everything earned.





Fulfilling the Client's Agenda

Three things must be fully present for artful coaching to take place:

1. The coach is fully focused on the client.
2. The client is willing to be coached.
3. The client has brought a particular agenda for this session.

If any piece goes missing, the possibility for masterful coaching diminishes. If any piece is weak, the coaching will likely be weak. When each piece is strong, coaching can be transformational!

When you engage a new client, it is an exciting beginning to a potentially long term and fruitful partnership. Some clients may stay with you for years. Your client has made a commitment to invest into their growth. They anticipate great change and accomplishment of big goals. For you, it is an honor to engage deeply with another human being. There is the promise of more experience, engagements and credibility.

Being Right Sized

Every bright and positive thing has a shadow side. Being aware of the shadow side of coaching will help you stay in a healthy co-creative relationship with your client.

Sometimes, a strange thing happens in a coaching relationship. The coach becomes inflated in their role and/or the client never fully assumes their role. Feeling uncertain of the breadth or limits of

the coaching process, the client hesitates. Be alert for this kind of imbalance. It can cause trouble.

For the best result, always consciously establish the co-creative relationship when you begin with a new client. Make it clear what you do and don't do as a coach. Make it clear what they are to do as the client. Setting these expectations from the beginning is critical to establishing a good coach/client relationship.

At any time, if you realize that you've not been clear about this, correct it immediately by having a conversation with your client. Make sure the co-creative relationship is clear before you continue.

When you are just getting started as a coach, it is natural to be nervous and to feel a bit wobbly. Notice if:

- » You are nervous during sessions.
- » You feel the need to perform for your client.
- » You are anxious to solve problems and to prove your value.
- » You tolerate your client's lack of a clear agenda, or chronic lateness to sessions.
- » You feel drained after sessions.

All of these are symptoms that you are taking on more responsibility than is rightly yours.

You are responsible for you and for monitoring the relationship. Be careful not to take on your client's responsibilities as well. Your client is responsible for his or her own feelings, solutions, actions and progress.

If your client...

- » Is not bringing a well-formed agenda to most sessions.
- » Misses or shows up chronically late to sessions.
- » Doesn't fully engage in sessions.
- » Expects you to have the answers and solve their problems.
- » Doesn't tell the truth as they know it in sessions.

...bring these things to your client's attention respectfully. Review the coach and client roles if necessary. Most clients will begin to understand and step fully into their role if you track the relationship and make subtle adjustments.

As coach, it's your responsibility to monitor the "health" and integrity of your coaching relationship. It will not work for you to inflate your role or for your client to avoid stepping into the appropriate client role. If the roles remain unbalanced, the only ethical choice is to terminate the relationship.

The Blank Canvas

Once you've set up the "container" for the co-creative relationship, it's time for your client to begin the process of transformation and create something new in their life. Provide a blank canvas for each session and encourage them to wield the brush through your questions and reflection.

We've talked about being blank. You've learned to quiet your mind in sessions so you can listen to your client. Now it is time to **learn how to leave *your agenda* behind completely.**

Tell tale signs that your agenda has crept into the session:

- » After reading your client's session prep form, you plan what you'll say in the session.
- » Your suggestion or observation doesn't land with the client and you can't let it go.
- » Your focus is primarily on what you are going to do or say next.
- » You feel judgmental towards your client.
- » You think you know what is better for your client than they do.
- » You fill the time with your own opinions, perspectives, and stories.
- » You make your client wrong.

As soon as you notice any of these, take a moment and a breath. Let go of your position. **Become blank again.**

Your judgments, biases, opinions, perspectives, stories, assumptions and interpretations may or may not have relevance in the session. If you decide to share them with your client, do so lightly. Consciously, open up your mind and allow your client to have his or her own way, his or her own perspective and choices.

If you notice that you have come on too strong and are attached to your client seeing it your way, come back to holding the client's agenda. It might be best to own up to your mistake with your client. They will respect you for it and it will clear the air between you.

Hijacking the Agenda

The client's agenda is the guideline for the session. It empowers both the client and the coach by providing a pinpointed focus for the conversation. If the client's agenda isn't clear or the coach does not fully serve the agenda, sessions tend to ramble, feel more like therapy than coaching, and are often not very effective.

You cannot hold your client's agenda and yours at the same time. If you let go of the client's agenda and bring in yours instead, the session will spiral downward. That is called "hijacking" the agenda.

Here's an example of hijacking a client's agenda:

Client: I don't feel like working on my business plan today even though I said that was my agenda on my prep form. **I've had a great realization come to me and I want to tell you about it.**

Coach: Okay, let's start there.

Client: I just moved offices for my new role. . It's feeling so real all of a sudden that I'm doing this. I know that I've made all the right choices for myself around this new job. I've been working really

hard on transforming myself and I've watched myself become who I want to be over the last year. I'm ready for this challenge!

Coach: It's fun to hear your excitement. I've enjoyed witnessing your transformation.

Client: I also feel humbled by this new role. . It's so wild. I don't always know what I'm doing. I feel like sometimes I'm just dangling in the wind. There's something really liberating about that, but it's also frightening.

Coach: I think if you focused on your accountabilities you'd have some direction and it wouldn't seem so frightening. [AGENDA HIJACKED]

Client: No, really, I feel exhilarated by the risk I'm taking. I've recognized the value of being in this new role. .

Coach: That's great but don't go too long without focusing on your accountabilities in the role.

Notice how the coach's comment about the accountabilities of the role made the client defensive. The client's agenda was never fully stated or clarified. The coach had not heard enough details or found out what the client wants to take away from this session. Instead, this coach gracefully pushed what she thought should be the client's agenda at her. The client's energy was in a different place. The coach began by listening, but then made the client wrong.

Don't be too eager to get to solutions and action with your clients if they're not there yet, and certainly not at the beginning of the session before the agenda is clarified. Stay with the energy of the moment.

Explore without manipulating.

Here's a different outcome to the same conversation:

Client:...There's something really liberating about that, but it's also frightening.

Coach: Sometimes those feelings go hand in hand.

Client: Yes. I'm learning that it's part of being in a new role - taking risks so I can have a high return on my investment of time and energy.

Coach: Excellent! If you can acknowledge and move through those feelings into action, you'll build your way to success in your new role. Do you know what you'd like to take away from this conversation today?

Client: What's most important to me right now is to process my realizations out loud and not focus on anything pragmatic today. I trust my inspiration will lead into action.

Coach: Great. Tell me more.

This time the coach encouraged the client and made her point without being a killjoy or hijacking the agenda. She endorsed the client's self-discovery and let her have a simple agenda - to process out loud.

Clarifying the Client's Agenda

The client's agenda is more than just the topic of discussion for the session. The client's agenda **includes the details surrounding the topic and what the client wants to take away** from the session.

The first phase of your coaching session is about setting the stage. You may be tempted to rush through this part to get into more dynamic coaching, but don't. Make sure their agenda is clear before you proceed.

As your client begins to share what is on their mind, listen closely for the key points that compose their agenda:

- » The *specific topic* they want to explore in this session.
- » Any important *details* about the topic.
- » What exactly they want to *take away* from this session. This may be a shift in perspective, solutions or next steps.

Ask open-ended questions until the agenda is clear to you. Also take note of:

- » The client's **exact words** about their topic.
- » The feel of the words in their voice and **energy**.
- » Potential other or *underlying* agendas.

If you are listening closely, the client will usually tell you exactly what they want out of the session in the first 1 - 5 minutes of the session. If you don't hear it, it's critical to ask: "*What would you like to take away from this session?*"

Client: I've got a big writing assignment in my new job and I'm still developing a project for the other department I've been working for. That project is not going to be done for a while. It feels like I've got one foot in my past and one foot in my future. I feel scattered. Maybe I need to develop a better scheduling system, learn how to divide my day up differently.

You might think it's best to start coaching around the scheduling system. But the client's statement "I've got one foot in my past and one foot in my future" indicates a potential perspective shift the client may need first, before she can move into pragmatic solutions. It's an opportunity to help the client connect her previous work with her new work.

Coach: When you said you have one foot in the past and one in the future, I think you've hit the nail on the head. Would it help you to build a bridge between the two projects?

Client: Yes! I'd love to find a way to relate them.

Coach: Are there common factors in the projects that would allow you to leverage your work?

Client: Well, they are both writing projects for marketing to social services organizations and I have complete control over the topics... You know what I could do? I could make the topics the same for both projects. Then I could write each piece from a different angle!

Coach: Great idea. I imagine your expertise will grow a lot from working those projects that way. Would you like to brainstorm more about this?

Often the client will not state their agenda plainly. “My agenda for today is...” Instead, they will let you in on what they’ve been thinking, what’s been getting in their way. If you do not understand exactly the topic that the client is bringing to you or what they want to achieve in the session, ask questions until it’s crystal clear.

Here is an agenda that needs more clarification:

Client: I’ve got a dilemma that I want to resolve in our conversation. I’d like to move into a new role within the next year. I’m not well suited to my job here in this department. I’ve been asking myself: Do I stay in a job I hate for two more years or find a new job and hope that it will be the right move for me? I’m certainly marketable with my skill set. But high-level positions in the company are few and far between.

While the client clearly stated his takeaway and the topic, the details of this agenda are a bit tangled up. What can the coach glean from the client’s presentation of his agenda so far?

- » He says he has a **dilemma** he wants to solve in this session.
- » He wants to make the move within the next year. He’s considering *only two options*: stay in this job or find a new job with the hope that it will work out.
- » He says he **hates his job** because he’s not well suited to it

It’s time to probe for more information until the agenda is clear. There are several ways to do this. Here are two:

Coach: I hear that you want to make the move within a year with the hope that it will all work out. What’s the reason for making the move this year?

Coach: What other options might there be, besides staying with your department or finding another that may not be exactly what you're looking for?

The Tip of the Iceberg

Sometimes the agenda presented is only the most visible surface of a larger or more relevant agenda. Explore this with your client by encouraging them to look below the surface. Be casual about this. You're helping them test the waters, not forcing their head under. They always have choice.

Client: I'd like to talk about time management today. [TOPIC BUT NOT NECESSARILY THE AGENDA.] I'm feeling really behind on this new project.

Coach: What's going on?

Client: I'm so bored. There's just no juice for me in this. Every time I sit down to work on it something else distracts me. Like today, when I was supposed to be writing an update, I just kept checking my email and voice mail, wasting time.

Coach: What are you avoiding?

Client: I don't know.

Coach: (waits in silence)

Client: I guess I'm avoiding the next step of this project.

Coach: What happens in the next step?

Client: I'm supposed to give a report to the team. I'm not ready to do that and I'm way behind deadline. I'll have to face my team manager. I don't even feel qualified to do this. I feel resentful that he gave it to me in the first place!

Coach: (pause)

Client: I didn't realize I was so angry about this. I've needed some additional help since the get go and I haven't asked for it.

Coach: It's great that you've realized that now. What would you really like to get out of this session today?

If the coach had misunderstood the topic of time management for a clear agenda, he might have jumped immediately into strategizing with the client and missed the underlying agenda.

The coach's direct question: "What are you avoiding?" helped this session cut to the chase. When a client says, "I don't know", they usually do know. Give them the space to express the truth. In this case, the coach's well-timed silence calls the client to say more, uncovering the real issue.

The agenda is the starting place in every session. Without a clear agenda to guide the session, it will meander aimlessly. Masterful coaches take the time to fully clarify the agenda before moving into the coachable moment.





Seizing the Coachable Agenda

During or after clarification of the client’s agenda, “coachable moments” begin to emerge in the conversation. This is the place in the session where dynamic coaching begins.

A coachable moment is where the coach has an intuitive “aha” about what’s at the center of the client’s agenda and checks that inkling with the client. No doubt that in some of the previous dialogues you could sense the best direction to go in that conversation.

Coachable moments are potential roads to travel with the client towards their destination. **The intended outcome of exploring coachable moments is to help the client shift perspective relating to their agenda.**

Coachable moments are not the point in the session to strategize or decide next steps. That comes later.

The coach’s job is to notice these potential roads to explore and initiate a timely investigation into one or several as needed and as time allows. **Not all coachable moments are equal in importance.** Begin by probing about the *most useful* or the *most urgent* point. To be a masterful coach, “seize” the best one and explore that first.

Nine Subtle Clues

Your client is continuously providing you with clues on how to coach them. That’s why it’s so important to listen closely and stay present with your client during sessions. These clues are often subtle comments that sound different from other things said, almost as if they are highlighted in your awareness.

Coachable moments present themselves as opportunities for powerful coaching. The first clues appear in the agenda itself. And then more clues emerge as the session progresses.

Here are nine types of subtle clues to the coachable moment:

1. Offbeat or repeated words and phrases.
2. Missing pieces in the story.
3. Strong or weak energy.
4. Inconsistent statements.
5. Nervous laughter or sighs.
6. Sudden, strong or contradictory emotions.
7. Assumptions, interpretations, limited perspectives.
8. Inflation of roles.
9. Throw-away comments.

Offbeat or Repeated Words and Phrases

Sometimes you'll hear your client say something that seems a bit strange. It's often something valuable to explore. Also, they may repeat words or phrases that indicate a coachable moment.

Coach: How are you?

Client: I'm fine. For the purpose of this session, I'm fine anyway. Maybe a bit stuck. It looks bad on me that nothing is getting done... You know, it's like you're unable to get into a good state of mind. It's about how others perceive you. I'm behind on projects. I am struggling to keep up. My staff is starting to question my sanity in taking on more work.

Coach: For this moment, put other people's perceptions and feelings aside how do you feel about this situation?

Client: I feel like I'm buried alive in obligations and I just keep taking on more!

This client kept repeating, “I’m fine” when it was obvious she didn’t feel that way. Also, her speech lapsed into second person, which often indicates an opportunity to become more self-aware. Now the coach can ask the client what she wants without her being muddled by interpretations of what others think.

Missing Pieces in the Story

Often, when something is missing from your client’s story, it’s also missing from their awareness. They might be disregarding something or not wanting to face a certain critical piece of information. It’s not the coach’s job to force the client to deal with it. But it is the coach’s job to check it out with the client.

You’ll remember we shared part of this dialogue before. The first missing piece to explore is the reason why the client believes he has to wait a year to find his new role.

Client: I’ve got a dilemma that I want to resolve in our conversation. I’d like to find a new job where there are great opportunities, but I won’t be ready for another year. I’m not well suited to my job here in this department. I’ve been asking myself: Do I stay in this job I hate or find a new job now? I’m certainly marketable with my skill set. But high-level positions in the company are few and far between.

Coach: I have a sense of your dilemma. Now let’s fill in the details. You mentioned that you’d like to make a move into a new role. Tell me what considerations went into deciding to wait another year?

Client: I figured with the experience in my field I would be credible enough to make a lateral move now.

Coach: How many years have you worked in hospital admin so far?

Client: Going on eight now. I just feel a decade is a significant body of experience. It will have an impact on my ability to be successful at the next level.

Coach: Eight years. That's significant. Let's look at something else for a minute. I want you to rate your passion for me. From 1 to 10, with 10 being highest, what's your level of passion for making a move to a higher-level role.

Client: Oh, it's a 10! I love the idea of having an impact on strategic planning and improving health care facilities is something I've got a real knack for.

Coach: Is it possible eight years is pretty hefty tenure already?

Client: Ten would be better.

Coach: Is there something I don't know about the hospital industry that makes ten years the magic number?

Client: No. It's just a bias I have.

Coach: That bias may be the only thing keeping you from moving on your plans more quickly. What would it be like to dump the bias, make your move to a higher-level role now ?

Client:...I could do it. I guess ten years was an arbitrary goal I set for myself a long time ago and I've just been doing the time. Some changes that I'm working in right now have me wanting out of this scene as soon as possible. I'd have to get my act together, but I could do it.

Coach: Would it help to talk through a transition plan that's more timely?

Client: This really changes the picture...I COULD move on my plans sooner. I've just had this arbitrary number in the way. Yeah, let's work on that transition plan!

Sometimes, uncovering the missing pieces magically unlocks the client's mind about their issue and decisions are more easily made.

Strong or Weak Energy

If you hear breathlessness, an unusual pace in your client's speech, or if you sense intense energy, take note of it. If it doesn't smooth out in the first few minutes of the session, point it out to your client. You might even suggest that they take a moment to become fully present.

If energy is low, note that as well. Coaching requires that both you and your client have sufficient energy for the session. If either of you can't bring that energy into the session, it might be best to postpone. Ask your client to take a few deep breaths, brighten their voice and raise their energy a bit. Do this yourself and you'll help your client arrive.

Coach: Susan, I noticed you are talking very quickly and seem breathless. How about taking a moment to fully arrive? Take a few breaths and talk more slowly.

-OR-

Coach: John, your energy seems a bit low. What's going on?

Client: Oh, really? (Already brightening his voice and energy.) I didn't realize.

Coach: You sound back to yourself already. Thank you for raising your energy. That will help us explore your topic for today.

Bringing your client's awareness to their voice or their energy will often dramatically change the way they are showing up as well as their state of mind. You can also suggest they adjust their posture, open up their shoulders, and sit up taller. That will often shift their energy and allow more to flow through them. It might be the very thing that will make coaching possible or give them the juice to take more action.

Inconsistent Statements

If you hear a client say something that doesn't fit with something else they've said, make a non-judgmental comment or ask a question that points that out.

