Chapter 10: Conducting Coaching Sessions
Chapter 10

Conducting Coaching Sessions

“Good fortune is what happens when opportunity meets with planning.”
— Thomas Alva Edison

Chapter Contributors: Margaret Moore, Erika Jackson, Bob Tschannen-Moran, and Gloria Silverio

After reading this chapter, you will be able to:

- Identify and discuss the guidelines to follow during an initial 45-90 minute vision and planning coaching session
- Outline the Coaching Contract
- Use the Coaching Vision Tool to assist clients to develop their wellness, fitness, or health visions
- Identify and discuss the guidelines to follow during a weekly 20-45 minute coaching session
- Identify expectations for the first three months of coaching
- Demonstrate how to document first session notes
- Demonstrate how to document subsequent session notes
INTRODUCTION

Among the ICF Core Coaching Competencies is “Managing Progress and Accountability” (see Chapter 2), enabling clients to move from Point A, where they are today, to Point B, where they want to go. There are many approaches to the design and process of coaching programs and sessions that facilitate movement to Point B. Wellcoaches has developed, practiced, and refined over many years a structure for coaching sessions which has proven highly effective and provides a valuable hand-rail for new coaches. There is never only one way in coaching, yet clients, not just coaches, enjoy structure as a means to gain mastery in change. As coaches gain experience, they can modify the process of coaching sessions in ways that maintain engagement for themselves and their clients.

STEP-BY-STEP GUIDELINES FOR THE FIRST 45-90 MINUTE COACHING SESSION (CREATING A VISION, THREE-MONTH GOALS, AND FIRST-WEEK GOALS)

As discussed in Chapter 8, the initial coaching session sets the tone for the entire coaching relationship both by establishing trust and rapport and by creating the vision and goals a client will work on for weeks and months to come. Because the initial coaching session carries so much weight and covers so much ground, it takes longer than subsequent coaching sessions and may last for as long as 90
minutes. It can also be broken up into two 40 minute sessions. The checklist in Figure 10.1 identifies the flow of an initial coaching session.

**FIGURE 10.1 – Initial Coaching Session Checklist**

<table>
<thead>
<tr>
<th>√</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BEFORE THE SESSION</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review the Assessment: Seek out success, notice areas with heightened arousal, consider stages of change, question gaps, note concerns</td>
</tr>
<tr>
<td></td>
<td>Practice Mindfulness</td>
</tr>
<tr>
<td></td>
<td>Remember to use the key coaching skills: Mindful Listening, Inquiry and Reflection</td>
</tr>
<tr>
<td></td>
<td>Formulate initial, strengths-based inquiries</td>
</tr>
<tr>
<td><strong>SESSION OPENING</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Welcome and thank you</td>
</tr>
<tr>
<td></td>
<td>Thank client for completing an assessment</td>
</tr>
<tr>
<td></td>
<td>Introduction of Coach: Share personal passion, credentials, and experience if not already completed in a prior consultation</td>
</tr>
<tr>
<td></td>
<td>Review and get agreement on the Session Agenda: confirm client expectations and priorities, gather additional information, create vision, design goals</td>
</tr>
<tr>
<td><strong>EXPECTATION SETTING (if not done in a prior consultation)</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>What is coaching</td>
</tr>
<tr>
<td></td>
<td>Confidentiality</td>
</tr>
<tr>
<td></td>
<td>Record keeping</td>
</tr>
<tr>
<td></td>
<td>Establish Coaching Contract</td>
</tr>
<tr>
<td><strong>DISCUSS ASSESSMENT</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Find something positive to share from the client’s assessment</td>
</tr>
<tr>
<td></td>
<td>Ask client what s/he learned about him/herself by completing the assessment</td>
</tr>
<tr>
<td></td>
<td>Ask client what questions s/he has after completing the assessment</td>
</tr>
<tr>
<td></td>
<td>Gather missing information</td>
</tr>
<tr>
<td></td>
<td>Discuss client's medical history and need for physician release, if applicable</td>
</tr>
<tr>
<td><strong>CREATE A VISION</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Explain the value of creating a vision</td>
</tr>
<tr>
<td></td>
<td>Ask what is most important to the client right now</td>
</tr>
<tr>
<td></td>
<td>Collaborate to identify the client strengths: Review success stories, discuss what is working now, discover what gives the client pride</td>
</tr>
<tr>
<td></td>
<td>Discover the client's motivators: ask about the benefits of making changes now, ask about the driving force behind the desire to change now</td>
</tr>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Ask about the client's vision (hopes, wishes and dreams) for health, fitness, or wellness</td>
<td></td>
</tr>
<tr>
<td>Support the client in visualizing his/her vision and describing it in detail</td>
<td></td>
</tr>
<tr>
<td>Use confidence ruler to assess and improve self-efficacy</td>
<td></td>
</tr>
<tr>
<td>Ask what challenges would be met and what things would be possible if the vision were a reality</td>
<td></td>
</tr>
<tr>
<td>Discover previous positive experiences with elements of the vision</td>
<td></td>
</tr>
<tr>
<td>Identify the strengths and values that could be used to reach the vision</td>
<td></td>
</tr>
<tr>
<td>Explore the support (people, resources, systems, and environments) needed to ensure success and handle challenges</td>
<td></td>
</tr>
<tr>
<td>Ask the client to state and commit to the vision</td>
<td></td>
</tr>
</tbody>
</table>

**DESIGN THREE-MONTH GOALS**

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explain the nature and value of setting three-month goals</td>
</tr>
<tr>
<td>Brainstorm consistent behaviors that would lead to the achievement of the vision</td>
</tr>
<tr>
<td>Ask the client to choose several behavioral goals that are most important to pursue</td>
</tr>
<tr>
<td>Confirm the connection of the behaviors to the vision</td>
</tr>
<tr>
<td>Assist the client in developing SMART behavioral goals</td>
</tr>
</tbody>
</table>