Client: I'm ticked off that my boss didn't tell me what was going on. He doesn't seem to have any integrity. I try to operate from my personal values at work. It's not okay for him not to be straight with me! I don't know. If I talk to him about it, I'm afraid I'll appear too confrontational.

Coach: Tell me about your personal values.

Client: Integrity. Being honest and up front with people, giving them the benefit of the doubt.

Coach: I think I heard you say that you didn't want to bring this issue to your boss because you don't want to appear confrontational. Does that support your personal values of being honest and up front with people?

Client: I see your point. So you think I should talk to him about this?

Coach: If your intention is to operate from your values, I support you in doing whatever allows you to do that. What do you think?

First, the coach gave this client some time to rant without interruption. The coach's silence gives the client impetus to go into more depth.

It would have been so easy for the coach to step over this coachable moment and agree with the client - "yes, you don't want to be confrontational". Instead, the coach didn't let this client wiggle away from being at his best. He showed his client another opportunity to operate from his values.

Essentially, the coach just held up a mirror to help the client see the way he was being, contrasted with the way he wants to be. Mirroring is transformational because it allows the client to see himself or herself from the observer place.

Nervous Laughter or Sighs

Little audible sounds are similar to body language. Usually they indicate that there's more to what's being said than what the words convey alone. It's a clue for the coach to listen closely and possibly ask the client about the sound.

Client: I'm in this unexpected situation. My sister was laid off from her job a year ago and hasn't been able to find another job. She and my ten-year-old niece want to stay with us while she gets back on her feet. I really want to help my sister. I just don't know how this works (giggle). It is impacting my work and I don't how to approach this arrangement.

Coach: Have you determined exactly how you want to support your sister?

Client: I think I should let her stay with us. It's just that I just don't want to offend her with a lot of rules. (giggle)

Coach: Put aside your concern about offending her for the moment. What arrangement would suit YOU best while also providing the support you want to give your sister?

Client: I'd prefer to give her a limited time frame where we're willing to let her live rent free and set up specific responsibilities that both she and her daughter would have in the house.

Coach: You sound very strong and clear. What specific boundaries do you want to establish with your sister?

The nervous giggle seemed to be saying that this client really did know what arrangement she wanted to make, she just felt sheepish about it and needed some support in setting boundaries that would suit her.

Another approach would be:

Coach: You laughed a little when you said: "I just don't know how this works." What's that giggle about?

Pointing out the sound often helps the client realize where they are stuck and gets them rolling on to their own solution quickly.

Sudden, Strong or Contradictory Emotions

Just because a client occasionally breaks into tears or raises their voice doesn't mean you need to stop the coaching and refer them to a therapist. Don't be afraid of your client's tears and strong emotions. Only chronic or unmovable emotions are a cause for concern.

Strong emotions are often just a discharge of energy that precedes a time of meaningful action.

Take care not to step over emotions and go on as if you didn't hear them. On the other hand, **limit your empathetic response.**

- » Slightly slow your voice.
- » Show understanding and compassion.
- » Keep your boundaries.
- » And encourage your client to let their emotions move.
- » Give them time and space to feel through their emotions.

Coach: (With a slightly softer and slower voice) I hear that you feel strongly about that. It's okay to let your tears flow. (Followed by silence until the client is ready to speak.)

When you let your clients have their tears or a rant, they often come out the other side with clarity and new vitality.

Assumptions, Interpretations, Limited Perspectives

Every one of us has assumptions and interpretations that limit us and keep us stuck. When you notice this in your client, provide them with another way to look at things. Your point of view doesn't have to be the right one for your client. **All you are trying to do is awaken their mind to new perspectives.** Once their mind is open, they'll be on their own way.

Client: I don't seem to be marketing our product in a way that I can manage. It feels bad making all these calls to people for lunches. I guess I just don't understand how this is done.

Coach: What have you done to market the product so far?

Client: Oh, you know, we've sent out direct mail pieces to these three mailing lists inviting people to sample our services. Now, I need to follow up by phone. It's incredibly difficult to get anywhere with these people.

Coach: Are these "cold" leads?

Client: Cold? I don't know them, if that's what you mean.

Coach: Exactly. Cold leads are people you've never connected with before. I can imagine that cold calling is very unsatisfying. Have you considered offering your services to people you've met already or making connections with new people in another way first?

Client: I've never done that because I didn't want to impose on anyone.

Coach: Have you ever had the experience of having a conversation with someone and you find out they offer a service that you need or want?

Client: Yes.

Coach: Describe what happened.

Client: Well, a few weeks ago I happened to meet a general contractor at the hardware store. We got to talking as we were waiting and when I heard that he was a contractor, I asked for his card because I wanted to do some renovation on my house. But, I didn't feel any obligation because he wasn't trying to sell me anything...Oh, I get it! So I can just make a connection with people first, and then let them know what I do?

Coach: Exactly! That's a warm lead. It's a much more satisfying and effective way to market. And later, it will be easier to create a relationship of trust first and they'll be interested in connecting with you further. What are some ways you can get the product in front of lots of people and get to know them right now?

There were two separate and progressive coachable moments in the dialogue above. One showed up in the agenda when the client said he felt bad making calls and he didn't know how it was done. The client had a limited concept of how to market. The coach asked probing questions to be certain that was the issue.

Later the client said he felt that offering a sample of his services to someone he knows would be imposing. The coach helped the client to see it another way, and the client was able to move forward.

Role Inflation

Often when an individual takes on a new job or position, they inflate that role. There's the perspective that "it's all up to me now." They forget about support systems and resources, and begin a pattern of stress. It's a lonely place to be, and it stops progress in its tracks. As a new coach, you may be able to relate to this.

Client: I've just taken on this new board position in a non-profit company. I regret volunteering for this. I've got to clean up years of neglect! I feel like I'll never have enough time to get everything done that needs to be done. I want to discuss how I can get it all done.

Coach: What's your position on the board?

Client: I'm the program chair. There's been nothing done in the way of long term planning. We have no speaker contracts. There's no list of leads. Nobody has surveyed the members for their interests. As far as I can see no one has ever given this any attention.

Coach: I get the picture. First, I want to invite you to let go of your perception that no one has ever given this role any attention. My guess is every previous program chair felt just like you do. It's a big deal to take on a volunteer position on a board. Everyone did the best that they could do. With that approach, could you take some pressure off you too?

Client: That's a good point. I'm sure you're right. In fact, I've already seen evidence that the person before me was very savvy but she, just like me, she was a volunteer for this position.

Coach: Exactly. It's good to put it into perspective. Now, what actions do you CHOOSE to undertake with the time and resources that you have available?

Client: This is good. I just need to decide what I'm willing to do, right? Okay. I'm going to ask the volunteer coordinator to put together a survey team and get ideas from the members. I'll oversee it, but I won't do it all myself. Then, I'll ask that team to develop a simple speaker's contract.

Coach: That's really smart and you're 100% clear about what's first. No one has to reinvent the wheel here. Are there some similar organizations that might be willing to share their contract template, surveys - those sorts of things?

The coach's job here is to gently bring the client back to "right size". She asked the client to stop the blame game and make room for possibility thinking. Then, the coach asked her to be at choice about her contributions on the board. The coach also helped the client to see that she does not have to do it all alone. Empowered, the client naturally moved into her own solutions.

Throw-Away Comments

Throw-away comments are dismissed words or phrases, hurried through or muttered under the breath. Train yourself to hear these as if they were spoken loudly and clearly. They often point to the coachable moment.

Client: All my life I've vacillated about my career. My wife says I could wallpaper my house with all of my business cards. I've always been a job hopper. . But, I think it's time I grew up. I get excited about something new and quickly decide that's my new job...I don't know what I'm doing or where I'm going.

Coach: You just said you thought it was time you grew up. What did you mean by that?

Client: Well, it's time to find a job that I value and stick with it .

Coach: Really? What makes you think that?

Client: That I've got too many interests. There's no one thing I'm known for.

Coach: I get it. So, before we move forward, can you tell me what you'd like to take away from this session?

Client: A more grown up direction for my career that I can enjoy and that will satisfy my need to learn new things. .

Coach: I hear you. Let's take a look at what you're doing now first. Is that okay with you?

Client: Sure.

Coach: Tell me, how are you feeling satisfied by your life and job now?

Client: Well, I'm doing well financially. That's not a problem. I have lots of different interests and like the idea of getting up each day and doing something that I really value. . It's a little overwhelming sometimes but I need variety or I'll get bored.

Coach: So, you enjoy what you do and you're doing well financially. You like your lifestyle and the freedom to choose what you're focused on everyday. What's not grown up about that?

Client: It seems more grown up to always being trying to improve myself by changing jobs and moving forward financially.

Coach: Hmm. Tell me, where is that idea coming from?

The throw away comment often points to what's missing for the client. If the coach hears the dismissed point and repeats it back to the client, more useful information emerges. Then, the coach helps to slowly unwrap the skewed logic that the client has bound himself with. When that's undone, the coach can investigate with the client how to gain the sense of belonging he's looking for.





Success Insurance for Completing Goals

Goal setting, especially the proper tools to strategically structure progress, is crucial for long-term achievement. The usual problem, however, is not setting goals but completing them.

Goals and strategy require management and dedication.

The section entitled “A Review of Research on Goal Setting” (Goldsmith, M., and Lyons, L., Eds. *Coaching for Leadership*, Volume II, Wiley, 2005) helps us understand two essential components: Why people give up on goals, and how effective goal setting can help ensure long-term achievement. Six of the most important reasons people give up on goals—and the inverse is *success insurance*:

- **Ownership.** People must “buy in” to their goals and take ownership. This shifts the ownership and initiative to an internal point of reference. Then, effectiveness and mastery can come about.
- **Time.** Goal-setters tend to underestimate the time it will take to complete the task (an “optimism bias”), a habit that leads to giving up.
- **Difficulty.** Along with the factor of time, the optimism bias applies equally to difficulty.
- **Distractions.** People tend to underestimate potential distractions and competing goals.
- **Rewards.** Disappointment sets in when achievement of a goal doesn’t translate into other goals or to the desired happiness.
- **Maintenance.** Maintaining changed behavior is difficult, and there is always the pull of the old and the fear of the new.





11 Steps To Ignite Change

- Have needs and values in sharp focus.
- Know what you do uniquely well.
- Assess specific strengths, passions, and weaknesses.
- Establish SMART goals: Specific, Measurable, Achievable, Relevant, Time-Bound (timetable: 30-90 days).
- Determine 3 Key Initiatives to take for each goal (timetable: 1 week).
- Decide on the Next Best Action for each initiative (timetable: 1 day).
- Structure a strategy to reach and stretch each goal.
- Increase tolerance of planned risk with associated fear.
- Focus on specific results, action, and momentum regarding goals.
- Continue assessment of disciplined activity with refinement of goals.
- Endorse your progress.





Basic Tenets of Mentor Coaching

1. The client is adaptive and creative.
2. The focus of Coaching is on possibilities rather than problems.
3. The results of Coaching center on the presence of solutions rather than the absence of problems.
4. The agenda comes from the client, not the Coach.
5. The map of the Coaching journey is co-designed by questions: “Where are you now? Where do you want to get to? How do we measure progress along the way?”
6. The client has—or creates—the answers.
7. The Coach asks powerful questions that assume nothing other than a belief in the client.
8. The Coach is an accountability partner, keeping the client focused on an agenda with the mission of furthering the client’s goals.
9. The Coach does many things: Questions, clarifies, encourages, mentors, teaches, inspires, brainstorms, and challenges.
10. The emphasis on Coaching is on now and next: The present and the future.
11. The Coach collaborates in writing the next chapter of the client’s life or business story.
12. The client is oriented to mastery and wants to succeed.





Choice Architecture

Choice architecture is the determination of informed choice, and the recognition that each moment's choice is actively determined. Choice architecture involves the recognition that clients write their own story, own it, can assess, and decide the choice generated each moment. Mentor Coaching collaborates with clients to help them make the most informed choice possible each moment. Choice architecture helps someone understand how the mind and brain work in order to create optimum maps, paradigms, and wise choices. Informed, strategic choice can then result.

Self-awareness includes an individual's external world, the internal world of mind/emotion/spirit and how someone connects to others.

A client can benefit from attunement to these choices:

- Develop awareness of what you engage and create.
- Observe the patterns of where and how you spend your energy.
- Assess what does and doesn't enhance you in the transactions of paying your time and energy.
- Recognize what is within your power, and what is not. When your head and your gut both agree, you'll never go wrong.
- Is all of you going in the same direction?

Effectiveness encompasses everything that clients think, feel, experience, and do. They will be ineffective and helpless in controlling other people and their actions. They have no determination over what someone says, thinks, or attempts. They have total determination over whether they buy into and accept another's assumption and assignment, or whether they hear it simply as a self-statement of the speaker.

Choosing what to engage includes meeting needs of emotional and social connection, letting go of the past, determining what desires are in the present, and installing possibilities rather than obstacles in order to proceed. Options to create include being present, centering in the current moment.

Each person elects how to spend emotional currency, including whether to spend it on worry, regret, remorse, or suffering. With awareness and the recognition of choice, self-statements can be owned and insightfully utilized. Another person can only make self-statements, so no matter how focused or directed at the Mentor Coach, it is important not to take their comments personally. This is a choice as well. Choosing not to become the container or target of someone else's self-statement is important in a relationship, especially an intimate relationship, and in regulating feelings.

When hope is still in an old context, attempts to change become frustrating and impossible. Hope in the old context does not know the present or future. Someone has to be in a new story before hope can reside in the new container and context. Hope in a past context, such as why your parents didn't love you in the way you needed and wanted, will remain fruitless, because you can no longer reenter that past. Repetition of this old storyline by attempting to write a better ending locks hope in the past.

To address conscious choices, sharpen focus on these four areas:

- *Ideals*
- *Needs*
- *Prioritized goals*
- *Clarity of tangible and specific results*

Readiness and willingness to specify these four issues mark a significant beginning. Examination and mobilization of these basic areas create new ways of thinking, doing, being, and growing. Insight, understanding, and analysis of the old story produce only a well-analyzed old story. Insight and understanding are important, but change has to be addressed as well. Change includes creating both a new experience and a new model in which to understand that experience.

Change can mean giving up the familiar, embracing risk/anxiety/perception of danger, and exposing that which you believe is dangerous or would result in danger. Trying to change your past is not change, as your past will always be the way it was.

Success also involves significant change. Greater success introduces greater adjustment. The greater the movement from the pre-success position and the shorter the time frame, the greater will be on the need for change. The professional athletes I have worked with offer a good example of a dramatic shift to sudden wealth, with new levels of challenge, demand, and stimulation all at a very young age.

Written and reviewed, daily validation and progress notes become rewarding and nurturing. Doing this is a means to affirm and recognize positive achievement. Mastery (the process and journey, as well as the metric of achievement—the goal and destination), when attained, enhances self-esteem.

This process can directly affect one's sense of self and all the qualities that self prefixes: esteem, confidence, validation, initiative, regulation of feelings and tension.

One of the most essential aspects of actualizing full intelligence and creativity is establishing a structure for it to manifest. Unique intelligence can emerge from this structure, from a disciplined, strategic schedule.





Coaching Interactions

The experience of effectiveness generates mastery, a model that is at the core of both Coaching and human motivation. To live a new life story is to construct exactly what one wants: It is not there until it is created. A life is a story written daily.

Professional Coaches typically rely on incisive questions to guide clients to their own insights and decisions—to help clients experience mastery without superimposing the Coach’s own agenda or solutions.

While a basic technique of Coaching is asking powerful questions and listening deeply together for the answers, Coaches apply different interventions. But a technique shouldn’t become a rule. The *principle* is: What is needed to further the client’s objective and enable forward movement? Another principle: Listen to your gut and pay attention to your hunches about your client. Common sense will inform the application of your intuition. Clients need more than just questions, especially when they’re in new territory, without a map. In addition to powerful questions, there are several things in our repertoire of possibilities that we do in addition to asking powerful questions. The following are considerations:

- **Endorse**
Endorse your clients' concepts and ideas when they are self-supportive, and when you want to highlight your clients' wisdom and creativity. This acknowledgment empowers them and reinforces their behavior.

One of the roles of a coach is to be advocate, and at times cheerlead. The client will benefit from celebrating small victories with you. These affirmations are internalized to become a part of the self-regulation and self-function of the client.

Acknowledge insights, reflection on difficult circumstances, as well as steps of progress are all important to highlight and affirm.

- **Mirror**

Coaches help their clients see themselves more clearly. Coaches give clients a better experience of their behaviors at times by simply holding up a mirror to behavior. An example would be to ask a client to state again what he just said, and ask him to reflect on it.

Holding a mirror can help someone see better their own self-image, and ways that they enhance or detract from that. It can help clients see themselves more accurately, and juxtapose their own ideals to compare the difference.

- **Summarize**

When clients hear their words and concepts reflected back to them, and summarized from the coach, they not only feel heard, but they feel validated.

There are some effective ways of doing this:

- » Weave their words and phrases into responses
- » Repeat back exactly what was said
- » Paraphrase what the client said

Summaries validate that you have understood your client, and it helps them to synthesize an overview of something they may have been too close to that disallowed seeing the big picture.

- **Reframe**

A reframe is when the coach offers the client a new perspective by changing the original viewpoint, changing the words to become more empowering and positive, or simply placing the client's behavior or words in a different context.