**DESIGN FIRST WEEK’S GOALS**

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask the client to choose goals that are important next steps toward three month behavioral goals</td>
</tr>
<tr>
<td>Assist the client in designing SMART behavioral goals</td>
</tr>
<tr>
<td>Use confidence ruler to improve the client's confidence in reaching the goal</td>
</tr>
<tr>
<td>Explore the client’s strengths and support (people, resources, systems, and environments) needed to ensure success and handle challenges</td>
</tr>
<tr>
<td>Ask the client to restate and commit to SMART goals</td>
</tr>
<tr>
<td>Affirm the client's ability to achieve the goals</td>
</tr>
</tbody>
</table>

**SESSION CLOSE**

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Express appreciation for the client's work</td>
</tr>
<tr>
<td>Discover and reflect what the client learned</td>
</tr>
<tr>
<td>Confirm that the client is ready, confident, and committed to take agreed upon actions.</td>
</tr>
<tr>
<td>Ask for feedback on how future coaching sessions would best support the client's path</td>
</tr>
<tr>
<td>Clarify expectations regarding payments, scheduling, rescheduling, and length of sessions</td>
</tr>
<tr>
<td>Schedule the next session</td>
</tr>
</tbody>
</table>
SECTION-BY-SECTION CONSIDERATIONS

The initial planning session is the most important session in the coaching process. Your client will form a “first impression” which will be lasting.

BEFORE THE SESSION

Get yourself into the right mindset

The most important minute of a coaching session is arguably the minute right before it starts. That’s when coaches and clients clear their minds, set their intentions, and get into the coaching mindset.

Relaxation exercises can assist coaches to be completely present and client focused.

Before the session, remind yourself of these key points:

- Confidence is contagious. The more we communicate our certainty that clients can be successful, the more likely it is that clients will be successful. “What do I believe is possible, now?”
- What we appreciate, appreciates. The more we focus on what clients want, rather than on what they don’t want, the more energy and ideas clients will have for moving forward. “What do I want to appreciate, now?”
- Listen until I don’t exist. The more we set aside our own agenda, in favor of listening for the client’s agenda, the more clients will discover about themselves and discern their own answers. “What do I want to listen for, now?”
• **Tell the truth.** The more we reveal clients to themselves, through empathy and honesty, the more progress they will make toward their vision. Don’t be afraid to share what it is there. “How do I want to connect, now?”

• **Trust my intuition.** The more deeply we listen to our own instincts and inklings during coaching conversations, the more deeply clients will connect with their instincts and inklings. That’s what leads to the intuitive dance of coaching. “What is my gut saying, now?”

**SESSION OPENING**

*Establish Trust & Rapport*

It is important to make clients feel comfortable at the outset. Be friendly, warm, respectful, confident, and purposeful. Thank your clients for the privilege of being their coach and for the time they took to complete any pre-session assessments. Express confidence in their ability to reach desired goals and your ability to help them. Ask a few basic, “get-to-know-you” questions such as occupation, family, hobbies, physical activities they enjoyed as a child, or daily routine. Find an area of commonality, if you can, and mention it. Express empathy if clients appear uncomfortable. The key is to create a relational space in which trust and rapport can grow. Until that happens, the results of inquiry will be superficial and the potential of coaching to generate transformational change will not be realized.

*Introduce Yourself*

Briefly share with clients your biography, if you haven’t already done so. Avoid talking too long or too much about yourself. Ask whether they have any questions about your background. Before beginning the coaching session, ask: “What more do you want to know about me before we begin?”
When introducing yourself, convey your passion to your client, as well as describe your education and experience. Be sure to speak from your heart, rather than read from a paper. Clients can tell when you are reciting lines, and it does not sound genuine.

**Describe your Objectives for the First Coaching Session**

The first session is an opportunity to gain a good understanding of your client’s history, strengths, and goals, as well as to build a vision and plan. Explain to clients that your objectives for the first coaching session are:

- a) to learn more about their priorities, strengths, goals, motivators, challenges, and resources; and
- b) to help them develop a plan, including a vision, three-month behavioral goals, and several first-week goals.

Have your clients confirm that this is acceptable, and address any additional questions or concerns they may have.

**EXPECTATION SETTING**

**Describe the Coach Approach**

Beginning with the first session, it is crucial that clients realize they are not getting a cookie-cutter approach.

Explain briefly to your client the difference between teaching and coaching. Whereas teachers have information, expertise, and wisdom that they want to share with their students, coaches enable clients to discover a lot of that for themselves. On occasion and when appropriate, coaches may provide expert advice or knowledge during a coaching session. Most of the time, however, coaches will listen, ask questions, and reflect back what they are
hearing in ways that promote client learning, growth, and movement. That is the coach approach: it’s a personalized learning system which enables people to find their own answers and to achieve exceptional results even in the face of challenges. Share your confidence that this approach often assists clients to reach higher than they would otherwise.

Explain to clients your policies regarding confidentiality and record keeping. Assure them that coaches respect the client’s right to privacy and are fundamentally prudent in the protection of those rights (within the limits of institutional regulations and/or the law). This extends to those records created, stored, accessed, transferred, and disposed of by coaches in the course of working with clients.

The Coaching Contract
It is important for coaches and clients to agree and commit to some key principles for coaching programs before or during the first coaching session. Coaches describe this agreement and commitment as a “Coaching Contract”. Items that may be included in a Coaching Contract include the following:

Coach:

- Through the coaching process, I will enable my clients to identify their vision and plan.
- I will listen to my clients attentively and without judgment or consideration of my own agenda.
- I will help my clients identify and fully engage their strengths on the path to a better future
• I will ask questions and encourage my clients to arrive at their own answers.
• I will encourage realistic expectations and goals.
• I will be direct and firm with feedback when needed.
• I will assist my clients to brainstorm creative possibilities for moving forward and getting around roadblocks.
• When appropriate and with permission, I will offer advice and instruction for engineering fitness, good nutrition, and management of weight, stress, mindset, and health in my client’s life.
• I will be punctual and responsive.
• I will recognize early whether the chemistry with a client is good or not optimal. If not optimal, I will refer that client to another coach.
• I will acknowledge when my clients have an issue that is outside my scope of knowledge and skill, and recommend other avenues.