- **Brainstorm**

You have a wealth of experience and ideas that can further discussions of everything from business and marketing to people skills and human dynamics.

- **Offer ideas and insights.**

For example, the client is afraid of not making enough money.

Since fear is guide to desire, the challenge is offered, “How can you convert that fear into an intention?”

- **Strategize**

Strategies include SMART (Simple, Measurable, Attainable, Relevant, Time-bound), and understanding human dynamics and behavior.

- **Explain**

Client: “The universe is conspiring against me to present obstacles as I get more successful.”

Coach: “When you move ahead, you are aware of bumps in the road—if you weren’t proceeding, you wouldn’t encounter those bumps.”

- **Advise**

Some forward movement can be a simple suggestion based on the Coach’s experience, or the client’s blind spot.

- **Storybust**

Question or challenge automatic, habitual behavior, or limiting assumptions—especially when there is evidence it doesn’t work. Often these limiting beliefs are outside conscious awareness.

- **Give information**

The client may need guidance toward resources and information.

- **Train and redirect**

For example, give a model of how to handle conflict, including communication skills.

- **Regulate states of mind**

The client learns about states of mind, and how to access which state works best for a particular task. For example, the client may need to become calm and grounded/centered in the present moment in order to have access to both right- and left- brain synthesis in focusing on an issue. Or in order to strategize about how to build in a contemplative space before taking action.





Decision Clarification

Script specific behaviors

Researchers Steve Booth-Butterfield and Bill Reger (West Virginia University) devised a study that ran ads indicating that one glass of whole milk has the same amount of saturated fat as five strips of bacon. At a press conference, they showed reporters a tube full of fat – the equivalent of the amount of a half-gallon of whole milk. By making these healthy choices specific and tangible, the market share of low-fat milk moved from 18 to 41 percent. They moved “eating healthily” from an admirable goal to a specific choice and behavior.

When you want to affect change, you need to script these specific behaviors. When you want to affect your change in others, help them specifically script. When you want to enhance active decision-making for clients, limit and specify clear options. Change always has to begin at the level of individual decisions and specific behaviors.

Here are the leading reasons that people resist change, and understanding these reasons is an initial step for the mentor.

- **Ambiguity Aversion:** The risk of change is seen as greater than the risk of standing still. “Better the devil you know than the one you don’t.”
- People prefer a known risk to an unknown risk, even if the known risk is high. To make a change requires a leap of faith – it is a move in the direction of the unknown and unexperienced. You have no proof.
- People feel connected to other people identified with the present situation. Change threatens losing those identified with the old

way. This resonates with emotional bonds of loyalty, as well as individual status quo and group inertia.

- There may be no new role models for the new activity, or at least mentors who have been there before. To surpass those who have been both mentors and colleagues is challenging.
- You can't know you have the competence for a new situation that you've never been in before. This may be a subtle, but pervasive fear that people are concerned they won't be able to make the transition very well.
- The proposed change threatens not only people's notions of themselves, but also how others perceive them, and whether others will respond with support or a competitive jealousy.
- Narrow the choices. Decide on an attainable goal—what “good enough” is— and narrow a choice to fit that goal.

A caveat: Always consider whether the proposed change is a good idea or bad idea. Sometimes focusing on the dynamics of change and the transition process occludes clear judgment about whether it is really a good idea that needs to be fully engaged. Especially, those who automatically see change as a challenge to be engaged, may not carefully consider this notion.

Shrink The Change

The experience of reaching attainable short-term goals creates the experience of effectiveness, the most basic of human motivations. This experience of mastery builds on itself. The strategic application of the series of Next Best Actions to pursue an initiative toward a SMART goal is a fundamental mission of mentoring strategy. Facilitating steps of effectiveness, the experience of mastery and the early successes engineers hope.

From Bill Parcells, and the *Harvard Business Review*, on winning two Super Bowls: “When you set small, visible goals, and people achieve them, they start to get into their heads that they can succeed.”

And from John Wooden, the greatest college basketball coach of all time: “When you improve a little each day, eventually big things occur. Don’t look for the quick, big improvement. Seek the small improvements one day at a time. That’s the only way it happens – and when it happens – it lasts.”





Your Undeniable Benefit Statement

Your Undeniable Benefit Statement is the first sentence you say out loud when describing to people what you do as a Mentor Coach. It will be the most prominent sentence in your role description, and you may include it on the back of your business card. This statement is your response to: What do you do uniquely well, and how do you describe it?

Your Undeniable Benefit Statement is one succinct, distinctive, and compelling sentence that immediately tells people who you work with, what you work on, and the benefits. It is your value proposition and description of benefits that your clients get in working with you. The statement is not about you, the features, or the virtues of your coaching, but who you work with and the benefits they receive from working with you.

Your UB Statement is about engaging clients. The ideal response from a potential client is, “Tell me more.” The key element is if the people hearing it can place themselves inside it, as a recipient of it, and hear it speak to them about the benefit they will receive.

Craft the message with clarity, brevity, simplicity, and humanity. Avoid language that makes promises, sounds esoteric, or feels vague or abstract. Avoid jargon.

Consider this set of questions as you think about your UB Statement:

- What’s my promise?
- Who’s it for?
- What problem does it solve?

- Who else out there is similar?
- How do I stand apart?
- What set of words summarizes this?

Here are some examples of effective UB Statements:

- For a Financial Planner: “I help families reach financial independence on their current salaries.”
- For a Publishing Consultant: “I help people get their books out of their heads and onto bookshelves.”
- For a Coach with a specific niche: “I help woman executives reach financial freedom by transforming their relationship to money.”

UB sentence structure:

I help (who) _____ to (what) _____.

Steps to craft your UB Statement:

- Outline key pieces of information about your niche:
 - » What are the most crucial problems your ideal clients face?
 - » What are the most important specific goals they want to achieve?
 - » What is the most important and specific benefit or outcome my clients will receive by working with me?

Ask yourself these questions to test the completeness of your UB:

- Does this UB describe in concrete, specific, and simple terms what I do so that anyone can understand it and refer clients to me?
- Does this UB distinguish me from other professionals?
- Does this UB catalyze ideas about where I can find my ideal clients?





Group Coaching

Group coaching is a special format where you create live opportunities (in person or on a telebridge line) for individuals to gather and experience coaching within a group.

Distinct from a seminar or workshop, which is information based and focused on delivering content, group coaching is focused on providing space for group creativity and synergy - the coalescing energies that create a magical experience for each individual. The whole is greater than the sum of its parts. No doubt you've experienced this for yourself.

Why Group Coaching Works for You and Your Internal Clients

Group coaching is a fun and meaningful experience for both you and your clients. Adding this to your Human Capital Coaching practice allows you to:

- 1. Leverage your time** - because you are serving many people at the same time.
- 2. Expand the awareness of your program in a shorter time** - group coaching allows you to increase the awareness of your program across groups within an organization. People talk and want to be part of a group that is “going places”.
- 3. Enhance your skills** - holding space for many people at once builds new strength in coaching skills and increased awareness.

Clients will enjoy a different set of benefits than those of one-to-one coaching:

1. **Richness in diversity** - groups are inter-developmental, providing participants with a richer experience because of the diverse energy and ideas. Each member's unique voice and perspective is honored.
2. **More "aha" moments** - each member's issues, insights and solutions are highlighted with brilliant clarity because their own experience is witnessed, triggered and mirrored by other members in the group.
3. **Collective wisdom** - members come to trust and respect the enhanced wisdom that emerges from a well-facilitated and committed group.
4. **Accelerated growth** - members may progress faster, learn more deeply, and derive more joy from the journey.
5. **Safety in numbers** - the group coaching community provides a safe place to stretch and develop both personally and professionally. The sense of isolation and loneliness can drop away and be replaced with a sense of belonging.

You can see there are many advantages to both you and your clients when you offer group coaching. Your role is not just a facilitator. You are an agent of change - holding space for possibilities for each member of the group and the group as a whole.

Four Types of Coaching Group Structures

1. **Interdepartmental Groups** include people who all work for the **same executive leader *within the organization*** such as a group for:
 - » Senior Manager deepening leadership skills and defining leadership roles
 - » Managers of teams building management skills and improving creative problem solving
 - » Team members who are focused on a specific project

2. **Affiliated Groups** are made up of people in the **same company** who do not interact on a daily basis, and have similar issues, such as:

- » Lawyers
- » Analysts
- » Administrative Assistants

3. **Affinity Groups** are made up of like-minded people in the **same circumstance**, such as:

- » Parents with special needs children needing support in the workplace
- » Newly promoted managers
- » Wellness groups

4. **Focus Groups** are made up of people who share the **same desired outcome**, such as:

- » Working on a project together
- » Growing a new department
- » Crafting marketing materials





Ethics and Standards

Along with the body of knowledge, of tools, methods, and principles of Professional Coaching, there are ethics and standards in the field.

Whether you develop a practice as a Professional Coach with your own firm, or whether you simply add the tools and skill sets of coaching, these ethics and standards will apply to your coaching endeavors.

- Everything that is discussed in the coaching relationship, including the fact that the client is consulting you professionally, is confidential and privileged.
- Information about the client in any discussion or writing must maintain anonymity and protection from any identification with the client.
- Not trying to fix or save your client.
- Not manipulating a client into working with you.
- Giving credit for ideas and the process of the work to the client.
- Giving responsibility for the work, as well as its outcome to the client.
- Maintaining responsibility as a Mentor Coach for the framework and professional guidance of each session, as well as the coaching relationship.

- Avoiding conflicts of interest or compromising dual relationships with clients.

For information about the International Coach Federation's Philosophy of Coaching and Professional Standards, view the ICF's Standards of Ethical Conduct at <http://www.CoachFederation.org>.





Section III

The Process of Change

The Challenge of Change

We struggle to embrace change. Many of the methods to facilitate change are contrary to how the mind and brain work. Neuroscience, quantum physics, and strategic coaching have a lot to teach us about change. And resistance to change.

In studies of coronary bypass patients, when their lives are at risk unless they adopt healthier lifestyles, how many do you think change their habits? Only *one in nine*.

Why do we resist change? Even changing a story that doesn't work? What keeps people from doing what they know they need to do for themselves? Why will someone repeat behavior that doesn't work, often do it harder, and expect a different result? Even when it leads to lower energy, debt, plateaued careers, or disappointing relationships?

Role of the Mind

Part of the answer to why we resist change is in our minds.

We repeat the same story because it's our comfort zone: secure and predictable. A comfort zone may be limiting or uncomfortable, but it's familiar—a default model. We repeat because we know how it will turn out—that creates the *illusion* of effectiveness.

A new story generates uncertainty, trepidation. The easiest and fastest way to end this discomfort is to go back to the familiar: the old story.

People fail to change because they don't feel safe changing—changing means leaving their home base of reality—the internal map that is synonymous with identity. We tend to return to our default mode.

There is always the pull of the old and the fear of the new.

Role of the Brain

And part of the answer to why change is difficult is in our brains.

The hypnotherapist, Milton Erickson, told of a story from his childhood in which whenever it snowed, he would be the first to get up and go to school so that he could create a fresh path in the snow. He intentionally created a circuitous path, with zigzags and indirect turns. He noticed that each person who followed him followed the same path, until the end of the day; the path was well worn despite its circuitous route. No one started a *new, more direct route*. No matter how many turns and twists, each person in turn followed the path of least resistance.

This is how neural pathways are laid down in the brain: by early experiences, then repeated until they are etched more deeply. Even if they don't work as well. Even if they're circuitous and require way more work.

To think creatively, new neural pathways must be developed, outside the cycle of experience. Stimulation for new insight is a circumstance where the brain can't predict what will happen next. The catalyst for insight is a novel stimulus: new information or new context.

This juncture—when your mind and brain both react to leaving the familiar and engage new behavior—is the most powerful and productive focus of understanding in the ongoing process of coaching. The uncertainty of this newness can be read as evidence not to proceed, as intuition of a wrong choice. Or, as a signpost of change and progress.

Discomfort and uncertainty begin any significant journey. Our brains even have an error detection mechanism—located very close to the emotional center—that says, “This isn’t normal” when we try something new. This mechanism as part of a powerful internal navigation system.





Basic Inquiries for Story Evaluation of Clients

1. What do you want to change?

Anthing you consider a problem, barrier, or obstacle, is created by you and cannot continue to exist without you. It is not a simple matter of getting over it, countering, or adapting to it: it will remain until you create something else through thought, feeling, and action. Consider creating something else instead.

What are three behaviors or beliefs that you could change, reverse or leverage to help you toward your success?

- 1) _____
- 2) _____
- 3) _____

2. What do you need to let go?

In order to change, you also have to know what you want to let go. The bottom line, no matter how entrenched the process or how strong the hope, is “Does it work?”

As you evaluate, you may find things that you wished and hoped were different, but remain unsatisfied. This is the time to decide whether changing your strategy would make a difference or if it’s best to let go and free your attention for creating other things. Emotionally, this may be difficult, but determine to learn what you can from it, so that

it becomes an opportunity for self-awareness and correction that will enhance your future stories. In this way you are learning to convert what could have been perceived as failure into growth.

Review your beliefs and behaviors. If you could eliminate three of them from your life, which ones would have the most impact?

- 1) _____
- 2) _____
- 3) _____

3. What do you need to avoid?

There is always the pull of the old and the fear of the new. Yet there is no future in repetition. For example, avoiding engagement with someone who is draining protects your energy for a more productive choice.

What three things can you avoid that will positively rewrite your life or business story?

- 1) _____
- 2) _____
- 3) _____

4. *What do you want to keep and enhance?*

Your behavior and performance are the manifestation of your beliefs. Changing your mind changes your brain and your life: beliefs, goals, and visions drive action. Choose carefully what you engage.

Choose three areas that you'd like to keep or enhance:

1) _____

2) _____

3) _____





The Psychology of Change

We often repeat behavior that doesn't work, often doing it harder, and expect a different result. Why is repetition so compelling to intelligent people even though it is so illogical? Why is it not obvious that trying to exit an old story by simply writing a "better ending" only recreates the same story, and ensures that someone remains in it? Why don't we see that a thousand better endings to an old story don't create a new story? That too often, we see ourselves as the victims of the stories that we author and the feelings we create?

Part of the answer to these questions lies in the way our minds work: to seek familiarity and security through repetition, to stick to old storylines and habits. Predictability masquerades as effectiveness, and we repeat the same story because we know what the outcome will be. The invisible decisions that we make daily become camouflaged as habits, our collection of repetitions. We are always loyal to the central theme, the plot, of our lives, always returning to it. Any departure, even temporary, causes uncertainty and trepidation. Being in new territory—developing a new story—creates anxiety. The easiest and fastest way to end this anxiety is to go back to the familiar: the old story.

Coming to the end of an old story—or interrupting it—does not in itself generate a new story. You must concurrently create a new story.

Why can't someone just simply break out of a scarcity cycle—or chronic underachievement—and make a better life? Or launch a new business that they've dreamed often and planned well? A simple question. But without a simple answer, as it is not a matter of intellect, willpower, or just moving into a better zip code. The question assumes that there is an intact alternative, a substitute story waiting to be chosen, or another frame of mind to switch into from the one that has

so permeated every cell of brain and mind. It would be like saying, “I know a better way to lead your life—just trust and go along with me to get there.” No one would or could do that. That assumes that a new story simply awaits discovery and claim.

Of course, this is not the case, as a new story is gradually and sometimes painfully constructed by a person who must, in the process, give up what is known, secure, and predictable

You are always loyal to the internal model that you create—not as a model, but as the way things are. Repetition and resistance to change are not initially viewed as such, but as reality.

- What are the repetitions in your life that are dead-end and dissatisfying?
- What are the things you’d like to change in your life in the next 90 days?
- If you could add three things of vital importance to your life beginning this month, what would these be?





The Neuroscience of Change

And part of the answer to why change is difficult lies in the brain's preference and capacity for creating habits.

Experience converts to neuronal energy in the brain, which runs along pathways that collectively form networks. These networks are templates representing particular ways of relating, or habitual responses to certain stimuli in the environment. Consistent repetition of experience grooves these networks, strengthening them, until the brain rewires and they convert to automatic responses. The comfort or familiarity we feel from habitual behavior partly comes from the fact that habits require so little mental “processing” energy, compared with that of fresh stimuli. The brain always strives for energetic economy, choosing first to transform experience as quickly as possible to habit by building new neurons and networks as the default mode.

An example of this would be learning a new dance step. Going through new physical motions might be experienced as awkward and uncomfortable while triggering feelings of doubt and anxiety. These are predictable reactions in the mind/brain to new stimuli, requiring a shift from the automatic mode into an active level of processing. Change creates discontinuity and disrupts the “normal” state of cohesion. Enough practice, however, firmly establishes new neural pathways and networks and results ultimately in the dance pattern done without much thought or physical effort. This is called “long term potentiation.”

Behavioral patterns as well as belief systems downloaded especially from parents in the first years of life become automatic, to operate without observation or awareness. This learning mechanism that we regard as identity and character traits works consistently from earliest years. Because it runs seamlessly and automatically, we can remain

indefinitely unaware of how much we have a collection of habits. With our preference for security and comfort we are not necessarily motivated to discover, question, or challenge it. Instead we may define it as fate or “just who we are.”

But we are not hard-wired for life. Your brain and its unconscious programs are not fixed or unchangeable. You can rewrite mind software and rewire brain hardware to create a new life and money story. With new experiences, new neuronal pathways are created. This reprogramming can shift to more adaptive and successful modes. New research shows that we can rearrange and repurpose brain cell connections (neuroplasticity) as well as produce new brain cells (neurogenesis) throughout our lives. Neurons are both flexible and regenerative.

We are addressing the mind matters and brain business of change in our clients. We now have the methods and tools to effectively catalyze and accelerate the process of change.

There is an infinite sea of new patterns and possibilities to be relearned or created to further new goals. The caveat: You have to take action to diminish preprogrammed responses and to write new script for new experiences—a new story has to replace the old one.

Long-term change requires consistent practice to groove new neural pathways and establish new neuronal networks.

In the beginning, change is not only a disruption in the usual order of things; it is also an uncertain and precarious venture into new territory of mind and brain, not yet etched like the old story. While you develop familiarity with the new story, there is the likelihood, especially at times of stress or stimulation, whether good or bad, that you may move back to an old neural network. (Someone trips unexpectedly, and you immediately know his native language.) In extreme stress, the present context disappears: past, present, and future collapse into a repetition of the familiar. With a crisis, slippage to old neuronal pathways with accustomed storylines occurs; the repetition may not even be obvious

until its pattern becomes complete. This stress activation of old and well-established networks and state of mind temporarily eclipses new growth and recent change, even making it seem to disappear.

Departure from the path of the familiar in behavior and brain involves the unknown, a sense of risk. Tolerance of the unknown, the new, requires holding a belief of successfully filling that space. At times, change is something someone can get ready for only after it occurs. (And if you want to make an enemy, try to change someone.)

Change involves creating new experiences as well as evolving the context to process and understand them. For example: The anxiety resulting from making changes can be re-interpreted as a positive form of excitement—a signpost of moving ahead without familiar landmarks—instead of a warning message to run for cover.





Principles of Change

Some change occurs from the inside out, from examining and altering thoughts and feelings, with the resultant change in behavior. Some change occurs from the outside in, from creating new experiences and transcribing different thoughts and feelings.

Each individual usually has a favorite mode of how he or she works best, from the inside out, or the outside in. And at times a situation mandates change. A change in behavior, feelings, or thinking can lead the way to affect the other two.

- The prerequisite to change is not necessarily insight and understanding. You have to be in a new story before you can give up an old story. Significant life change occurs not by interpretation of the unconscious, but by doing and experiencing things differently in the present moment.
- Someone does not have to be motivated to begin doing something. An action can generate its own motivation. The professional athlete who gets up in the morning and goes to the gym may not be motivated to do so. He just does it. Sometime during the course of the workout, perhaps late into it, he becomes motivated. Or he may just do the workout because he knows that it is the thing to do in order to do what's next.
- Change requires ownership of a person's story—that authorship is an active, self-determined process, not ghostwritten by past experiences or overridden by the unconscious.

Four Principles of Change

1. Change begins with the recognition that you are the author of your own story.

The dramas of your everyday life do not just affect you, they are created by you. Whatever you think, feel, and experience is what you create each minute. Your experiences are always consistent with your theories.

As improbable as it may seem at times, you internally author your life drama. Even your most painful current scenarios originate within yourself. In order to create freedom, you first have to be aware that you are not free. Awareness begins the process, but awareness alone does not create change.

On the surface people may hear what you say, but they also sense and react to the deeper levels of what you feel and believe. These levels sometimes conflict. You may attempt to project an air of confidence while being in doubt at deeper levels. This incongruence is detectable by others, whether consciously or not and affects the way they will respond to you. You are always teaching others how to respond to you.

Habitual modes for doing things are still decisions. Everything we do is an active decision, even automatic responses using the default mode. When you have to make a choice and don't make it, you've already made it. We omit, disregard, or exclude the intolerable, the dangerous, and the unacceptable. We do not perceive the unimaginable. And we inevitably revise history to make it a continuity with the perceived present.

By opting for repetition, individuals sabotage invention and imprison creativity. The same behavior repeated long enough begins to seem like fate. That outlook can lead to despair. However pristine the theory or esteemed the therapist, mentor, or coach, the ultimate question is: Does it work? New theories alone will not drive old lived experiences into extinction. Insight, understanding, and theory do not create

change. Change requires a new lived experience to replace old lived experiences, coupled with evolving your internal model to incorporate that change, including how you regard yourself.

These two following vignettes illustrate subtle repetitions cloaked in the disguise of learning. Even though there may be no overt resistance to change, one may be burdened by knowing rather than energized by wanting to learn.

- Brian, a Professional Coach colleague, in working with a client, noted with exasperation, “There’s no place to put new learning in your head.” He confronted his client with linking new information to a related experience, and focusing on that experience without learning from the new information and experience. His client had to move to the position of “beginner’s mind” to embrace curiosity and openness to stay in touch with new experiences and information to learn from it.
- Many years ago a colleague who sat next to me at a professional meeting commented about his motivation to attend the meeting: “I come here to have what I do every day validated.” His search for validation obfuscated some possibilities of finding new and different information or perspectives to consider.

In order to change, you first have to know what you want to change—that is, know what you do not want in your life and what you want to create instead. Without this awareness, meaningful and systematic change cannot occur.

Doing something differently, being a contrarian, is not change, because it uses another person or idea as a point of reference and simply opposes it.

Reinvention begins with taking ownership of what you do, rather than living out what just seems to happen or feeling victimized by forces beyond your control. You have written the script of your life and remained loyal to it, even those parts that may not work for your best and highest good. Your life is the manifestation of your beliefs. The world occurs to you in the way you believe it to be.

2. If you want to change your life, first change your mind.

How do you take an inventory of beliefs that are self-limiting, conflictual, and compromising if they are experienced as reality? Analogous to Impressionist painting, each of your experiences is a dab of paint on a pointillist canvas. Only when you step back and view the entire picture do you recognize that the points form a pattern of a particular segment of life, and that the segments have their own unity. You create each experience, the patterns, and the composite image--and each is at a different level of awareness.

Beliefs may be conflicting, such as in the woman who indicated that she wanted to lose weight, yet wanted to enjoy life, food, and her summer free of dieting.

Letting go of a belief is a change. Outdated convictions inhabit a museum of beliefs, on the shelf near Santa Claus, neighbor to the inadequacy fear, set on the floor above that crack you cannot step on to protect your mother's back.

Informed change requires you to determine where you are now, to decide where you want to go, and to figure out how to get there. With a goal and plan, you can stay on track, recognize and avoid detours and tangents, and move more effectively toward your goals.

Without a plan you can't know where you are and cannot strategize how to get to where you want to go. If you don't know where you want to go, you can't figure out how to get there. And once you create a plan, you have to remain loyal to it, through consistent attention.

If you encounter a barrier or obstacle to your success, the solution is not getting over it, countering it, solving it, or getting around it: It is not there until you create it. Consider the possibility of not creating the obstacle—to shift your focus to create something else instead—from problems to possibilities.

A component of every internal obstacle is the associated desire. Regard the obstacle not as the problem, but as guide to the hidden desire. For example, someone fears initiating a job interview. Rather

than maintaining the obstacle by dwelling on previous unsatisfactory encounters, the fear can be converted to an intention with a preparation plan and commitment for the interview; a new experience replaces the old story of fear.

A century ago, philosopher and psychologist William James wrote that the greatest discovery of his generation was that human beings could alter their lives by altering their attitudes of mind. Billions of words and millions of therapy sessions later, the idea often still eludes us.

In our quest to understand, we believe that merely giving something a name accurately explains. The unknown in medicine can be ascribed to “a virus”. Mathematics constructs “chaos theory” to explain what defies logic and cannot be understood. The “random walk theory” of Wall Street officially postulates that the market cannot be predicted. We create the illusion of understanding and even of mastery by assigning a diagnosis.

The brain operates efficiently, to expend the least amount of energy to do a task. This efficiency means that the brain takes shortcuts based on what it already knows—the tracks already laid down and neurons tailored to certain tasks. The shortcuts save energy. The shortcuts also mean that past experience necessarily shapes current perception and processing. The brain perceives things in ways it has been trained to do. How we categorize something determines *what* we see.

When the brain encounters the unaccustomed or unexpected, perturbation occurs. The brain has to reorganize perception, which influences how we see things. We are pushed to see things in a different way—to be creative. Prompts include a novel stimulus, new information, or an unaccustomed context.

3. You are always free to change your mind, always free to change your beliefs and core assumptions about who and what you are.

Changing your mind not only alters your brain but also transforms your life. But first you have to become aware. Prediction and expectation based on the past create repetition, but based on the present and future create possibilities. A belief system constructs an obstacle or an

opportunity. Any effort to change your past is futile, as your past is over and gone.

For example, to succeed at a goal of being a giving person, subjugating your needs to those of someone else, may lead to a failure of your own growth and self-actualization. What you believe will come true. What you say to yourself, *all of it*, will make a difference. Know what you do not want to create, and what you want to create instead.

No one can believe in you more than you can believe in yourself. You live the vision of yourself and actualize your goals: be absolutely certain that you clearly and consciously know your goals.

4. You have to have a new story to be in before you can give up an old story.

To change, you have to develop a life story that contains the storylines you want. To stop doing something is not complete change—a new story incorporates new behavior and beliefs. You have to embody—actually live—this story you want. Good theory is not enough. Abstaining from an old story—such as excessive spending—is a beginning.

- » What is the biggest obstacle that you face currently?
- » What is the biggest challenge you face now?
- » What is the one thing you most want to change about your life now?
- » What is the one thing you most want to change about your finances now?





12 Basic Principles for Change and Transformation

1. Awareness of your plot and storylines.

The beginning of change is recognition that you are the author of your story. In the face of a personally created problem, barrier, or obstacle, the task is not getting over it, pushing through it, or adapting to it: It is recognizing that the obstacle is not there until you create it. Consider the possibility of not creating it and creating something else instead.

2. Assess the storylines that work and those that do not work.

In order to change, you first need to know what you want to change, and what you want to create instead in each aspect of your life: career, ideals, personal life, functioning at full capacity, happiness, relationships, financial. The bottom line, no matter how entrenched the process or strong the hope, is “Does it work?”

3. Recognize passive vs. active positions.

Active: You are the author, the casting agent, and the director of your story.

Passive: Fate; luck; destiny; assuming that you are the victim of the feeling you create, as in “I got butterflies in my stomach,” or “My fear took over.”

4. Listen to your language—it speaks your assumptions.

Words reveal an internal model.

Pressure words reveal an external point of reference and authority rather than an internal one: Should; have to; ought to; need to.

Passive language indicates perceiving yourself as the subject rather than the initiator of action: “The thought occurred to me; my anger got the best of me; it just happened.”

Limitation words reveal the assumption of constraint and limitation: Impossible; can’t; shouldn’t.

5. Address resistance to change and repetition of the old story.

Repetition ensures predictability. We repeat behavior that doesn’t work because it offers familiarity. Doing the same thing leads to a known outcome. We sometimes mistake predictability for effectiveness.

There is no future in repetition. Any departure from the familiar, even a positive one, creates anxiety and uncertainty. You need a new story to be in before you can give up the old story.

6. Take ownership of your story to become your own authority.

Reinvention begins with taking ownership of what you do, and what you do about what happens next—rather than living out what just seems to happen, or feeling victimized by forces beyond your control.

7. Decide what you want to change.

Your life is the manifestation of your beliefs. Old beliefs do not generate new ideas. Changing your mind changes your life, as beliefs, goals, and visions drive action. Choose carefully what you engage.

8. Excitement and fear are the same feeling just viewed and experienced differently.

Excitement counters anxiety when your mission is stronger than your fear.

9. Construct a map to determine where you are.

Without a map to determine where you are, proceeding with an organized and successful story (life, career, relationship, investment, etc.) will be difficult or impossible. With a map, you can see where you are, how far you've come, and how far you have to go to reach your goals.

10. Decide where you want to go.

Having a map allows you to filter distractions, to determine the route, and to discern what is tangential or a detour. Distinguishing what you want to achieve, preserve, and avoid is an ongoing processes.

11. Figure out how to get there.

Create a game plan of realistic, attainable goals with measurable results.

12. Stick to the plan..





Navigating Transitions

The *change* is the *event*. The *transition* is the *process*.

Four Components of Transition

1. *Every transition begins with an ending.* Willingly or unwillingly, an ending. It involves letting go of familiar—habitual—routines to establish new patterns.

Never underestimate the need—and the power—of letting go.

- » To do things a new way, you have to end the way you do them now.
- » To become something new, you have to give up some of the old self.
- » To transition to a new possibility, you have to let go of something familiar.

2. *People in transition will create new ways to return to the old story.*

Every ending is followed by some distress or confusion—we can expect this as part of a client's transition. Ending—confusion—new beginning.

- » People will resist both the change and the transition
- » They will return to the familiar

Coaches can reframe this return to the familiar by the client as:

- » A way of measuring progress
- » An opportunity to validate a commitment to move forward

3. *The new beginning involves changing self-perception—even aspects of identity.*

The impact and meaning of the transition may bear little resemblance to the apparent significance of the change that precipitated it. This can be confusing at first. Someone can become discombobulated by a seemingly minor illness that shatters an illusion of invulnerability.

4. *Never underestimate the changeback pressure from the system.*

A client's family. A company. It is the collective self-statement of reaction to change—an attempt to restore normal order and not do the work of change. A group or system has a status quo bias and inertia as well as an individual.

We can foster change by clients with conscious practices and effective tools. An infinite sea of new patterns and possibilities can be created to further new goals. The caveat: Someone has to take action to diminish preprogrammed responses and to write new script for new experiences; a new story has to replace the old one. There are no short cuts, since long-term change requires consistent practice—repetition—to groove new neural pathways and establish new neuronal networks. But there are effective and efficient methods to accelerate optimum change and ensure transformation.

Any new venture or stretch of current capacity naturally generates uncertainty and anxiety. Any really significant accomplishment, for anyone, always begins with unfamiliarity and risk. “Comfortable” is not where you begin, but where you arrive with mastery of new experiences. Even a good and planned change is at first a discontinuity, like a gap in the experience of self. And although the change may be anticipated, it still requires adjustment.

You can't learn to swim on paper, so you have to jump in the pool for the first time as part of the process of mastery. The only way to learn to swim is to proceed despite anxiety: to let go and jump in the pool the first time. In order to ride a bicycle, the only way to *learn* balance

is to *lose* it. If tasks such as these are perceived as terrifying, they will be avoided. If the perception of danger and the feeling of fear predominate, stopping will seem logical.

If you change your perception to *possibility* and *benefit*, you shift your perspective. Then you have to *experience* something new in order to make your commitment come true and change your reality. Choice becomes a conscious selection rather than a default behavior.

Recognizing oneself as the author, the creator, of the story challenges an assumed model and leads to deeper questions: “How do I create something else instead?” And “What will the ‘something else’ be?”

To simply stop doing something is not complete change; a new story means incorporating new behavior and beliefs. A person has to embody—actually live—this new story. Abstaining from an old story—stuckness or compromising repetitions, such as abstaining from excessive drinking or eating—is a beginning. But someone has to engage a new story before an old story can be given up.





Fixed vs. Growth Mindsets

We each have a running account of what is happening, what it means, and what we should do. Our minds constantly monitor and interpret. Mindsets frame and fuel the stories we create about ourselves.

The view you adopt—the software program of mindset you use—can significantly affect the way you live your life. Let's examine two simple versions of mindsets.

Fixed Mindset

Those with a fixed mindset try to make sure they succeed. A consuming goal is to prove oneself: in the classroom, later in a career, or in a relationship. Each situation calls for a confirmation of intelligence, personality, or character. The repeated internal questions are: Will I succeed or fail? Will I look smart or dumb? Will I be rejected or accepted? Will I be a loser or winner?

Yet with a fixed mindset, and a preoccupation with how you'll be judged, no amount of confirmation can dislodge the hypothesis of mediocrity or the need for proof.

A fixed mindset shares some of these characteristics:

- You learn things, but intelligence is basic and essentially unchangeable
- Since your traits are fixed, success is about proving that you are talented or smart
- Problems indicate character flaws
- Self-esteem repair occurs by assigning blame or making excuses

Growth Mindset

A growth mindset is based on a belief in change. You believe you can enhance and develop yourself. You become open to accurate information about talents and abilities. You use it to adjust and grow. To improve.

The growth mindset of learning is based on a belief that basic qualities are developed and evolve throughout life. The fundamental assumption is that everyone can change and grow through experience and application – that you can even change how intelligent you are.

Dr. Howard Gardner, in his book *Extraordinary Minds*, concludes that exceptional individuals with growth mindsets have a “special talent for identifying their own strengths and weaknesses.”

Whatever remains unconscious will be attributed to fate. Beliefs are often not conscious, yet we can pay attention to the best indicators of beliefs: our behavior. We can nudge ourselves toward a growth mindset:

- Am I taking ownership of my mistakes?
- What can I learn from this?
- How can I improve?

In adulthood, whatever we experience we either create or accept.