Client:
• I want to improve my level of health, fitness, or wellness.
• I am ready to take responsibility to make and sustain changes in at least one area.
• I am ready to invest at least three months to make improvements.
• I will be open and honest, and I will share personal information that is relevant to health and wellness.
• I am ready to become more self-aware.
• I am open to suggestions and trying new things.
• I understand that setbacks are normal on the path of change and necessary in order to establish new behaviors.
• I will be punctual and responsive.
**DISCUSS ASSESSMENT**

Even though you have carefully read through the information provided in the assessment, you will want to get further clarification and/or additional information during the initial session. New things always come out in coaching conversations.

As explained in detail in Chapter 7, inform clients that you have reviewed their assessment ahead of time, giving you a sense of where they are at right now and of what they want to work on. Explain, however, that assessments never tell the whole story and that it would assist you to coach them if they would be willing to share what the assessment surfaced for them and where they want to go with it. Ask specific questions to clarify missing information and to bolster the self-confidence of the client. Remember to seek out successes, to notice the client’s emotional charge (see Chapter 9), to identify the client’s readiness to change, and to note concerns that may relate to physical or mental health risks.

When clients talk about “failures” or things that have not worked for them in the past, assist them to reframe those experiences as learning opportunities and life lessons. We grow through “trial and correction,” not “trial and error.” By taking this non-judgmental, growth-oriented framework, coaches create a safe place in which clients can open up and say anything. Whenever possible, champion their capacity to change and assist them to find compelling reasons to try again.

Curiosity on the part of the coach empowers clients to find their own answers, to be more resourceful, and to discover new possibilities for moving forward. Curiosity is not interrogation; it is rather an open, inviting, judgment-free,
leisurely, and even playful exploration of opportunities for learning and growth. By demonstrating curiosity with your clients, you may enable them to become more curious about their own capacities and more willing to try new things.

To use curiosity well, ask deep, open-ended questions that take thought to answer and that connect clients with their heartfelt dreams and desires. Such questions often reveal information that would not otherwise come to the surface. Notice the energy shifts in your clients’ responses. Be curious when your radar picks up a change in affect, whether that’s increased energy for or resistance to change. Avoid responding to these questions with analytical questions. For example, if a client says, "I want to lose weight," or "I need to get in shape," you might say, "Tell me about what makes that important to you," or “Tell me about what that would make possible for you.” Such curiosity is likely to elicit more information than "Why do you want to do that?" because analytical “Why” questions can sound challenging or judgmental.

Questions that you may want to ask to confirm an assessment, organized by area, include:

**Personal**
- You mentioned that you have children/grandchildren. Tell me about them.
- What brought you to engage a coach?
- What would be different in your life if you felt healthier and fit?
- How supportive would your family be if you wanted to make some changes?

**Fitness**
- What fitness activities did you like in the past?
• What fitness level do you want to attain?
• What fitness activities can you see yourself doing?
• What exercise did you do last week? How often? How long was each session? At what intensity?
• I noticed from your assessment that you hate exercise. Tell me about that.
• Apparently healthy: Would you be interested in some fitness tests you can do yourself to learn your starting point (baseline)?

Nutrition
• What healthy eating habits do you have now?
• What changes would you like to make in your eating?
• How do you feel about your eating right now?
• What eating habits would you like to improve?
• What foods do you crave?
• Would you be willing to keep an eating log?
• How much water do you drink a day? What other fluids do you drink?

Weight management
• When have you been the most successful at managing your weight? Describe your experience and the circumstances.
• You said you weigh “X” now, and you’d like to weigh “Y.” What would that change make possible?
• You noted that you want to lose “X” number of pounds. Tell me about your past experiences with weight management.
• What has worked in the past?
• What hasn’t worked in the past?
• How much did you lose? Regain?
• What have you learned from your past efforts in managing weight that would be helpful in the future?
Stress

- On a scale of 0 to 5, 5 being the highest, what is your stress level most days? What would assist you to bring that number down?
- When is your stress at its lowest?
- What causes you the most stress?
- What works best for you when it comes to managing stress?
- What do you do when you're under stress?
- What have you tried in the past to reduce stress that would be helpful in the future?

Energy

- How would you describe your daily energy level?
- What fills your cup and gives you energy?
- What empties your cup and drains your energy?

Health issues

- When was the last time you were examined by a physician?
- How are you feeling today?
- You noted your cholesterol is high. How high is it? What has your physician recommended? What have you done so far to reduce your cholesterol?
- I see from your questionnaire that you have "X" [name of condition]. Are you seeing a doctor for this? How is it being treated?

Life issues

- How satisfied are you with your life?
- Do you generally feel gratitude for your life and relationships? How do you express that?
• How have you cultivated a sense of purpose, or meaning for your life?

IMPORTANT
Note: A physician’s clearance (if required) and medical data should be collected in a physical during the first month of coaching to provide baseline measurements.

Other possible questions related to an assessment include:

- What are you doing presently in this area of health, fitness, and wellness?
- Describe your best experience with this area.
- What have you done in the past that worked?
- How would you rate your mastery of this area on a scale of 0 to 10?
- What values are you striving to live by?
- How are your environment, work, and relationships impacting you?
- Tell me more about....

Although an assessment gives you a helpful snapshot of your client, asking deep, open-ended questions allows you to obtain more information to complete the picture. Be sure to note important details (see Table 10.1). One client, for example, revealed the following information during the initial coaching session.
that she had not noted in her assessment:

- Her triglyceride levels were 625.
- She is a recovering alcoholic of 15 years.
- She has been diagnosed with Attention Deficit Disorder (ADD) and takes Paxil for ADD and depression.
- She eats chocolate compulsively.
- She finds change overwhelming and stressful.
- She has a hard time focusing on one issue and feels scattered.
- She has an addictive personality.

IMPORTANT:
This is an example where referring your client to a physician or psychotherapist is important!

CREATE A VISION
The heart of the first coaching session is the creation of a vision, explained in detail in Chapter 8. The process for creating that vision builds on past accomplishments and current desires in order to generate a bold statement of future possibilities that is intrinsically attractive to the client.

The vision conversation builds on the initial perspective that coaches and clients establish and clarify through the assessment conversation. By the time the assessment conversation concludes, it should be clear where clients stand and what they want to work on. Hopefully, clients will also be feeling encouraged as to the possibilities for change. Even very discouraged clients, who have experienced repeated setbacks and disappointments, can gain new hope in conversation with a new person (their coach) who expresses empathy, honors
their strengths, and frames their experience in new ways.

Empathy is a crucial part of the coaching conversation, both when clients are excited and when clients are intimidated by the prospect of change. The key is to connect the dots between their feelings and needs. When clients make negative comments about their abilities or situation, say things such as, “It sounds like you’re feeling nervous because your needs for success and self-control are not being met. Would you be willing to tell me if I got that right?” Allow time for silence and processing before reassuring them that it is possible to develop new strategies and to take new actions that will enable them to meet their goals.

The same holds true when clients make positive comments. You may want to say, for example, “It sounds like you’re feeling excited and ready to take action because your needs for understanding and confidence are being met. Would you be willing to tell me if I got that right?” Allow time for the client to confirm, clarify, or expand on your empathy reflection before expressing gratitude and getting the client to set specific, behavioral goals.

Clarity is another crucial part of the coaching conversation. There’s no way to create a vision unless there is total honesty and complete clarity as to a client’s priorities, values, goals, issues, and motivators. You will have a sense of these from the assessment conversation, but the vision conversation makes them explicit. Indeed, the vision conversation walks clients through a strengths-based protocol that culminates in clients being able to clearly state their vision as well as their commitment to the vision. Done properly, such visions become targets that beckon.
In addition to using the Wellness Vision & Planning Coaching Tool (Table 8.1 in Chapter 8), many clients find it helpful to use a guided visualization process in the development of their vision. Such processes engage the creative, right-side of the brain in ways that stimulate bigger, more provocative dreams (see Chapter 4).

<table>
<thead>
<tr>
<th>Table 10.2 Visualization Tool for Developing a Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>This visualization exercise takes only 5-10 minutes but it can make a significant contribution as clients seek to develop their personal vision.</td>
</tr>
<tr>
<td>- Close your eyes and take a deep breath from the lower stomach and slowly breathe out. (Use this as a transition throughout the exercise.)</td>
</tr>
<tr>
<td>- In your mind, go to a quiet place where you feel comfortable, peaceful, strong, and confidant. You feel relaxed. What does your quiet place look like? How do you feel being there? Notice what’s around you.</td>
</tr>
<tr>
<td>- Picture yourself (1 yr, 5 yrs etc) from now. What does your health, fitness, or wellness look like? How do you look physically? What are you wearing? How does your body move? Notice any other changes in your life. Describe what you are doing, feeling, and thinking around your wellness?</td>
</tr>
<tr>
<td>- Imagine that it is 5 years from now and you have accomplished your goals. What does it feel like? What are you doing differently? What is the same? What did you do to get there? Who’s around you? What activities are you doing? Describe your health now. Who has helped you along the way?</td>
</tr>
<tr>
<td>- Think of one key word to sum up this experience and/or your commitment to health, fitness, and wellness.</td>
</tr>
</tbody>
</table>

Open your eyes, and let’s discuss what you learned from the exercise. Debrief with the confidence ruler and an exploration of the strengths and resources clients can call upon to make it so.

There are many such processes to choose from, including the example in Table 10.2. The key is to not be shy in connecting clients with creative modalities that
engage the whole person, including their bodies, in the search for a vision that works for them.

As clients work on their visions, the following questions can assist clients to discover not only their long-term wishes but also to begin formulating their three-month goals. All of these questions will never be used with any one client on any one occasion (or they would feel interrogated); each of these questions add value, however, and may be useful as clients seek to distill their vision into a provocative proposition.

- What would you like your health and wellness to look like in three months, one year, two years, five years...?
- What do you believe is possible?
- What are the top three values in your life? How is your health linked to these values?
- What are the top three goals in your life? How is your health linked to these goals?
- What part of your life is most important to you? How does your health fit into that?
- What would you like more of in your life? How is that linked to your wellness?
- What would you like less of in your life? How is that linked to your wellness?
- What excites you? How can we link that to your wellness?
- What would you like to accomplish in the next three months?
- What motivators might enable you to overcome your inertia and start moving forward?
• What would your life be like if you achieved your goals? How would that feel?
• What would your life be like if you do not achieve your goals? How would that feel?
• What is the best-case scenario?
• What is the worst-case scenario?
• What obstacles might get in the way of your reaching your goals and vision?
• What strategies have you used in the past to overcome obstacles? What has worked and how could you tap into that wisdom now?
• What will it take for you to make changes?
• What have you tried and accomplished in your life that is similar to this goal?
• What are some new possibilities that you haven’t considered before?
• What do you think is the best possible outcome of our coaching together?
• What do you think is the likely outcome of our coaching together?
• What do you think is the worst possible outcome of our coaching together?
• What would you like the outcome of our coaching to be?

If clients are not ready to build a vision immediately after experiencing the vision-building process, ask them think about this in the week ahead, to write down their thoughts, and to develop a vision for the next session (make it one of the first week’s goals).

DESIGN THREE-MONTH GOALS
After a compelling vision has been articulated by your client, or deferred until later, explain that a three-month horizon for goals is effective because it’s long enough to make meaningful progress and experience the benefits, while short enough to stimulate a sense of urgency.
It is important to prioritize the goal areas by importance to the client. Ask what matters most and why? Is it fitness, weight loss, health, nutrition, stress management, or life balance/satisfaction? Then, work with your clients to brainstorm and commit to specific three-month behavioral goals in the priority areas that will help them realize their vision (see Chapter 8). Before moving on to the first week’s goals, be sure clients are able to clearly state and summarize their three-month goals.