How To Mentor Change: 12 Principles

1. *Each person's life story is created.* You create whatever you think, feel, and experience at each moment. Every day is a blank page until you begin writing on it—even though it seems to “just be the way things are.” The first step is taking ownership of your story, including the assumptions that generate default behavior.
2. *Understanding begins with examination of which storylines work and which do not.* The next step is changing the ones that do not work, while keeping or even enhancing those that do work.
3. *Knowing what not to do is at least as important as knowing what to do.* You may not always know what the next right thing is, but you can almost always know what it isn't.
4. *Questions are more powerful than advice.* Questions can direct, clarify, illuminate, and even story-bust. Advice invites acquiescence or resistance; questions move the process from compliance to collaboration.
5. *When people create their own answers, they have signed on to invest in the outcome.* This investment elicits a sense of effectiveness and mastery.
6. *Identify four things: What to change, accept, let go, and enhance.* Doing this allows you to put your energy into what works, and allows you to accept and let go of what you can't change. Making this simple distinction both liberates and enhances effectiveness.

7. *We don't see things as they are; we see things as we are.* Learn to recognize your own assumptions and beliefs, and how they color what you perceive. Assumptions manifest as feelings and behaviors. By making assumptions explicit, you become able to perceive those that facilitate and those that interfere.
8. *Change is constant and inevitable; resistance to change is what generates most problems.* We are most successful when we learn from yesterday, anticipate tomorrow, and integrate the impact of new experience.
9. *Small changes lead to big changes.* Issues that seem overwhelmingly large and insurmountable can be approached by looking at the simplicity of the issue, specifying a small step to take for progress. For example, someone who feels overwhelmed at work by the number of tasks expected of him can identify one issue to deal with effectively within the next day. This focus on a specific action exercises effectiveness and initiates a model of mastery.
10. *Solutions, causes, and problems are not always related or even inter-connected.* Resolving a problem, even emotionally coming to the end of the past, does not create a blueprint for success. Strategic planning for specific goals is necessary. The client may not have prepackaged answers awaiting discovery, but is moving into new developmental territory without a map
11. *A collaboration keeps both individuals on the same side, looking at the same scene together.* Empathic listening keeps the professional aligned with the client's point of view and builds common ground for work.
12. *The benefit of doing more of what is working and less of what isn't working will become evident and self-perpetuating.*





Section IV

Co-Creating and Sustaining Success with Clients

Structure Positive Focus

The following is an exercise to bring positive focus as well as structure to your life, one day at a time. This exercise transforms each 24-hour segment of your life into a unit of positive learning experience.

- *Schedule a time just for yourself, such as a brief time-out at the end of the day, to reflect on three achievements for that day. These achievements may be about business or personal life.*
- *Write down the three achievements. Examine them to determine why they were important, why and how each of the three was significant to you for that day.*
- *Explore how you could make more progress in each of the three areas.*
- *Then for each of the three achievements write down ways that you could make more progress.*
- *Write down the specific actions or behaviors you would take in each of the three areas to further progress.*
- *Review the three areas and actions taken the next day at the designated time.*

One of the original architects of the Coaching process, Dan Sullivan, constructs a 21-day program of doing a version of these essential exercises each day for twenty-one days, believing that it takes that long for a habit to form. This process also integrates the immediate past (24 hours), the present moment of what you feel is important, and sets up the next day in a positive and framed way to create a structure and an immediate game plan. Each day clarifies and self-reinforces confidence of achievement. Whatever the motivation, understanding, insight, or plan, success depends on actual behaviors, on actions that lead to success. In his research, Dan Sullivan found that successful people are

successful because of their habits—the default mode of behaviors that become automatic. A habit is simply a behavior repeated automatically, a procedural memory of incorporated routine. Twenty-one days is the period of time required for a habit to get established and become the default mode.

Develop clarity about exactly what you want, the reality you want to materialize. Write it down to place it where you will see it each day. In doing this, you orient your mind and focus your energy in the direction you want to go.

Bad habits and nonbeneficial behaviors operate on the same principle: A behavior becomes automatic by repeating it daily in as little as three weeks. This exercise of focus on specific, positive, habitual behavior replaces maladaptive patterns with adaptive ones to make them automatic.

- *Identify bad habits and nonbeneficial behavior.*
- *Reframe the behavior to positive, beneficial results.*
- *Examine specific progress in each of the areas of behavior that can be affected presently.*
- *Consistently repeat the behavior daily for three weeks.*
- *Carve out a daily period of time specifically and consistently set aside just for you to review the most salient aspects of your day.*
- *Be loyal to yourself by honoring this time.*
- *Write down the achievements and the action for proceeding in future.*

This process brings into focus automatic behaviors, and the assumptions and motivations that bring about behavior. For example, by sharply focusing on procrastination, you can discern avoidance (reframe into a specific time goal), inadequate preparation to begin (prepare and initiate), and decision to not do something (disengage altogether and engage what you do want). Plans, structure, behavior, and actions should all further your goals.





Patterns of New Learning: 4 Phases

Often people who are engaged in a new endeavor that requires change and growth hit a plateau several weeks after beginning. Their initial excitement, spawned from the exciting new and hopeful expectations, cools off. The leveling off registers as a lessening of the ever-increasing acquisition of mastery, pleasure, and rewards. Someone may experience disillusionment, and even question why there is not more satisfaction. It is important not to read this phase as an indication of a bad choice, or as validation that the choice is not a correct fit.

1. *Initial confusion* often launches change and new learning. Awareness of the unfamiliar and uncertain registers as curiosity, or even anxiety.
2. *Increasing confidence* both with the experience of effectiveness and with positive feedback constitutes the next phase.
3. *Mastery* is the consistent experience of effectiveness and movement to a new level of excitement and validation, into its own self-sustaining “flow.”
4. *Entropy* occurs when the excitement and invigoration of the learning curve’s newness and mastery level off or decline.

You perceive what you recognize. You recognize what you have a map to know. Yet you invent your perceptions and experiences, just as the map created is not the territory itself. And you sort information into patterns and categories in order to perceive it. Einstein said, “It is the theory that decides what we observe.”

Fear, adventure, and change are all synonyms in new learning. Change may occur from the inside out, or change may be initiated on the outside, requiring adaptation to it. Change may simply be a different way of looking at something, a new way of thinking, or openness to feeling and reflection on what was previously unknown or closed off. Each of us must see and experience for ourselves the advantages of change. And we have to judge what needs to remain the same, as we may find it difficult to resist some changes, for example, an impulsive decision.

Attitudes that promote curiosity and openness introduce new learning. Learning is always a choice, a potential creation. There are many different levels of learning both internally and externally. Learning does not always have to be converted into action or into a specific metric of success.





Strategies To Deal with Change in Challenging Clients

The avoidance of change, despite a seeming need to change, could arise in any of the following ways. Each route is its own decision, and each deserves specific consideration to counter stuckness in a client.

1. Remember that you cannot determine what anyone else does. You can only question, suggest, challenge, brainstorm, advise—those interventions made from a collaborative position are most likely to have impact.
2. The relationship is the change agent.
3. Remember that the client is expert of his or her life.
4. You are most likely to create action in the client if you do not attempt to do so.
5. State your understanding of the client's experience as best you can. Listen for responses.
6. State your understanding of the client's intention as best you can. Listen for responses.
7. Find out from your challenging client what he or she has managed to do in a small way that he or she would want to do more of.
8. Find out what the client has not done yet that he or she would like to do in a future similar situation.
9. Highlight solutions that do not work, along with an empathic resonance of how frustrating that must be.

10. Find out whether the client is willing to try something different.
11. Ask how the client may want to redirect efforts toward the goal.
12. Find out whether the client is willing to redirect efforts and pursue a particular goal.
13. Invite the client to try something different, something simple and specific in the beginning that would actually be the easiest thing to do.
14. Clarify SMART goals. Co-create a specific strategy or system to address the task.
15. Pattern interruption. Any time you change one element of a system, you change the entire system, at least for a little while, until the forces of the system exert themselves to return to the previous state. Any pattern can be changed with a different interaction. Someone can change a pattern by changing the what, where, when, who, or how of the pattern
16. Visualization. Ask the client what he or she imagines it would be like to arrive at the stated goal. This visualization begins with the destination, so you can work backward to see the steps necessary to arrive there.

The first step for the client who has, e.g., a fixed finger pointed at others, is to acknowledge to yourself the impossibility of changing someone else. The assumption that someone or something else must change in order to make the client happy ensures ineffectiveness and frustration. Refocus on one thing that the client could do himself or herself in the next day or two that would create a change. The shift of focus from outside to inside, from others to oneself, parallels the Serenity Prayer familiar to many Twelve-Step groups: “God grant me the serenity to accept the things I cannot change; courage to change the things I can; and wisdom to know the difference.” In other words, focus your energy on what you can determine, and let go of what you can’t.

You are always free to change your mind. Changing your mind changes your life. To become your authentic self involves taking risks to make change, experiencing but not giving in to fear, releasing judgment and criticism, letting go of assumptions forged at an earlier time, and embracing dreams that bring mastery and accomplishment.





Avoid Common Mistakes

To avoid the most common mistakes as a Mentor Coach, remember to:

- **Speak clearly, briefly, and simply**
When you ask a question, make it simple, clear, and specific. On sentence. Then allow the client to respond. Some clients may immediately begin to talk, and learn what they're thinking by hearing themselves talk about it. Other clients are thinkers and will need a contemplative pause to formulate an answer. Respect both styles. A common mistake is to stack questions on top of each other, or to clarify the question if the client is silent.
- **Listen carefully.**
Allow the client time to create a contemplative pause and a working silence. Rather than having a place you would like the client to get to, or an answer you would like the client to generate, remain open to the outcome.
- **Regulate your state of mind and manage emotions.**
Put your ego in a blind trust at the beginning of each session. Remember that the client has done the very best job that he or she can do to show you exactly what it's like to be that client. This "showing" means that the client may bring alive in the process of the interaction with you the very issues/problems that are the ones that most need coaching. This can occur while talking about other content.

Allow the clients to generate their own answers, their own direction. Don't hijack the agenda to move the client to what you think should be doing or addressing.





Possibility Thinking

What you believe is what you'll see. This means that you are not just data determined, but also hypothesis determined. The brain as computer and as biological evolutionary system determines a story constructed to be called reality.

What is the practical value in this? About decision-making? About how to change some mental models?

1. For any situation, look at the data, but also at the hypothesis--the default assumption that appears as "given."
2. Since we shape and filter the world by our hypotheses, they need to be continuously tested.
3. Examine the hypotheses that work and the ones that don't work.
4. Challenge your thinking and assumptions.
Interact with diverse people and keep an open "beginner's mind" rather than a quick foreclosure to a new idea. Life as a series of experiments keeps a system open to the new. Premature closure occurs by too-rapid judgment, as well as moving a new idea into an already existing model to lose the context of a new model. This style of dismissal occurs frequently among very bright people with significant life experiences who immediately relate something new to something that they already know, absorbing it into an old context or meaning without sufficient examination.
5. We become comfortable and dependent on our old habits; uncertainty and discomfort result when we move away from existing internal models.

6. Use data to test a hypothesis rather than to automatically confirm it.
7. Distinguish between transforming your thinking and being caught up in a new fad.
Focus on the foreground without losing sight of the background's big picture. Repeat zooming in and out to keep perspective. Both microscopic and macroscopic views offer benefits.
8. The best way to excise something from your life is not to ignore it. The best way to avoid something is to be informed by it.
By avoiding something, you engage it, and keep it central in your life. To ignore takes energy, and moves you from a centered, healthy place. Decide what you want to keep, what you want to avoid, and what you want to let go.
9. You are always free to change your mind.





6 Step Action Plan for Achieving Goals

1. Move resolution to decision (a commitment).
2. Identify benefits (happier, more prosperous, and more secure).
3. Outline obstacles that must be recognized in order to not create them. If there were nothing preventing you from reaching your objectives, you would have already done so. Until you identify the obstacles that stand between you and reaching your objectives, you are in denial.
4. Determine who are the other people, groups, and organizations you need to work with to reach your objectives.
5. Compile additional information to accomplish this objective.
6. Set the date to reach the goal as part of your game plan.







16-Step Growth Plan

Clarify and envision the following:

1. Where you want to be, a vision coupled with purpose and objective.
2. How you see yourself and your functioning: strengths, weaknesses.
3. What you do uniquely well.
4. What you do exceptionally well.
5. What facilitates your change, progress, and success.
6. What obstacles to your progress exist.
7. How you determine success with a specific set of goals.
8. Reassessment and revision of operating plan for change and growth based on experiences.
9. Short-term and long-term goals given your unique abilities.
10. Your best opportunity now.
11. Action steps for each week.
12. What the next level will be.
13. A strategy to achieve the next level.
14. Eliminate distractions, energy drains, and time wasters.

15. After defining and specifying what is holding you back, decide the action to not create that obstacle.
16. The challenges inherent in each goal.





Elements of Successful Change: A Summary

Mentor Coaches focus on solutions rather than understanding why, on co-creating options rather than advice or dictates. Since old patterns are hard-wired, it takes consistency of focus on new experiences to change this wiring.

The first step is to help clients recognize and claim ownership of their stories, necessary in order to collaboratively understand, assess, and change.

Peter Drucker stated, “The most pressing task is to teach people how to learn.”

Some important elements involved to mentor successful change:

- Concentrate on new behaviors rather than problems in order to create new brain pathways. Identifying the problem won't solve it.
- Co-create new ways of thinking to stimulate brain circuits, with an “eye on the prize” to lay new mental maps.
- Regulate your state of mind and manage emotions to promote brainpower. New insights and adaptations occur through balanced learning: left brain and right brain, intellectual and emotional.
- Facilitate insight rather than give advice. People can usually discriminate between inquiries that prompt insight and attempts at persuasion.
- Focus on successes rather than obstacles or nonperformance. The power is in the focus.

- Emphasize positive adaptive behavior and progress; discourage attention to negative behavior.
- Facilitate new behaviors and guide the development and actualization of new mental maps.
- Collaboratively conceptualize the mental map—the internal model—of the client in order to facilitate a new level of mastery.
- In the event of diversion to old feeling or behavior, redirect ideas and energy flow to the new ideas.
- Remember that the power is in the focus, and that permanent change arises from the consistency of that focus.
- Knowledge conveyed passively is inert; knowledge generated through insight changes the brain and mind.
- Conceptualize the meta-map with the client in order to master and internalize the process. This helps create the outline to incorporate the new experiences as a storyline and part of an evolving identity.



Supporting Documents

Document Examples

Sample of Client Information Sheet

Professional Coaching includes an initial extended evaluation, weekly telephone sessions, and perhaps e-mail, telephone, and fax communication. In-person meetings are also available. Arrangements may be made to focus Coaching on your writing, speaking, or other direct working observation venues.

Date: _____ Referred by: _____

Name: _____ DOB: _____ Age: _____

Home Address: _____

City: State: Zip:

Preferred Address: _____

City: _____ State: _____ Zip: _____

Occupation: _____

Business Name: _____

Business Address: _____

City: _____ State: _____ Zip: _____

Home phone: _____ Business Phone: _____

Fax line: _____ E-Mail Address: _____

Preference for leaving messages: _____

Names of important people in your life (spouse, partner, children, friends, etc.):

Emergency Contact: _____ Phone: _____

Other information you want me to know: _____

Example of Client Intake Form

A list of priorities and information about me:

1. I want to improve or expand/extend use of the following skills or develop and create the following components to my professional/personal life:

a. _____

b. _____

c. _____

2. I want to resolve the following challenges or problems:

a. _____

b. _____

c. _____

3. I want to eliminate the following tolerations (what I'm putting up with in my life/business now):

a. _____

b. _____

c. _____

4. I want to accomplish the following measurable or observable results:

a. _____

b. _____

c. _____

5. At this point, I think that I'd like to make these fundamental changes or shifts:

a. _____

b. _____

c. _____

6. What I want and need most from you, as my coach, includes:

a. _____

b. _____

c. _____

7. Also, I want you to know that:

a. _____

b. _____

c. _____

Professional Coaching Acknowledgement

I acknowledge as part of my working relationship with _____
_____, I will be provided coaching services. We will have specifically designated components of our professional engagement that will be dedicated to coaching exchanges.

All information will be held as confidential unless I, the client, request otherwise in writing.

Professional Coaching is distinctly different from counseling and psychotherapy, and does not deal with the diagnosis and treatment of emotional problems. Coaching does not constitute medical consultation or treatment, and health care insurance does not apply.

Signature: _____ Date: _____





Personal Feedback Questionnaire: Building Awareness and Authenticity

First determine who knows you best and who will give straightforward feedback (family, colleagues, boss, minister, etc). Ask each one to jot down their impressions, opinions, and suggestions about you.

Ask these people what each of them sees as your:

- *Strengths*
- *Potential*
- *Special skills*
- *Personal and career possibilities*
- *Blind spots*
- *Unrealized potential*
- *Winning strategy (personality style that you most rely on, even when it doesn't work)*
- *Next step to take*
- *Distractions / derailers*
- *Work environment in which you would work best*
- *Work environment you should avoid*

What did you learn from the feedback you received? How will you use their feedback to create a strategy for proceeding in each area of your life?

Knowing what you want to achieve is crucial, with a game plan, specific steps, and measurable results.

Review your responses in these four areas:

- *What do you want to achieve?*
- *What do you want to maintain without change?*
- *What do you want to change?*
- *What do you want to eliminate or avoid?*

Prioritizing Goals

1. *Which of the issues will resolve itself without your doing anything?*
2. *What is the one thing that bothers you the most?*
3. *Choose the issue to resolve that would make the biggest difference in reducing your stress level.*
4. *Is there anything blocking your ability to get this done?*
5. *What have you learned that would be useful to you in this focus?*
6. *Imagine what would happen if you viewed a fear of making a mistake as an indication that a problem needs to be solved rather than as a sign of danger?*





Compromises Inventory

C*ompromise:* Something you tolerate that takes time, energy, peacefulness, or money from you in a recurring, unsatisfying way. Compromises seemingly avoid conflict and strive to create a certain appearance.