DESIGN FIRST WEEK’S GOALS
Start the discussion of weekly goals by focusing on the three-month goals of highest priority, then work through other areas that are important to the client. For each area, ask clients what they want to do during the next week. Once a SMART goal is set, be sure to explore the support (people, resources, systems, and environments) needed to ensure success. This will assist clients to be more confident and ready to take action.

Ask your client what is a realistic goal in each area. If clients can’t come up with a goal on their own, offer to brainstorm ideas with them by taking turns until multiple possibilities have surface. This co-creative process avoids the problem of coaches making expert prescriptions. Once enough possibilities have surfaced, assist clients to pick the ones that are the most realistic, interesting, and stimulating. Once a goal has crystallized, ask clients to restate and summarize the goal in their own words. Be sure they sound committed. Reflect back the energy and emotion until the prospect of working on the goal is clearly making life more wonderful for the client.
Pay attention to whether clients appear ready to jump in or to just take a small step. As discussed in Chapter 8, the best goals are achievable stretch goals. These are the goals that get clients into flow and that become self-reinforcing. Clients will vary as to how hard they want to push themselves. The key is to listen to the energy of clients and to dance with them in the creation of goals that they fully own and that have a high probability of success in moving them closer to their vision.

A written summary of goals should be exchanged between coaches and clients after every coaching session. This serves to facilitate the accountability process and to keep the conversation moving forward from week to week. Initially it is helpful for the coach to write up the plan – vision, three month goals, first week’s goals – in order to demonstrate how to summarize a succinct and compelling plan.

SESSION CLOSE
To wrap up the first session, express appreciation for their work, recapitulate what they learned, and confirm that they are ready, confident, and committed to take agreed upon actions. Ask clients to confirm their confidence level on a scale of 1 to 10 (10 being the highest). If the level is below 7, discuss further how to increase it to an 8 or above.

IMPORTANT:
If clients do not seem ready, confident, and committed to take action, realize that they may be in the early stages of change in this area. Ask whether now is the right time for them to be working on making changes with a coach. If so, design goals that will enable them to think about, explore feelings, and learn about the changes they want to make. Affirm that clients can postpone coaching until they
are ready, willing, and able to change (unless the coaching is mandated by a third party).

The questions you ask during the session wrap-up can help you avoid taking anything for granted. You may want to repeat some of the questions from the assessment to make sure you have the correct information and/or fully understand the client’s responses. Always ask if there is anything you should know that was not talked about, as you begin working together.

*Get feedback on the Coaching Session*

It is important both for your own learning and for your client’s growth to get feedback on the coaching session before ending the session. Asking questions, such as the following, provides valuable insight into what the client wants from the coaching experience: “What was the most valuable part of today’s session?”, “How could future coaching sessions best support your path?”, “Is there anything you’d like to change about our session?”, or “What can I do differently to better serve you?”. Unless they are asked directly, clients may not tell you that they would like the coaching to be different.

*IMPORTANT:*

Clients may be thrilled by the first coaching session, but don’t take for granted that their satisfaction is sustained in future sessions. Keep getting feedback and fine-tuning the program. Request that clients email you any post-session thoughts in case they think of additional feedback later or they are not comfortable sharing something during the session. If you have doubts about the coaching chemistry, mention your concern. And ask if the feeling is mutual. If so, give the client permission to find another coach and offer to help with the process.
Schedule the Next Coaching Session

Explain to your clients that meeting weekly, biweekly, or monthly (their preference) for 30-45 minute sessions for 12-24 weeks is the best way to make changes to meet their personal goals, experience benefits, overcome challenges, and reach the stage where they are confident that they can keep doing the action steps on their own. If a session is missed, the client should continue with the same set of goals the following week and send a progress report by email.

**STEP-BY-STEP GUIDELINES FOR SUBSEQUENT 30-45 MINUTE COACHING SESSIONS**

(ACHIEVING GOALS AND REALIZING A VISION)

**Time Management**

Weekly coaching sessions can be viewed as having three parts: a beginning, middle, and end. In a 30-minute session, this can be compared to a 10-minute warm up (for Goal Review), an 18-minute workout (for Generative Moment and Goal Setting), and a 2-minute cool down. Thinking through the time management dynamics of the conversation before each session, making adjustments as situations come up, will assist coaches and clients alike to be more successful and satisfied with the coaching experience.

In a weekly coaching session, the following percentages indicate how coaches may want to spend their time with clients. Following the percentages, the number of minutes that coaches may want to spend with clients in each section during a 30-minute conversation is indicated.
• Session Opening – 7% (2 Minutes)
• Weekly Goal Review – 20% (6 Minutes)
• Three-Month Goal Review (at least monthly) – 7% (2 Minutes)
• Generative Moment – 40% (12 Minutes)
• Goal Setting – 20% (6 Minutes)
• Session Close – 6% (2 Minutes)

The checklist in Figure 10.2 identifies the flow of a typical subsequent coaching session.