Compromises of money behavior can result from using money to regulate mood to equating money with many of the things that inherently have nothing to do with money.

Compromises of financial decisions can include not having a money mission statement, lack of a specific plan and goals, or engaging in one of several emotional fallacies regarding finances.

Compromises can result from disregarding a personal need or being disloyal to a personal ideal. Toleration of the compromise seemingly avoids conflict and strives to create a certain appearance.

In the exercise that follows, list the three most significant current compromises of your money behavior and financial decision-making.

- Design a time goal by which you will resolve, reframe, or accept each compromise to reclaim the engagement and energy given to it.
- Choose to resolve it by a certain date, for example, to make a budget within seven days.
- Reframe the toleration by moving resolution to a certain future date to avoid its being a daily energy drain.
- Distinguish reframing from procrastination.

- Or accept a concession that you have no control over and cannot determine, such as the economy or taxes; move it to the acceptance list to disengage from it.

After each of the three primary financial compromises, write the need or value you will honor as you resolve the compromise.





Compromises Resolution Schedule

Compromise Number 1

I choose to: Eliminate by (give date):
 Move to: Year 20__ list__
 Accept and assign it to my:
 Gratitude List
 Worry List
 Forever List

Strategy: _____

The need or value I will honor to resolve the compromise:

Compromise Number 2

I choose to: Eliminate by (give date):
 Move to: Year 20__ list__
 Accept and assign it to my:
 Gratitude List
 Worry List
 Forever List

Strategy: _____

The need or value I will honor to resolve the compromise:

Compromise Number 3

I choose to: Eliminate by (give date):
 Move to: Year 20__ list__
 Accept and assign it to my:
 Gratitude List
 Worry List
 Forever List

Strategy: _____

The need or value I will honor to resolve the compromise:





Mentor Coach Brand Articulation

- What do you do?
 - » State what you actually do, simply and precisely. No abstractions. Not one product or service, but the essence of your entire company that you will brand.
 - » Don't stop with a single answer. Keep going.
 - » What experience are you creating in your client?
- Why do you do it?
- Passion
- Qualification
- Experience

Have you fulfilled the need in yourself that you want to guide others to fulfill? Remember that this is a private process and statement, not for public consumption.
- How is it important? This question needs your resonance with your belief system, your core belief about what you do. It is this belief that drives you to deliver what you defined in Question 1: What do you do?
- Who do you want to impact?
- Who are your clients?
- What will happen when your clients receive what you do and your beliefs behind it?

- What would be the change if this group successfully understood and used your service or product?
- What would be a larger impact?
- What do you want to be known for in the world? Be specific. Don't think small. Pick the one change that means the most to you.
- What do you want your legacy to be? What do you want to leave behind

When Questions 1, 2, 3, and 4 (what; why; how; who) are combined, your uniqueness will be defined.





Brand Creation

- Choose one brand only to work on at a time.
- Ask yourself who you are speaking to. (The first answer should be yourself).
- Consider which basic emotions you're appealing to (fear, greed, exclusivity, guilt, and need for approval)
- Consider the basic needs of the client you will be appealing to.
- Write clear, brief, simple, humane statements about what your brand is. Keep them simple, not marketing statements, tag lines, or slogans. This is an internal statement to capture the essence and soul of your business.
- Do not compare yourself to someone else or some other company.
- In this process, write four to six different answers as you brainstorm.
- Set it aside and come back to it later. Review your answers with your partner, or with a mentor.





Final Brand Statement

The answers to these two exercises can be combined to a Final Brand Statement. A Brand Statement will inform your decisions and direction for your business.

Each question and each answer is a piece of your brand story. Combine your answers into a single sentence or two that is clear, brief, and simple.

Make your Final Brand Statement.

If you are tempted to share your statement with clients or with fellow coaches, resist it. This is an internal-use-only statement to guide you. It is your secret map.





Internal Brand

As a professional who uses coaching skills and integrates it into a broader professional life, you may find it helpful to walk through the brand exercise. Explore how your skills might be an “internal brand” or an explanation of what you specifically do with your coaching skills. Consider your role and how, from a contextual standpoint, your skills offer resources in your role.





8 Design Steps for Group Coaching

1. **Choose your niche – the group of people you serve.**

When you focus this way it helps you stand out in the crowd of service providers. Your marketing will be more effective. Ideally your niche is narrow enough so that it's easy for you to:

- » Find hundreds of them.
- » Connect with them frequently.
- » Identify their unique top challenges and goals.

2. **Identify the most pressing problem this market faces.**

What would they like to explore in depth or solve? What big goals are they pursuing that they'd be willing to pay for support to achieve?

3. Identify the many talents, skills and experiences you have in your toolbox to help your market solve their problems.

You don't have to be an expert. You came to coaching with vast skills and experiences in life. Remember that what you're trying to learn right now – your growing edge – can often be a great topic as long as it's relevant to your chosen market.

4. **Decide the type of Coaching Group Structure**

Which structure best suits your topic and market? Choose among these or create your own model:

- » Focus Groups
 - » Affinity Groups
 - » Affiliated Groups
 - » Company Groups

Also decide the number of members in your group. We recommend 6 – 8 so that you have enough energy in the group and can easily serve each member.

5. Decide what days/times your group will meet.

75-minute sessions provide ample time for contributions and support for all.

6. Set fees for your coaching group.

A per person /per month fee is an easy way to charge and often fits your prospects' budgets. Group coaching fees are generally less than your one-to-one coaching fee. Remember, fees are directly related to the value you deliver. Be careful not to under-value the service you provide.

7. Choose or reserve the location or format for your event.

For virtual groups, options are:

- » Tele-bridgeline <http://www.freeconferencepro.com>
- » Skype (all members must set up a Skype account)
- » Webinar (However, this technology is usually best for seminars and may be unnecessarily high-tech for group coaching.)

For face-to-face groups, options are:

- » Your home
- » A reserved room in a coffee shop, library or conference room
- » Hotel conference center

8. Create your marketing materials, marketing plan and begin the enrollment process. Whether you use online sales pages, broadcast emails, or fliers to promote your program, they should include:

- » Your branding
 - » Company name/logo
 - » Your name/title
 - » Tag line and/or HUB Statement
 - » Your website (for flier or email broadcast)

- » Compelling title and description.

- » Who the group is designed for.

- » “Pain points” that your group will solve.

- » Benefits they’ll gain from the group.

- » Logistics
 - » Date & time (if virtual, specify time zone)
 - » Location address, telebridge line dial-in, or Skype directions
 - » Cost

- » Registration instructions – online registration, call in or fax in

(Eventually you can create a sales page with an “enroll now” feature that takes them to an order form where they can provide their credit card info. For your first groups it’s fine to go low tech.)

The enrolling conversation is when fit is determined:

- » Are you the right coach for this prospect?
- » Is the prospect a good fit for your Coaching Group?
- » Is your group the right service for this prospect at this time?

Pay attention to your intuition and integrity during the enrollment conversation. Trust yourself. It's better to have a group that fits well than to enroll just anyone into your group. Similarly, let go of attachment to outcome. If your prospect doesn't enroll right now, trust that they know what's best for themselves.

Many of these steps apply to creating other group programs such as teleclasses, seminars, workshops, and Mastermind groups.





9 Design Steps for Facilitating Events

Designing successful internal workshops, seminars and teleclasses is simple.

- 1. Pick a topic relevant to the organization's vision and the role of human capital development.** Choose something that is highly relevant to the people in the midst of change, that you know well and that you yourself would enjoy.
- 2. Decide the length and size of the event.** How much material do you want to cover? How many people would bring in the optimal amount of energy for the time you're planning?
- 3. Create an outline.** A rule of thumb is to cover no more than 3 key points for a 1-3 hour program. Resist the temptation to over-develop your program. Less is more when it comes to facilitation. It's better to have 3 well-developed points than 10 weak points. Because you'll be facilitating discussion and discovery around a topic, leave plenty of time for interaction.
- 4. Create a compelling, keyword rich title! When people are working on developing themselves the approach needs to be different that typical corporate policy communication.** Your title needs to do most of the work to attract engaged participants and make it clear what your event is about.
- 5. Design interactive processes.** Question & answer sessions, interactive exercises, illustrative stories and possibly small group breakouts should be planned for each key point. Keep in mind that teleclasses will require interactivity that's possible over the phone.

6. **Set the expectation(if any) with respect to what you, your organizations or the attendees managers expect from attendees.**
7. **Reserve a location for your event.** Consider the location whether by phone or in person to insure that the location provides an environment conducive to creating an environment where attendees will be comfortable and engaged.
8. **Create your marketing materials.** Ideally, you want attendees to come with a baseline of expectation, clarity on purpose and with energy to make for an exciting and productive group meeting.

Remember to include the following in your invitation:

- » Your name and role
- » Compelling title and description.
- » Who the group is designed for and a reminder if they need approval to attend
- » “Pain points” that your event will solve.
- » Benefits they’ll gain from the event.
- » Logistics
- » Date & time (if virtual, specify time zone)
- » Location address, telebridge line dial-in, or Skype directions
- » Registration instructions if any -- online registration, call in or fax in.

9. **Leverage your efforts.** Have ready another way that your participants can experience you and engage in the future. Offer them sample sessions or exercises aligned with the meetings purpose. Enroll them in another program or service that you offer. Invite them to subscribe to engage in their own development. If you are doing a teleclass, send a pre-class and post-class follow up email with your contact info, web link and announcements for future offerings.





Related Articles

A Practical Discussion about Features and Benefits

Jackie Black, Ph.D.

Most of us become coaches because we want to help people do one thing or another.

Most coaches don't realize that coaching, whatever kind of coaching they do, is a business. Success in business is never automatic. Success depends primarily on good planning, preparation, organization, commitment, foresight and perseverance.

Imagine practicing archery with your eyes closed or throwing a football with a blindfold on. In both cases, being prevented from seeing your target would make it nearly impossible to hit it. It's exactly the same in business.

Building your coaching business without knowing who your target market is and without clearly articulating your compelling message will prevent you from reaching your objectives: attracting your ideal clients, enrolling ideal clients, building visibility and credibility in your niche or area of specialty, starting up your referral engine, and rolling out programs and products that your target market is clamoring for and is ready to buy from you today!

Prospects are people who don't know you and don't know anything about you. Your prospects are only asking one question: *What's in it for ME?" W I I F M* (pronounced *whif - hum*).

The underlying idea is that people are best motivated by self-interest and when they clearly understand the direct personal **benefits** that result from hiring you, their “decision to buy” will be set in motion.

What is the difference between Features and Benefits?

Features describe the physical characteristics of the product or service; what the product or service does:

1. Dr. Jackie understands the different challenges facing people living with life-threatening or chronic illness and those who love them.
2. Coach Dawn recognizes the disconnection everyone can feel in a blended family.
3. Coach Brad knows firsthand that to get where you’re going in business you need a plan.
4. Coach Roberta believes you can be a good parent and have your own needs too.
5. Coach Edward was a successful corp. exec who struggled for years and finally figured out how to uncover “what’s next!”
6. Coach Diane knows many ways to help people be more successful.
7. Coach Marlene is committed to helping women feel better.
8. Coach Bob is an expert when it comes to relating to highly motivated people who are looking for more balance.

Benefits describe how the product or service will help the client solve his/her problem; what s/he will gain by enrolling in your service or buying your product.

1. Partners of those living with Alzheimer’s will get the support you need so you can promote your own physical and emotional well-being to whatever extent possible under the circumstances; and effectively control the stressors that tax and deplete you.

2. Couples blending their families learn to make choices based on values, love and respect, and create a family that everyone feels they belong in.
3. Gen X male corporate executives gain clarity about their life's ambitions; harness their natural talents; and provide financial security for their families.
4. Moms who are committed, involved, and joyful parents can also pay particular attention to their own legitimate needs and burning desires, and stop sacrificing themselves in the name of "good parenting".
5. Folks who are too young to retire find creative solutions to living a full and satisfying life after formal employment.
6. 30-Something entrepreneurs maximize their creative juices and analytical problem-solving skills to consistently increase their productivity and exceed their revenue goals.
7. Health conscious women over 40, exhausted from years of neglecting themselves, create and implement self-care strategies and insure an alert mind and strong body for years to come.
8. Corporate Executives improve their leadership effectiveness by identifying leadership gaps and creating strategic solutions.

When you want to capture your prospect's interest, speak to their need or to solving their problem (the thing that makes them want to hire you), and clearly articulate the **benefits, not the features** of your coaching service.

Let's use the electric drill as an example, and I'll demonstrate exactly what I mean by clearly articulating **benefits**:

Nobody is going to buy an electric drill just to have one. People buy electric drills because they want holes: clean holes, deep holes, accurate holes, fast holes, holes of many sizes, holes in different materials (all **compelling benefits**).

Most people don't care what the drill is made from or how the circuitry is toggled—they care that it makes the holes they want to make

(benefit). They might also care that the drill is light-weight (but spare them a discussion of the space-age aluminum alloy casing (feature), or that it is maneuverable (feature), UL approved (feature), has a super-long cord (feature) and that it comes in its own carrying case (feature).

People who want to buy an electric drill only care about the *features* of the drill because they add to the fact that the drill makes precisely the holes they want/need to make (the **compelling benefits**).

Or take lipstick, as another example:

A woman does not care that a tube of lipstick contains tetroxomanganite hypoperoxidase (I'm making this up) unless the ingredient, by itself, is a major selling point (think Spandex™ - ok, not for lipstick, but you get the point). What is going to grab her interest is that the lipstick makes her look more attractive (**benefit**); stays put longer so she doesn't have to keep reapplying it (**benefit**); doesn't smear or "kiss off" so she doesn't have to worry about curling up against someone's shirt (benefit). Less fuss, fewer worries, and great look—these are the **compelling benefits** of this lipstick.

Clearly articulating the compelling benefits of the value you deliver to your clients is the way to make prospects wave their credit cards in your face and want to hire you.

People buy **benefits** not features!

Are you talking about what *you do*, or are you talking about the compelling benefits your clients receive when they work with you?

And finally, two important points to remember:

Don't worry about excluding potential clients by defining a very narrow target or niche, and clearly articulating the compelling benefits. This aspect of marketing is counter-intuitive. The opposite is really true! The narrower your target is, the clearer your message is, the more compelling your benefits are, the bigger the magnet is drawing *more* prospects to your coaching business—NOT fewer.

And lastly, don't confuse marketing efforts with enrolling efforts. They are NOT the same. You may enroll and work with anyone you want to. You are marketing to a very narrow target, sending a powerful message, clearly articulating compelling benefits, keeping a steady flow of prospects coming into your pipeline so you can spend more time doing the work you are meant to do with clients, and less time marketing.





Information Processing and Communication Facilitation

David Krueger MD

Developing empathy and establishing rapport with another can be facilitated by awareness of the other's primary representational system.

A wife who is more kinesthetic asks her visually inclined husband how he feels. His response, "I can see what you're saying," seems elusive. She presses him to convert his model into hers, continuing to ask how he feels, what he senses. He repeats. They escalate. Rapport derails. She accuses him of being stubborn. Baffled, he retreats.

You can communicate better by appreciating the predominant mode of your partner or colleague. If you use primarily an auditory model and your partner uses a predominantly visual mode of organizing, communication may suffer unless each of you appreciates the other's filter for perceiving and processing information and experiences.

At the beginning of a relationship, all three channels—kinesthetic, visual, and auditory—are active, both parties taking in a great deal of information, just as when traveling to a new country one is intensely taking in everything possible through all five senses. As a relationship progresses to developing and sustaining the connection, the intensity gives way to a default mode—the primary operating mode of auditory, kinesthetic, or visual. At this stage, communication issues become exaggerated.

The same models apply to executives and business owners who must be able to clearly lead and effectively communicate. Recognition of these distinct ways of processing information may be useful to consider in establishing and developing rapport and in fostering communication toward a common objective.

Information Processing Exercise

How information is perceived and channeled is one element of a life story.

Three fundamental representational systems elaborated in Neuro-Linguistic Programming based on the predominant representation channel include visual, auditory, and kinesthetic. How each person perceives, records, and recalls events depends on the predominant representational system used.

Auditory

Though not exclusive, an individual uses predominantly one representational mode. Those who take in information best through auditory presentation perceive experiences more in terms of sound and spoken word. They use phrases such as:

- *I hear what you are saying.*
- *I really want you to listen.*
- *It sounds good.*
- *Tuned in.*
- *Within hearing.*
- *Loud and clear.*

Visual

Those who primarily process in a visual way record and construct pictures or internal images of their experiences; they recall by snapping a picture into focus. Visual individuals will be inclined to say:

- *Can you picture it?*
- *I can see what you're saying.*
- *Bring this into focus.*
- *It appears to me. . .*
- *Mental image.*

- *It seems fuzzy to me.*
- *I'd like to look at it.*
- *Short-sided.*

Kinesthetic

Kinesthetic individuals experience in a bodily way, and index information by sensation and feeling. Those more kinesthetic use sensory and bodily terms, such as:

- *I need to grasp that.*
- *Hold that thought.*
- *To be more in touch with. . .*
- *Able to get a handle on it.*
- *Come to grips with.*
- *Start from scratch.*
- *Hand in hand.*
- *I'll walk you through this.*
- *Hold on.*
- *It slipped through my hands.*

Developing empathy and establishing rapport with another can be facilitated by awareness of the other's primary representational system. Neuro-linguistic program researchers and practitioners have distilled some basic principles of recognizing the particular model and using it to facilitate communication.