**FIGURE 10.2 – Weekly Coaching Session Checklist**

<table>
<thead>
<tr>
<th>√</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEFORE THE SESSION</td>
<td>Review notes from previous session(s)</td>
</tr>
<tr>
<td></td>
<td>Practice Mindfulness</td>
</tr>
<tr>
<td></td>
<td>Remember the key coaching skills: Mindful Listening, Inquiry, and Reflection</td>
</tr>
<tr>
<td></td>
<td>Formulate initial, strengths-based inquiries</td>
</tr>
<tr>
<td>SESSION OPENING</td>
<td>Ask how the client is right now “in this moment.”</td>
</tr>
<tr>
<td></td>
<td>Use reflections to show understanding of client’s state.</td>
</tr>
<tr>
<td></td>
<td>Ask the client to share the best thing that happened from previous week(s)</td>
</tr>
<tr>
<td></td>
<td>Reflect something positive about the client (e.g., highlights, strengths, or emotions)</td>
</tr>
<tr>
<td></td>
<td>Ask client to select the first weekly goal to be discussed</td>
</tr>
<tr>
<td>WEEKLY GOAL REVIEW</td>
<td>Explore full experience with weekly goal, starting with the positive</td>
</tr>
<tr>
<td></td>
<td>Use reflections to show listening and understanding of the goal experience</td>
</tr>
<tr>
<td></td>
<td>Expand inquiry about the client’s best experience with his/her weekly goal</td>
</tr>
<tr>
<td></td>
<td>Respond to client challenges with judgment-free reflections and inquiries</td>
</tr>
<tr>
<td></td>
<td>Ask what the client learned from his/her experience</td>
</tr>
<tr>
<td></td>
<td>Affirm the client: strengths, choices, and/or situation</td>
</tr>
<tr>
<td></td>
<td>Inquire about the client’s percentage of success</td>
</tr>
<tr>
<td>✓</td>
<td>Action</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>THREE-MONTH GOAL REVIEW</strong></td>
<td>Validate the relevance of the client’s Vision and connection to three-month goals</td>
</tr>
<tr>
<td></td>
<td>Ask about the client’s best learning or growth experience with his/her three-month goals</td>
</tr>
<tr>
<td></td>
<td>Ask about the client’s level of commitment with his/her goals and whether he/she wants to revise them</td>
</tr>
<tr>
<td></td>
<td>Affirm the client’s strengths, abilities, or growth.</td>
</tr>
<tr>
<td><strong>GENERATIVE MOMENT</strong></td>
<td>Collaborate with the client to identify the topic to work on, where he/she has aroused emotional energy and interest</td>
</tr>
<tr>
<td></td>
<td>Ask for permission to explore and work on the topic now</td>
</tr>
<tr>
<td></td>
<td>Encourage the client to describe what he/she really wants now, in relation to the topic</td>
</tr>
<tr>
<td></td>
<td>Explore the strengths or values the client can leverage to move forward</td>
</tr>
<tr>
<td></td>
<td>Explore the environments the client can leverage to move forward</td>
</tr>
<tr>
<td></td>
<td>Explore decisional balance and develop discrepancy when the client demonstrates ambivalence</td>
</tr>
<tr>
<td></td>
<td>Engage the client in creative brainstorming of pathways forward</td>
</tr>
<tr>
<td></td>
<td>Express confidence in the client's ability to move forward</td>
</tr>
<tr>
<td><strong>GOAL SETTING</strong></td>
<td>Ask the client to choose a goal that is important</td>
</tr>
<tr>
<td></td>
<td>Assist the client in designing a SMART behavioral goal</td>
</tr>
<tr>
<td></td>
<td>Use confidence ruler to improve the client’s confidence in reaching the goal</td>
</tr>
<tr>
<td></td>
<td>Explore the support (people, resources, systems, and environments) needed to ensure success and handle challenges</td>
</tr>
<tr>
<td></td>
<td>Ask the client to restate and commit to the SMART goal</td>
</tr>
<tr>
<td></td>
<td>Affirm the client's ability to achieve the goal</td>
</tr>
<tr>
<td><strong>SESSION CLOSE</strong></td>
<td>Communicate an appreciation of the client’s work in the session</td>
</tr>
<tr>
<td></td>
<td>Discover and reflect what the client learned in the session</td>
</tr>
<tr>
<td></td>
<td>Ask for feedback on how future coaching sessions would best support client’s path</td>
</tr>
<tr>
<td></td>
<td>Schedule next session</td>
</tr>
</tbody>
</table>
SECTION-BY-SECTION CONSIDERATIONS

Many of the first-session considerations carry over to the subsequent weekly sessions. That’s especially true when it comes to clients in the preparation stage of readiness.

BEFORE THE SESSION
Review your notes and get yourself in the coaching mindset. Prepare some initial, strengths-based inquiries that have the potential to generate an upward spiral from the outset of the conversation. Remember to let the client find the answers even when you think you have a better idea. Utilize the power of listening, inquiry, and reflections.

SESSION OPENING
Reestablish Trust & Rapport
Trust and rapport are not earned once and for all, during the first coaching session. They are earned all over again, each time coaches and clients meet. Understanding this phenomenon, be prepared to start the conversation by asking about the client’s feelings and energy now, in the moment. Listen mindfully. Then explore the highlights rather than the problem areas of the past week. When clients show up with great discouragement or low energy, the highlight question may reconnect them with their own resourcefulness and power. When that does not happen directly, be sure to express empathy for the client’s feelings and needs. By understanding and supporting clients on this level, coaches assist clients to regain their balance and to consider anew the possibilities for change.

WEEKLY GOAL REVIEW
Once a life-giving connection has been reestablished, it’s time for clients to select
the first weekly goal to be discussed. Don’t assume that this will turn out to be the most important goal for the client. It is, rather, an opening for conversation and an opportunity to resume the dynamic of coaching.

Most clients will set 2-5 SMART goals to work on between coaching sessions. Each of these goals should be reviewed to discover client accomplishments, challenges, and learnings. Be sure to start with a positive, “best experience” question for each goal. Note any challenges that get identified and assist clients to reframe “failure talk” as “learning opportunities.” Pin down the details. Quantify their percentage of success (rather than their lack of success). Reassure clients that course corrections are to be expected on any journey and that you will assist them to make the necessary corrections. See Chapter 8 for a complete discussion of goals and goal review.

THREE-MONTH GOAL REVIEW
It is not necessary to review the vision and three-month goals on a weekly basis. It is important, however, to do so at least monthly in order for the weekly goals to stay connected to the client’s larger vision and purpose. It is motivating and empowering to connect the dots between smaller, incremental steps and larger life goals.

GENERATIVE MOMENT
After all the goals have been reviewed, it is usually evident as to the one that clients are most stimulated by or struggling with. Sometimes it is success and excitement that carries them forward into a generative moment. Other times it is challenge and resistance. Either way, coaches will want to spend extra time with clients around these areas. These are the big rocks that clients want to move in
order to reach their visions. See Chapter 9 for a complete discussion of moving clients through generative moments.

**GOAL SETTING**

Goal setting flows naturally upon the heels of a generative moment. When clients have elevated their self-efficacy for goal accomplishment, especially in an area that is important to them, they want to set new goals for the week ahead that will keep them moving forward. Be sure the goals are SMART, owned by the client, and supported by as many structures as possible.