- *Recognize the predominant channel of processing information for yourself and your partner: auditory, visual, or kinesthetic.*
- *Respect the other person's model of the world, of perceiving and processing information along one of the three representational systems. One is not better than the other, just different.*
- *The observational skills of the type and meaning of communication is a necessary component of emotional intelligence.*
- *The meaning of the communication may be best indicated by the response that you get.*

- *The representational system, as well as the words, is only a symbol of the event, not the event itself. A map is not the territory. The model of your mind is not your mind.*
- *At times, the most important information about an individual is behavior.*
- *An individual's behavior at any moment is not who he or she is. (Yet when a particular behavior persists, remember Maya Angelou's advice, "When people show you who they are, believe them.")*
- *If what you are doing is not working, rather than doing it harder, think about doing it differently.*
- *Understanding this method of coding and understanding successful behavior and communication along one of the three models replicates and builds further success and intimacy.*





Toward Brain Hardware Optimization

Understanding Six Learning and Performance Styles

David Krueger MD

Scientists used to believe that brain cells and the connections were set early in life and did not change in adulthood. In the past decade, that assumption has been drastically disproved. Through advancement in brain imaging and other techniques, we now know that the brain as well as behavior can be trained, physically modified, and functionally transformed. The inner workings and circuitry of the brain change with new experiences.

Neuroplasticity and behavioral change occur within the context of individual styles. Some of these styles that appear more or less hard-wired need to be taken into account for optimum learning and performance.

Learning and Performance Styles

Self-management involves understanding yourself quite well: your strengths, weaknesses, learning style, working style, needs, and values.

Optimum learning and performance occur when you are in a specific state of mind matched to what you are doing. When you operate from your strengths, you optimize the potential for excellence.

In addition to recognizing strengths, knowing how you learn and perform is crucial for success. These learning and performance characteristics are styles; they can be slightly modified, but ultimately must be respected and strategically planned.

- **Readers**
Some people learn best by reading, and need to see a text or pictures in order to really comprehend material. President John Kennedy was a reader who assembled an outstanding group of writers on his staff. Part of Kennedy’s brilliance was in using these people and what they wrote to inform his decisions.
- **Listeners**
President Johnson had attained his reputation and success as a listener. When Johnson kept the same people on his staff after he succeeded Kennedy, they kept on writing. Johnson derailed his presidency by not recognizing that he was a listener, not a reader.
- **Writers**
Some people learn best by writing. Beethoven kept copious notes and amassed an enormous numbers of sketchbooks, yet never looked at them when he composed. When asked about this practice, he said, “If I don’t write it down immediately, I forget it right away. If I put it into a sketchbook, I never forget it and I never have to look it up again.”
- **Talkers**
Some people learn best by hearing themselves talk. This is a style I am quite familiar with. A significant portion of the material in my books comes from what I later jot down from teaching, presentations, and supervision of professionals— things that came to me in a different way from what I had previously thought or written out. “I don’t write because I have something to say, I write to see what I have to say.”
- **Collaborators**
Some people work best in collaboration with others. Creative pairings and the dance of ideas are common for those who perform best in conjunction with others. Some collaborators work best as team members, succeeding in a system where ideas and implementation occur as part of a group.

- Loners
Some people work best alone, preferring the purity of concentration and focus that they can achieve only in the quietness of working alone.

These predominant styles of learning—and none of them are all-or-nothing—constitute an important piece of self-knowledge and a way to facilitate performance for clients.





Goal Mapping

Getting from Where You Are to Where You Want to Go

by Laurie Cameron

No matter where you go, it helps to have a map. Whether you want to get around town or across the country, using a map will help you get to your destination more quickly and efficiently, with fewer detours. And on the road of life, when you know where you're going and how you're going to get there, you waste less time wandering around, wondering which direction to go next.

Creating a Goal Map for your life and your coaching practice is the quickest way to get focused and motivated. This process will help you create momentum and achieve lasting, sustainable results. The purpose of this article is to share with you how to create your own Goal Map that will take you from where you are right now to where you want to go!

The three major parts of this map are your Vision, your Goals, and your Action Steps.

Your Vision

When you decide to take a trip, what's the first decision you make? You pick your destination! Because if you don't know where you're going, you can't decide what to pack, how long it will take you to get there, what transportation you need to arrange, etc. The same is true with your life and coaching practice. The destination of your journey is your vision. The question to ask yourself is: "If everything was just right in my life and my business, what would it look like and feel like?"

Sometimes creating a vision for your whole life can be overwhelming. It's just too big to think about and there are too many pieces to put

together. The trick is to take one piece at a time and create a number of smaller visions. To do this, begin by listing all the different areas in your life and your coaching practice. Some of the more general life categories include physical health, finances, relationships, lifestyle, physical environment, hobbies, free time, spiritual health, and career. There will be similar categories for your coaching practice, along with some areas that are more specific to your business. These include marketing, products, services, revenue, expenses, office space, clients, systems and procedures, etc.

Once you have a list of categories, create a vision for each category. For instance, think about your vision for your office space. If your office was exactly the way you wanted it to be, what would it look like? What kind of desk do you have? What colors do you see around you? Are there plants? How do you feel when you walk into your office? Continue this process with all of the categories you listed.

Your Goals

The next step in creating your Goal Map is to identify the specific goals that will help you live your vision. Keep in mind that goals are S.M.A.R.T.: Specific, Measurable, Action Oriented, Realistic and Timely. Your goals are the smaller milestones on your journey to living your vision.

Identify the goals for each of your visions. For example, if part of your office vision is to work in a professional building and you currently have an office in your home, one of your goals would be to find a building that has the office space that would accommodate your needs. Another goal might be to purchase new furniture and equipment. You will know you're living your vision when you are actually IN your new office, sitting at your new desk, coaching a client on your new headset.

Potentially, there will be many goals within each vision. And as you journey through your Goal Map, it will change and evolve. Remember this is a dynamic, fluid process.

Your Action Steps

This is the place in the process where many people get stuck. They continue to focus on their goals, without taking the next step: list all the smaller, individual action steps they need to take in order to actually achieve their goals. The major distinction between goals and action steps is that goals are an endpoint of the process and action steps have both a beginning and an end.

Continuing with the previous example, where the goal is to have an office in a professional building, merely stating this desire doesn't yet identify what needs to be done to accomplish this goal. Some of the specific action steps would be to get the map out and decide where in town to search, call a real estate agent who specializes in office space leasing, schedule visits to different locations that meet your requirements. After that, other action steps would be to research and purchase new furniture and equipment, call the moving company to schedule the move, pack your home office; arrange for phone service in your new office, and so on.

This may sound a bit elementary, but this level of detail can be very helpful in eliminating “overwhelm-induced inertia”. When larger tasks are broken down into smaller, more manageable pieces, they tend to actually get done! So the question to ask yourself about an action step is: “Is this something I can do today?” If the answer is no, break it down further, all the way down until there's something you CAN do today.

What's helpful about this final stage of the Goal Mapping process is that when you have identified the action steps you can do today. That's all you have to do! You don't have to waste time focusing (or worrying) on what's days or weeks ahead of you. All you have to do is concentrate on one action step at a time. Small individual action steps add up quickly!

Your Goal Map

Now that you have the essence of the Goal Mapping process, you can apply it to any area of your life or your business. You can define your Vision, identify your Goals, and take Action, one step at a time. No matter where you want to go, you can draw your own Goal Map and you can get to where you're going with more focus, direction and confidence. **HAPPY MAPPING!**





Your Success Map: Mind Over Matters Success Strategies

David Krueger MD

Create a Map

A successful journey involves determining where you are now, deciding where you want to go, and figuring out how to get there. Creating a plan and plotting a course allows you to stay on track, recognize and avoid detours and distractions, measure progress, and move effectively toward goals. Without a plan, you can't know where you are, and cannot strategize to get to where you want to go. If you don't know where you want to go (a goal), you can't figure out how to get there.

11 Steps to Ignite Success

The following steps will guide success when coupled with the blueprint of how to establish specific, attainable goals:

- Have your needs and values in sharp focus.
- Know what you do uniquely well.
- Assess specific strengths, passions, and weaknesses
- Establish SMART goals:
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-Bound
- Determine 3 Key Initiatives to take for each goal (timetable: 1-2 weeks)
- Decide on the Next Best Action for each initiative (timetable: 2-3 days)

- Structure a strategy to reach and stretch each goal
- Increase tolerance of planned risk with associated fear
- Focus on specific results, action, and momentum regarding goals
- Continue assessment of disciplined activity with refinement of goals
- Endorse your progress

The time frame for each objective must be specified so that the sense of mastery can occur. A goal may have a several month timeframe. Each goal should have an initiative that can occur within the next several days, and each initiative should have a next best action, to begin within the next day or do.

Apply SMART Goals to a Personal Mission Statement

Five key questions apply SMART goals to a personal mission statement:

Who?

Who should accomplish the objective? In conjunction with others? Should certain aspects be delegated?

What?

What must happen focuses on specific outcomes within a particular time frame to achieve a goal? Each outcome should be specific, measurable, achievable, relevant, and time-bound.

How?

How to accomplish the goal may be a co-created exploration and discussion of possible approaches and alternatives, but the choice of direction must come from you, because the outcome must belong to you. A commitment needs to result.

Why?

This exploration clarifies a pathway is and precisely determines the goal. If it is unclear or uncertain, the best intention would be a promise you never keep.

When?

The time frame for each objective must be specified so that the sense of mastery can occur. A goal may have a several month timeframe. Each goal should have an initiative that can occur within the next several days, and each initiative should have a next best action, to begin within the next day or do.

7 Signposts for a Successful Journey

In each successful journey, there are identifiable markers.

- Precisely specify the goal and agenda. Clarify your agenda so that it is clear, specific, and simple. If the goal is not clear, the agenda and strategy cannot be precise. Be very specific about a goal—e.g., "getting fit" is not a goal but an outcome. Maintain focus on a specific issue until you have clarity. If there is no focus on an agenda, there can be no effectiveness or success.
- Determine what needs to happen. Identify what you need to do to further the goal of your agenda. This clarity will catalyze an approach to the needed steps. For example, if you feel overwhelmed at work with the amount of tasks, clarify one issue that can be dealt with effectively within the next day. This focus on a specific action exercises effectiveness and initiates a model of mastery for the next step.
- Convert obstacles into intentions. Internal obstacles such as fear or doubt that may seem to "stop" you are personal creations. Convert a fear or obstacle into an intention, with a commitment to a next best action. For example, if you are afraid of public speaking, an intention might be to join Toastmasters.

- Highlight the solutions. When you form a plan and immerse yourself in the process, problems dissolve into the possibilities.
- Highlight the solutions. When you form a plan and immerse yourself in the process, problems dissolve into the possibilities.
- Facilitate internal change and external change. With a new experience, anxiety and trepidation are expectable. You are in new territory, without familiar landmarks. When you are in your integrity in this new experience, feeling anxious or uncertainty is a signpost of progress, as opposed to a signal of danger as in the old story.
- Follow-up. Continue to focus on your goals and strategies. What works and what doesn't are both important. Writing your next chapter is about looking at what happens next, and considering what happens after what happens next.

Why People Give Up on Goals

Goal setting, especially the proper tools to structure, is crucial for long-term achievement. The usual problem, however, is not setting goals but completing them.

While a vision involves creativity and foresight, goals require strategy and dedication.

An extensive study on goal setting by Marshall Goldsmith and Laurence Lyons helps us understand an essential component: Why people give up on goals. Six of the most important reasons people give up on goals;

- Ownership. Someone must "buy in" to their goals and take ownership. This shifts the ownership and initiative to an internal point of reference. Then effectiveness and mastery can result.
- Time. Goal setters tend to underestimate the time it will take to complete the task (an "optimism bias"), leading to giving up.

- Difficulty. The optimism bias equally applies to difficulty as well as time.
- Distractions. People tend to underestimate the distractions and competing goals.
- Rewards. Disappointment sets in when achievement of a goal doesn't translate into other goals or to the desired happiness.
- Maintenance. Maintaining changed behavior is difficult, and there is always the pull of the old and the fear of the new.

Remember: the usual problem is not setting goals but completing them.





Relationship Facilitation

David Krueger MD

Illuminate Hidden Assumptions

We believe our assumptions are the truth. Our assumptions are about who we are, and we see what we believe. Whether we are right about our assumptions seldom comes into question, because we live them to make them reality. It's just the way things are. And, of course, no one can question reality. We perceive things the way we are, hear what we want to hear, and see what our own system allows us to see, select, register, and process.

Although confronted daily with proof to the contrary, we still assume that significant others think like we do, and believe essentially as we do. At times we wish that the other person could just know what we want and think without ever having to say.

Codependency stems from the assumption that if you love someone enough, and work hard enough to get that person to change, then change will occur. Codependency, like an addiction, is a promise never kept. The basis of a codependent and frustrating relationship is trying to get someone to change. It is not being in love with the person, but being in love with who the person might become when he or she changes. The relationship, then, is with the assumption and not the person. A woman once remarked about her husband, "I always thought how wonderful he would be if he were different."

A fundamental assumption may be, "My love will change this person." Trying to change someone is often a basic quest in a relationship. While this may stem from earliest childhood as attempts to change parents to get them to be empathic, responsive, and loving, this same attachment pattern continuing into the present will be as frustrating as it was originally. To want and expect someone to respond as an extension of

your interest or your desire in order for you to be happy guarantees ineffectiveness. If the other person does not respond according to your intended script, you may immediately feel ineffective, frustrated, and angry. Anger is an instinctive response to counter helplessness, as well as to protect against bruised esteem and worth. An important relationship decision, such as basing your marriage on the assumption that you can change the other, should be seriously questioned. Assume that what you see—all of it—is what you get.

While these issues are often approached by attempts at communication, their origin is internal and has to be addressed. The underlying assumptions may manifest in a relationship, but are not caused by the relationship.

Articulate Implicit Contracts

When you engage in a relationship, you instantly draw up an explicit as well as an implicit contract about the nature of the relationship and each respective role. Conflicts inevitably arise because segments of the implicit contract are an unconscious treaty, signed in secret by only one side.

Implicit contracts are ubiquitous. Every personal and business relationship has one. A common implicit theme reads like this: *If I do everything exactly as you want, and take good care of you, then you will do exactly what I want you to do.* When an assumed signatory breaks this contract, hurt or helplessness results, often quickly countered by anger. This unspoken contract ensures perpetual disappointment.

You create a burden for another and an inevitable frustration for yourself when you require and insist on a specific reaction. No one will ever respond exactly as you want. You give the other person freedom when you do not require a specific response.

Respect and Communicate Different Points of View

Each person's perspective is different in any relationship. It is important for each person to see the other's point of view and avoid hijacking the other's agenda. Knowing and respecting each other's point of view is the initial phase of a satisfying mutual, equal collaboration.

An intense discussion unfolded at a board meeting I attended. A senior member, known for his sometimes extreme positions and impassioned stands, had vigorously urged the board toward specific and swift action on the matter being discussed. At one point he rose from his seat and began to walk around the entire board table as he talked more loudly, punctuating his points by waving and thrusting his arms. After he had circled the room and was back at his chair he concluded, almost shouting as he slammed both palms on the table, "This is what we *have* to do!"

Breaking the stunned silence, the chairman of the board said in his wise and quiet manner, "That is a point of view."

Discussion then ensued with room for other points of view.

In an ideal situation, if you never take anything others say to you personally and recognize it as simply their own self-statement, you will not be hurt by what they say about you. In so doing, you grant yourself a particular freedom. The corollary is to take everything about yourself personally: Listen carefully and explicitly to yourself, register all the mind, body, and spirit messages from your interior. Feelings never lie, though they may speak in enigmatic code.

All you can determine in a relationship is your 50%. What you determine of your own experience is 100%. Yet nothing seems to need reforming, Mark Twain noted, as much as other people's habits.

Transference in the Coaching Relationship

If you feel you know someone instantly, you are likely replaying your old software program, assuming it is taking in and processing new information. That is, the person you've just met immediately cues your associations and familiarity to a preprogrammed set of information and characteristics. Immediate impressions often fit familiar patterns of aversion or attraction. Negative experiences or disliked aspects past relationships (or of yourself) projected onto another introduce aversion. Reminders of positive experiences as well as the promise of fulfillment of a desire inform attraction.

Transference is the repetitive ways of organizing current experiences based on past experiences. Transference is the organizing process of how we perceive, process, and attach meaning to people and experiences. It simply means we use software developed in the past to read a *current* experience. It's the combined neural lexicon of repetition + self-statement.

Sometimes this is helpful because it allows us to use vast experience in order to quickly read and respond to situations. At times it can be limiting because past perceptions and solutions become outdated. Transference is a playground of repetitions of past experiences with important people as well. The old story will get activated – come alive – alongside the new story being created. In Coaching, we focus on the new story. We don't bother the old story until it bothers us. That is, we don't engage it. If necessary, we address the belief or assumption of the old story just enough to cleave it from the present—to refocus on the new, evolving co-created story.

Two kinds of memories are activated as process in Coaching: *explicit* (factual) and *implicit* (procedural—like a relationship pattern). The Coaching relationship will activate the behavior patterns of the client. This offers an in vivo opportunity to understand and re-transcript patterns of feeling, thought, self-regulation, and behavior.

We continually help the client distinguish the old story from the new.

Models of relationships with others get established very early in life and become the software through which subsequent relationships are perceived, organized, and processed. At least until adulthood, the software is not viewed as one way of looking at things, but as the reality, as the way things are. A fish cannot describe water. It cannot get outside the system in order to do so.”

This is the basis of what I mean when I say: Don’t take it personally. And: The client is always showing you exactly what it’s like to be him or her.

It takes two real people for this co-created immersion to occur. The Coach must come to know how the client feels, senses, perceives, and processes experiences moment-by-moment, frame-by-frame. The meaning attached from the past story needs to be constantly examined in terms of its usefulness in the new story. This also means that the client allows himself to use the Coach in a way to simultaneously be inside the old and new stories.

12 Relationship Principles

1. Each person has a point of view.
2. Communication establishes a common ground for understanding different points of view and creating a mutual, collaborative agreement or plan.
3. Developing empathy with another is predicated on doing it with yourself first. Empathy is a way of listening to yourself as well as to another person’s entire experience of feeling, thinking, perceiving, and behaving.
4. What someone believes is more important than what they know.
5. To require that someone else respond to you in a particular way renders inauthentic both the person and their response.
6. What you don’t do is as important as what you do.

7. Strike while the iron is cold. Known when to be reflective and invoke principles. When the house is burning is no time to teach fire safety principles.
8. There are few true emergencies in life. “I’d like to think about that and get back to you” is a response.
9. How empathic ruptures are learned from, understood, and repaired becomes a core maintenance aspect of every relationship. Everyone fails empathically with another at times. The most important thing may not be what you have done, but what you do after what you have done.
10. To forgive someone is to free yourself; if you hold on to anger and hurt, you continue to hold the injury.
11. You cannot change yourself by first trying to change someone else. The only person you can change is you. Attempting to change someone else’s mode of processing or personality style won’t work — and will create derailments. Quicken software cannot be changed or rehabilitated to WordPerfect.
12. To have someone live an unexpressed part of yourself can be both unsatisfying and addictive.





Calibrating Intuition

David Krueger MD

As preparation for writing your new money story, one of the tools you'll use is intuition. Intuition is a “knowing” not formulated from data or intellectual processes. Intuition lets the unconscious do its job without the logical brain's getting in the way.

Intuition can flow when you don't make assumptions, when you are very present and centered. It's related to flow—like the athlete totally immersed in a procedural body memory of performance. If athletes have to think about how to perform, even for a nanosecond, it takes them to a different part of their brains and out of flow; it interferes with performance. Intuition is an energy field of flow to be attuned to internally—which can then be applied to empathically resonate with others.

This exercise that will illustrate one way to program and calibrate intuition.

First:

- » *Get in a comfortable position on your chair.*
- » *Take some deep breaths.*
- » *Say “Yes” to yourself many times.*
- » *Think “Yes” to yourself many times.*
- » *Feel “Yes” to yourself many times.*
- » *Think about something that is a definite “Yes.”*
- » *Be aware of what your body feels like when you experience “Yes.”*

Then:

- » *Think “No” to yourself several times.*
- » *Feel “No” to yourself.*
- » *Think about something that you associate with a definite “No.”*
- » *Be aware of what your body feels like when you experience “No.”*

Reflect on your experience:

- A “Yes” results in a certain kind of body signal. “Yes” is usually associated with openness and receptiveness in your body.
- A “No” results in a different kind of body signal. “No” is usually associated with emptiness, contraction, nothing.
- This exercise to focus on body experience aligned with a “Yes” or a “No” also applies to reading someone else.
- This exercise is only one example of a catalogue of intuitive perceptions. You can develop many more. Most are already there—just listen to your intuition. Trust it. You can discern the people who withdraw from or deposit to your emotional bank account.

In his book *Social Intelligence*, Dr. Daniel Goleman reviews the neuroscience of intuition and social connection. Our ability to empathically resonate with the emotion and experience of others is based in both mind and brain.





How to Turn Your Wisdom Into a Workshop

Suzanne Falter-Barns

The Technical Revolution has done a lot for us coaches – we merely have to pick up a phone or send an email to conduct business. Yet, there still is no substitute for live, personal appearances when you want your teaching to count, and that’s why I love workshops. Your participants benefit from the short-term intensity of the experience, and you benefit from actually seeing your principles and exercises in play.

If you’ve got the solution to any problem that’s out there, you can deliver it in workshop form. Here are some steps I’ve developed in my years of designing and delivering self-help workshops:

- 1. Put together a workshop people actually need.** What’s the biggest problem your target market faces – and what do you know about solving it? This is the key to filling your workshop. Find the problem you are uniquely qualified to solve. Do not rely on vague promises like “improving your life” or “boosting your creativity”. Offer us something we can really use, such as “How to Create More Time for Your Dream.”
- 2. Decide Where and How You’ll Lead the Workshop.** Basically, you have a choice: you find a location and hold the workshop yourself, or you pitch and sell it to a larger venue, such as an adult ed learning center. If you hold the workshop yourself, you will have a bigger job, but you potentially could make much more money. If someone else holds it, your audience may be more certain ... or it may not. Also, it may be hard to place your workshop with a larger venue if you don’t already have a track record doing such – unless your idea is so ‘killer’ that learning venue can resist. There is no ‘right’ answer here. Test the waters to find the best solution.

- 3. Choose a great location.** Nothing is more depressing than a workshop in a dimly lit church basement painted an institutional green. Instead, look for a sunny, fresh environment that makes you (and them) feel good. When holding your own workshop, look for inns or even B&B's that have a meeting room or living room available. Often such places will provide a room for free if they are catering your event. For shorter workshops, look to grand old libraries that have seminar rooms, or churches or temples that have recently renovated or offer more upscale facilities.
- 4. Plan the day around food.** Believe it or not, this is key. A workshop has to have an air of retreat to it, or it won't have nearly the impact you want. That's why I like to hold longer, full-day workshops that include a nice lunch and afternoon tea and cookies. This gives your participants the sense that they're really getting away from everyday life and nurturing themselves, which facilitates breakthroughs. At the same time, you can offer more benefits, and thus a more valuable workshop package.
- 5. Structure your day with lots of play.** Give these folks some things to do that get them out of their usual routine, right off the bat. In my own How Much Joy Can You Stand? workshops, I have people come to the event with a 'no-name' tag – something they can comfortably wear that expresses their essence without using their name. It's a fun way to get everyone on level playing ground. This sort of hands-on exercise can be used at least two or three times during the day to make your points more effectively. To create exercises, simply think about what sorts of activities would really move you to have fun, and think outside of the usual box.
- 6. Combine teaching with feedback.** Don't just preach; ask. During your lecture time, take occasional breaks to ask for their ideas, observations, questions, etc. You can also drive home points by creating front-of-the-room lists on a flip chart, or by having brief writing exercises, which they can share afterwards. I like timed writing exercises, quick top of the mind lists, and written responses to questions.

7. **Don't be afraid of group meditations.** If you're doing work that is at all spiritually attuned, guided meditations can be fantastic tools. Most people will give them a try, even if they've never done so before. Be sure to speak clearly throughout the meditation, and urge people to sit on cushions or chairs, but not recline. Some may be willing to share what they observed, which is often quite powerful.
8. **Let them guide you.** Sometimes you need to put aside your plan for a while, and let a powerful group conversation take over. Be sure to design your day with an extra half-hour to hour (if it's a full day) for such tangents to develop. That way, you won't be a slave to the clock, and can allow for spontaneous insights to occur.
9. **Start with a group of friends ... and get evaluations.** Your very first workshop can always be held with friends, or your R&D group, right in your own living room. Offer it for free, in exchange for detailed feedback on what worked, and what didn't. Then be sure to have the evaluation forms ready to fill out at the end of the workshop – before anyone leaves. In your evaluation, also include a place for enthusiasts to leave glowing testimonials, for use in your promo materials. (Include a request for a signed okay for use of their name and quote in your form.)
10. **Experiment.** You're going to get a lot further leading workshops if you can view this aspect of your career as a grand experiment. Some things will work; some things won't. Your job is to find out which is which, so your workshop becomes the very best it can be ... and that's the best way to fill them up!





The Answer Is Group Coaching

Jackie Black, Ph.D.

The question is:

What is a legitimate coaching business model, that takes the same marketing effort as one new one-to-one client that leverages your time and your earning potential, and is highly profitable?

That's right! Group Coaching!

We used to believe that group coaching was an extension of one-to-one work with our clients. We believed that we could only fill groups with the folks who were already in our “base.”

The truth is that Group Coaching is a legitimate business model. It takes the same marketing time, skill and effort to market, enroll and fill an entire Coaching Group as it does to get one new one-to-one client!

Group Coaching is the best way to leverage your time and earning potential as a coach; meaning you serve more clients, in less time, for more dollars.

When you facilitate small coaching groups you ...

- » Position yourself very competitively in the marketplace;
- » Create demand for your expertise;
- » Deliver accessible, affordable and tremendously valuable services;
- » Charge group clients less than your one-to-one clients;

- » Greatly increase your own hourly earnings in the most highly profitable coaching service you can include in your mix of services.

Group Coaching is far more complex than you might imagine! It isn't as simple as putting several people on a bridge or in a room and coaching them as if you were coaching one-on-one; or delivering fast-paced, high-content material as if you were facilitating a Teleclass.

There are specific design and development elements, and facilitation skills that are the backbone of any successful coaching group. There are five specific kind of coaching group structures and when you design your group you will do so around one of the specific structures.

Facilitating a coaching group means creating an experience for each member; and being people-focused and experience-focused. Coaching groups are NOT content-driven like teleclasses, workshops and seminars. In a coaching group the coach's roll is to birth or surface each member's personal wisdom and intelligence for the good of the group and for the benefit of each individual collectively.

In today's economic environment people need our services more than ever before and we have an obligation to be available to support our clients. Group Coaching is a delivery system that allows us to do just that, at a price point that people can afford, and in a format that will leverage our time and be highly profitable.

I wish you well on your journey to *Be, Do and Have* everything in your life that supports and affirms your best and most brilliant, passionate Self!





Mentalization: A Theory of Mind

David Krueger MD

There is evidence that people with stronger empathic abilities can better predict the motives and actions of others, as well as understand and connect with others in a better way.

People who can visualize and consider their future selves consistently choose to postpone impulses and engage productive activities. For example, they choose to postpone receiving some money now so that they can receive more later. They save more for the future. People who feel no real connection to their future selves make the opposite decision—to engage in an exciting, impulsive activity now, or to spend money now rather than save for the future.

Mentalization is a process—a capacity and skill we develop. Children develop a theory of mind at about age five. Before this, children do not experience the idea that others have a different way of thinking and do not see what they see. For example, they can't play hide and seek effectively, since they don't realize that others can't see them when their own eyes are closed. With accurate parental empathy to reflect the uniqueness of the child's mind and abilities, the child develops this mindfulness and sense of uniqueness—distinctness that he or she alone has thoughts and feelings that no one else has. Empathy is the echo of one in the voice of another.

Mentalization focuses on awareness of mental states in oneself as well as others. It involves awareness of these mental states as representations of reality from multiple perspectives.

A theory of mind—attending to states of mind in others and ourselves—covers two concepts applicable to Mentor Coaching:

- Knowing yourself and your states of mind – to be subjectively and objectively aware of yourself; to have empathy for yourself. As we become aware of specific mental states, we learn how to use this awareness to regulate feelings and decisions, and to negotiate relationships with others.
- Understanding the difference of the mind and experiences of the client, including that person’s beliefs, desires, mental states, and motivations that may be quite different from yours. It includes understanding the mental models of the client, e.g., to understand a certain behavior as determined by a particular state of mind.

A coaching application is an intuitive response. For example, “I want to share a hunch with to see if would be useful: When you talk about that, I have a gut feeling that there’s more that you’re not saying.” Whereupon, the client acknowledges that she had a stomachache, and realized she had swallowed some of her own feelings that she had debated about saying.

One aim of coaching is to enhance the mentalization process of clients. We engage clients to enhance their awareness of mental states and themselves as well as others, to develop empathy for themselves and others, and to understand their own dynamics as well as the human dynamics of others.

Even the most entrenched thought and behavior patterns can be changed by reprogramming the mind and rewiring the brain. This process of change requires thinking about what you’re thinking (mentalization), and awareness of where you focus attention (Quantum Physics principles).

Examples of the insight and awareness that we prompt:

- Pay attention to new ways of thinking and behaving—even though uncomfortable at first—can initiate rewiring the brain
- Focus attention on what is positive, on what one wants rather than what is negative or what one attempts to avoid

- Focus in the present moment on conscious choice rather than automatically acting on impulse
- Avoid exploration of motivation of why someone did something that didn't work
- Map new possibilities by reflecting on expectations and values to align with goals
- Challenge and examine a client's thinking that leads to a decision not to follow through on a commitment



The Old Art and New Science of Visualization

David Krueger MD

The Old Art

A vision crystallizes possibility into a fundamental, articulated idea. A vision gives hope possibility—a shape and form—to program your future while at the same time rehearsing it. You program a message for success in your mind by creating the experience of having achieved it.

Proven guidelines include the following elements:

- You must construct your *own* vision.
- The criteria to measure success need to be clearly defined. Wanting to change, to be wealthy, or to be happy are all imprecise and abstract goals.
- Be specific, simple, concrete.
- Create positive terms for success. Make your criteria in positive terms of what you want, what you will do.

Picture yourself as you have just succeeded at your goal at a specific time in the future, such as one year from now. Create this success experience specific to time, place, how you would experience yourself, and your body through all five senses. Hold the energy of the precise outcome you've just achieved, the goals met, and the feelings it brings.

Imagine the details of the scene of your success inside and outside, engaging all senses, thoughts, feelings, and bodily experience along with details of the scene. For example, for a successful transaction,

include the values and needs fulfilled, the money you have made from it, the details of what you are doing, such as shaking hands and ushering someone out of your office.

Carve out a few moments at the beginning and the end of each day to replay your vision. This vision begins the experience and outline of a goal that you can strategically realize.

The New Science

Recent positron-emission tomography (PET) scans of the brain have confirmed several things about visualization:

- Visualization brings about actual physical changes in the brain.
- The brain assimilates a mental picture whether the stimulus is actual from the optic nerve, or imagined; the brain cannot distinguish between a mental image and an actual image.
- When you repeat a vision of successfully attaining a goal, the act programs neural networks and neuronal pathways to etch the experience more strongly.
 - » Mental visualization of a complex movement can actually improve performance.
 - » PET scans have established the fact that thoughts cause physical changes in your brain.

The key elements: to hard-wire a vision as you write new code.

- Repetition. The neural networks dedicated to your vision must be renewed and repeated regularly, or they will be eliminated.
- Conscious incorporation of this new vision into an ongoing story to be ultimately metabolized as part of the self. Otherwise, you will “lose” this vision.
- Specificity. The more detailed your visual image, the more specifically etched your brain will be about achieving the goal.

- Write it down. Research on memory tells us that a new idea or fact lasts an average of 40 seconds in short-term memory before it's gone, unless you write it down to review. Read each one at the beginning and the end of each day.

Visualization *crystallizes possibility* into an *articulated idea*—the experience changes the brain. A vision serves as guide and inspiration to design ways to realize it—to live into it.

When you program your system with a visualized goal, you create structural tension in your brain—cognitive dissonance—the difference between where you are and where you visualize and affirm. Your brain then strives to end this tension by actualizing the goal. Structural tension (dissonance) in your brain will do the following things:

- Give you creative ideas
- Help you see things in your environment not seen before—a perceptual shift
- Provide motivation to take action

Affirmations to Support Visualizations

Affirmations make visualization a complete story. To achieve a goal, reprogram your automatic pilot by affirmations. Affirmations are positive statements that state the goal as if it has already been achieved. For affirmations to be optimally effective, the following characteristics need to be incorporated.

- Present tense
Begin with, “I am ...” State the goal as if you have already achieved it.
- Positive
Your brain will strive to achieve the image you focus on. A positive image is more powerful than ideas
- Personal.
Make your affirmations about your experience and

accomplishment, not to change other people's behavior.

- **Visual**
Use all five senses, different lenses: include wide-angle and close-up; make a complete picture of experiencing the success of your goal
- **Emotional**
Include a feeling word (happily interacting, peacefully experiencing). A primary reason we do things is how we imagine we'll feel when we do it
- **Brief**
Brevity is the soul of wit—and affirmations
- **Specific**
Clearly focused, specific detail makes it real. No abstractions
- **Action words**
“I am driving ... acting ... living ...”
If you say, “I am going to ...” you will always be on the way
- **Consistent**
As soon as you let up on the disciplined, focused pursuit of a goal, your automatic pilot will revert back to the familiar.

How long do you do this?

Until you reach the goal.

How many goals should you generate affirmation for?

A reasonable number—at least three—that you're working on daily.

In this way, you etch the vision and specifics of success in your brain. Then, you strategically inhabit the experience.





Client Tools

This section of the workbook can be found online. Client Tools is a proprietary website for your use only. Please do not share this link:

www.CoachTrainingAlliance.com/Resources/Tools.htm

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