In addition to the goals that flow out of the generative moment conversation, be sure to set goals in all areas of interest or concern for the client. Circle back to the goals review and identify what will be done in each area in the week ahead.

**SESSION CLOSE**

As with the session close for the first session, it is important to end on a positive note. Express appreciation for the client’s work and capture what the client learned. Ask for feedback on how to make the coaching session even more useful in promoting forward progress for the client before scheduling the next session. Remind clients that they can send you feedback at any time and that you take client suggestions seriously. It will assist you to coach them better if they can become articulate about the kind of coaching relationship that is most motivating and impactful.

**WHAT TO EXPECT DURING THE FIRST 3 MONTHS OF WORKING WITH A CLIENT**

Although every client and every coaching interaction is unique, there are some common changes and themes that often happen at certain points in the coaching
process. It is important to be aware of what can you expect from clients during the first three months, some of the common situations they might experience along the way, and possible approaches you can take. You may encounter none, one, or more of these situations with each client.

**First Month**

*Expectations:* Enthusiasm, high motivation, openness, high achievement.

*Situation:* Clients may tend toward being overzealous and unrealistic.
*Approach:* Carefully monitor goals to help clients' keep them realistic.

*Situation:* Clients are slow to become motivated and do not make noticeable progress.
*Approach:* Address readiness to change or motivational problems through AI and MI (Chapters 4 and 5). Discover strengths, explore feelings, build self-efficacy, weigh the pros and cons of change, modify environmental conditions, try new strategies to overcome roadblocks, reconfirm or find new motivators.

**Second Month**

*Expectations:* Clients are making progress towards goals, but not as quickly or consistently as during the first month of coaching.

*Situation:* Clients are starting to get bored.
*Approach:* Add variety to Generative Moment discussions and related goals.
**Situation:** Clients are not making their health, fitness, and wellness a priority (including excuses as well as missed and/or late appointments).

**Approach:** Share your observations, express empathy, and inquire as to what could make wellness more of a priority. Share with clients the value of taking small, incremental steps (e.g., how short bursts of exercise are beneficial).

**Situation:** Clients realize that coaches are not magicians and they become disillusioned as to how much work it will take to make changes.

**Approach:** Normalize their experience (everyone goes through this). Emphasize smaller steps. Share with clients you confidence in the process and assist clients to create an action plan that they find engaging and can be successful with in meeting weekly goals.

**Situation:** Clients are not attempting the behaviors they set for themselves as SMART goals on a weekly basis.

**Approach:** Look for what is working in client behaviors in order to set new goals that clients will experience as a fresh start. Probe deeply for inspiring motivators. If situation persists, discuss the matter with a mentor coach to determine next steps.

**Situation:** Client is not at the 50% point of their 3-month goals at week 6.

**Approach:** Reassess three-month goals with your client to make sure they are realistic. Revisit the vision to re-ignite its power. Discuss situation with a mentor coach new ideas for generating success.
Third Month

Expectations: Clients are close to meeting their three-month goals. Some changes are becoming habitual. They feel empowered, on track, and ready for a new set of goals.

Situation: Clients get discouraged by not seeing results in several areas.

Approach: First focus on what is working and on the client’s strengths. Then spend extra time discussing the areas where expectations have not been met and create a plan for improvement. Try different tools and resources. Discuss options with a mentor coach.

The 3-month point in coaching is also a time to review and renew the coaching program. It is a time to arrange celebrations for achieving milestones, consider developing a new three-month plan, modify coaching session frequency, and/or renew your client’s commitment to the coaching program.

Adapt Your Coaching Style to Client Learning Styles

While it’s crucial to help clients develop a vision, plan, and goals that exactly fit their needs, desires, and abilities, it is equally important to develop a personalized approach to coaching that fits their learning style. Test your hypotheses directly with clients as soon as they become clear. For example, you might observe, “I notice you say that you want a coach who won’t let you get away with excuses. Are you saying that you want a firm approach?” You may also want to ask clients:
• Which teachers or managers influenced them to do their very best, and what they specifically did to bring out the best in them,
• What kind of approach or style they prefer, e.g., nurturing, authoritative, or cheerleading (ask them to comment and agree on the approach), and
• What pace and scope they prefer, e.g., jump right in or take a step at a time, provide lots of background information or keep it simple.

Understand Your Clients' Intelligence Level and the Level of Detail and Knowledge They Prefer

The keys to understanding your client's intelligence level include: vocabulary, complexity of sentence structure, depth of questions, pace of understanding, memory, ability to restate their coach's points in different terms, and ability to interpret information, extract points, and see a different twist on the information.

Highly intelligent clients usually want a brisk pace with enough detail and knowledge to help them see the basis of what you're offering. Don't be intimidated by sharp questions or interruptions. Let these help you gauge the pace and amount of information they want. If they interrupt, decide whether the interruptions are requests for more information or attempts to move the conversation more quickly and shift gears accordingly.

Don't assume that highly intelligent clients either know or don't know the material you wish to present. Ask, "What do you already know about...?" or "Would you like more detail about...?" Less intelligent clients may want information presented
using several modalities, such as repetition, examples, and questioning.

Frequently ask such learners to repeat, reword, or apply what you have said. Summaries are extremely valuable tools. For example, ask "What did you learn from this discussion so far?" and "Tell me what you can put into action from today's session." Having them take notes during the session can also be useful for these clients.

**Understand your Clients’ Personalities and What Coaching Styles Appeal to Them**

Some examples of coaching styles that appeal to different personalities are:

- **Authoritative**: These clients want to be told what to do. They appreciate coaches who take charge of the coaching process. Speak with authority and make direct suggestions. That said, it is still important to get these clients to take responsibility and to be in charge of their plans and choices.

- **Nurturing**: These clients want acceptance and a gentle, compassionate approach. Speak softly, express empathy, and ask supportive questions.

- **Entertaining**: These clients respond to humor, witty explanations and analogies, frequent changes in voice inflection, and a quick pace.

- **No-nonsense**: These clients are time-oriented and want information delivered in the most straightforward way possible. They often appreciate lists rather than paragraphs, instructions rather than descriptions.

- **Educator**: Some clients want information – tons of it. You can recognize them by the number of questions they ask. Assist these clients to do their own research with web sites, book recommendations, and other resources.
Working with Dependent Clients

Dependent clients are needy. They need your motivation, structure, approval and reassurance. They are unable or unwilling to take charge of themselves and tend to get off track if they miss a week of coaching. They need so much nurturing that they may exhaust the coach.

Work on ways to empower these clients by reinforcing each positive step they take towards their goals. Give them plenty of praise along the way, especially for independent actions. Openly and directly communicate that you would like to see them continue these new lifestyle changes over their lifetime, not just while they are working with you.

Putting it All Together

You should now be ready to work with clients to develop a vision, set three-month and weekly goals, discuss priorities, motivators, and challenges, and develop strategies to overcome or rise above challenges.

In addition to the checklists provided in this chapter for a longer first coaching (planning) session and for shorter subsequent weekly/biweekly/monthly coaching sessions, see appendixes A & B for additional resources that can be helpful in structuring the process.

Review and Discussion Questions

1. What activities help you get into the coaching mindset? How can you make sure you are in a coaching mindset when you begin each session?
2. What is the coaching contract? Why is it important to the coaching process?

3. What are some possible questions you can ask to find out your client’s strengths and priorities?

4. Give two examples of deep, open-ended questions that take thought to answer and that connect clients with their heartfelt dreams and desires.

5. When should a physician’s clearance and medical data be collected? Why is the collection of medical data important?

6. Explain the statement: “Wellness is much more than the absence of illness.”

7. What is a vision? Give an example.

8. Why is it important to have clients state their three-month and weekly goals instead of the coach noting what was said in the discussion and coming up with the appropriate goal?

9. What should you do if your client doesn’t seem ready or committed to change?

10. What can be expected during the first three months of working with a client?

11. What does it mean to adapt your coaching style to meet your client’s needs?
Appendix A: Client Coaching Program Checklist

1. **Prospect stage**
   
a. Email personal welcome/introduction and articles as appropriate.
   
i. Coaching contract
   
ii. Description of coaching
   
iii. Quizzes/assessments

b. Set up initial telephone consultation

2. **Initial Telephone Consultation (topics to consider, make sure client talks more than you do)**
   
a. Get client to describe why they want to work with a coach
b. Introduce your credentials and background, and passion for helping clients work on health, fitness, and wellness
c. Discuss principles and goals of health, fitness, or wellness coaching, and distinctions from personal training, life coaching, therapy, etc.
d. Discuss behavior change process and client’s readiness
e. Discuss Coaching Contract and three month time-frame for behavioral goals
f. Demonstrate coaching by working with an issue presented by client prospect (see AI & MI Coaching Tools)
g. Discuss fees and payment terms
h. Email articles as appropriate
3. **Program Startup**

   a. If client decides to proceed with a coaching program, ask him or her to complete an assessment
   b. Schedule the first coaching session (allow 45-90 minutes) and identify a weekly/biweekly 30-45 minute time-slot(s) that the client can attend most of the time for the next three months.
   c. Refer client to sample visions/plans.

4. **Conduct First Coaching Session per the Step-by-Step Guidelines**

5. **Conduct Subsequent Coaching Sessions per the Step-by-Step Guidelines**

6. **Three Month Coaching Program Wrap-up**

   a. Discuss and agree on completion of three month goals and progress toward vision.
   b. Discuss how clients can celebrate their success in the past three months.
   c. Ask clients for honest feedback on the coaching program, including what was most helpful and least helpful.
   d. Ask clients to complete a feedback survey.
   e. Assist client to determine what she or he wants next, and whether to proceed with a coaching program for another three months.
If the client decides to stop the coaching program at three months:

- Discuss reasons for client choosing to stop.
- Celebrate their learning and remark on what they may want to consider next.
- Encourage clients to keep making progress and to let you know how they are doing.
- Ask if you could check in with them from time to time.
- Thank them for being a great client and for helping you to learn.

7. Incomplete Three Month Coaching Program

a. Ask client to complete a short feedback survey.
b. Discuss reasons for client choosing to stop.
c. Celebrate their learning and remark on what they may want to consider next.
d. Encourage clients to keep making progress and to let you know how they are doing.
e. Ask if you could check in with them from time to time.
f. Thank them for being a great client and for helping you to learn.
Appendix B: Coaching Program Feedback Survey

Coaching Program Evaluation

Coach’s Name:  
Client’s Name:  
Coaching Start Date:  

Please rate your coach’s competence on a scale of 0 to 10: 10 = Very Competent; 0 = Very Incompetent. Please feel free to add any comments.

<table>
<thead>
<tr>
<th></th>
<th>Rating</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Helpfulness:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Empathy:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of advice:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of instruction:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motivation provided:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Effectiveness:

Other comments:

Areas for improvement:

In what ways has coaching benefited or changed you the most? Describe “before” and “after,” if possible.

What goal is most important to you now?

Please comment on how coaching has benefited you in any of the following areas:

Confidence:

Motivation:
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy</td>
<td></td>
</tr>
<tr>
<td>Work performance/productivity</td>
<td></td>
</tr>
<tr>
<td>Exercise habits</td>
<td></td>
</tr>
<tr>
<td>Eating habits</td>
<td></td>
</tr>
<tr>
<td>Sleep</td>
<td></td>
</tr>
<tr>
<td>Stress management</td>
<td></td>
</tr>
<tr>
<td>Life satisfaction</td>
<td></td>
</tr>
<tr>
<td>Self-esteem</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Health:</td>
<td></td>
</tr>
<tr>
<td>Life satisfaction:</td>
<td></td>
</tr>
<tr>
<td>What are your coach’s best qualities?</td>
<td></td>
</tr>
<tr>
<td>How could your coach improve?</td>
<td></td>
</tr>
<tr>
<td>How does your coaching experience differ from your expectations?</td>
<td></td>
</tr>
</tbody>
</table>