Coaching Process for the Coach Guidelines

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I offer the following to support you coaching in the group environment. You will customize based on how your client comes to the session and what happens in the session. **I've written general questions; please customize using client words and concepts.**

This process is also what you can use for coaching your own clients (with adaptations).

Group environment process

The coach of the day, and I, will be waiting on camera for the client to arrive. All other participants are off camera, with first names only (pronouns welcome). I will welcome the client into the zoom meeting, check their sound and safety (i.e. that they are not driving!). Then hand over to the coach and I'll turn my video and audio off.

There will be a 35-40 minute coaching session. I won't intervene during the coaching unless the client seems to be getting frustrated because there is a mismatch between what client is saying and how coach is responding and this is occurring more than a few times. I may write one question privately in zoom chat to the coach, as a way to support. If that doesn't work, or coach doesn't see it, I may then intervene in the coaching to ask a question or support the coaching to come to a close. If you then allow me to close out the coaching session.

I may offer one question per coaching session to each coach in private chat, as a way to support.

Cultivate Trust & Safety

Connect human to human

The first important thing for the coach to do is connect with the client as a person.

For example, you can share where you live and ask where the client is zooming from. You can ask about their weather, or something you see in their background. Or inquire such as, "How is your energy as you are coming to this coaching session?" Ask or say

anything that is going to give you both an opportunity to connect. Then listen and learn how client responds. This will give you an opportunity to calm your nervousness, if you have any coaching in the group. If you go directly to, "What do you want to focus on in this session?" before connecting, it can sound process oriented and disconnected.

Ways the coach demonstrates trust and safety throughout the session includes:

- By allowing the client to fully finish speaking before coach begins to speak. (i.e. not interrupting or speaking over the client)
- Listening for the words the client uses and incorporating those words into coach's questions and comments
- Listening for client strengths or values and observing those to the client
- By using client learning preference, such as visual concepts, metaphors, sensing or feeling preference
- By offering supportive comments to the client
- By acknowledging client progress in the coaching session

Establishing the Coaching Session Agreement

All coaches in the group will have received a copy of the Volunteer Client Intake Questionnaire, where the client has named their desired outcomes for their coaching. Coach can refer to their questionnaire and ask about anything they wrote that feels appropriate to ask about, which may naturally have the client say what they want to talk about in this session.

The coach asks open-ended questions such as:

- What is your topic for this coaching session?
- What is your desired outcome regarding your topic?
- What's important to you about this topic or outcome? Or, why is it important to discuss today?
- What do you feel needs to be explored in order for you to achieve your desired outcome?
- How would you know you made progress or achieved your desired outcome? (known as a measure of success). For example, if they want a plan, or strategies, what will that give them? It's likely what the client really wants is clarity, confidence, peace of mind… and a plan or strategies is the means to getting that.
- Coach summarizes or paraphrases back what they heard the client say to the above questions, to ensure shared understanding. When the coach summarizes

back, client may have further clarity about their session focus, outcome, etc. so this might be a repeat process until client is happy with the session focus, etc.
- If the client isn't completely clear on any of the above, then just do you best to work with what the client gives you.

Partner with client to allow them to choose session direction

After coach has confirmed the session focus, outcome, what to explore/address, and measure of session success, Coach now Partners with the client to ask the client to choose where they want to begin exploring. Let client choose direction not coach.

Partnering question options include:

- Now we've clarified what you want from this session, what would be most beneficial for you to explore first?
- Now we've clarified what you want from this session, what feels important to explore now?
- Now we've clarified what you want from this session, how would you like to explore? (this is especially relevant is client is sensing, feeling or imagining as they may want to explore body knowledge, their feelings, or even their metaphor or visual imagery.
- Coach may also offer options based of where to explore based on what client already said. For example, "You've mentioned x, y and z, which do you feel drawn to explore first? Or does something else come to mind?"

Discovery Phase

Keep the client desired outcome/s in mind in the discovery phase, as the intention that discovery supports the client toward their desired session outcome.

If client is speaking about something that seems different than your understanding of the coaching focus, then ask the client such as, "How does what you just shared relate to your desired outcome of xxx for this session?"

The purpose of the discovery phase is for client to gain awareness about themselves and their situation/s.

We have a variety of coaching skills available to support client discovery.

Core Competencies involved:
#5: Maintains Presence – curious, responsive, present with the client, attends to client agenda.

#6: Listens Actively – what's going on in client situation, beliefs including conflicting beliefs, energy changes, vocal changes, expressed values, strengths, where the client is stuck, inner or outer conflicts, emotions present, sensations present, feelings present, perceptions, inquire about meaning of words client uses.

#7: Evokes Awareness by asking Questions – open-ended, one question at a time. Allow space and silence for client to reflect and respond at client pace.

#7: Evokes Awareness by offering comments and observations – succinct, one comment or observation at a time. This can include use of client visual language, metaphor, physical sensations or body/facial changes.
Coach mindset is that of curiosity and learning about the client, in order to customize questions and comments/observations using the client words and concepts as much as possible.

Managing Session Progress

Generally, it is recommended to check in with client on their progress made during this session, at least once near the end of the coaching session. This directly links back to the session agreement established in the beginning of the session.

If you can also check in during the coaching session, that is good because you can hear if the client is getting what they want from this session, and have some time to course-correct or adjust if necessary. However, if the clarification of the session agreement took some time to do, then checking during the session may seem unnecessary; trust your intuition on if and when to ask about progress during the session.

If the client is deeply exploring, reflecting, or expressing emotions, then checking in could seem to be disconnected and is not advisable, as it will seem more process oriented in service of the coach and rather than in service of the client. Instead, wait for the best timing.

By checking during the session on progress client is making toward their desired outcome, the client to pause, reflect on their progress, and determine what else to focus on to support movement toward their desired session outcome.

Sample questions to ask during the session, about half way of so, if it feels appropriate:
Given you wanted to explore xxxx, how is your progress so far toward that outcome?

With 5 minutes remaining in the session:

The coach will receive a "5 minutes" message in private chat from me, to let the coach know to begin to move to the "Facilitates Client Growth" part of the session, if this hasn't already naturally began to occur. In fact, Facilitates Client Growth may occur earlier in the session as client gains awareness and considers actions.

Core Competencies involved:
#8: Facilitates Client Growth – ask about client progress made, and learning experienced.

#8: Facilitates Client Growth – ask questions to support client design post-session actions.

#8: Facilitates Client Growth – partner with the client to close the session.

This is where coach allows the client to consider:

- Progress made toward their desired outcome and or their measure/s of success
- Shifts they experienced; compared to where they began the session
- What the client learned about themselves (other words to use are insights, awareness, or discoveries)
- Ask about actions or next steps. Then ask further follow-up questions as appropriate and if time available, such as about what support, resources, commitments, any anticipated challenges/barriers to following through on their desired actions, commitments, or how accountability works best for them.

In general, for the group session coaching sessions, when there is 5 minutes to go, please go to process. You can partner with the client such as, "We have 5 minutes left to begin wrapping up the session. Are you okay to move toward progress, learning and

actions? (In truth, the client won't say no, so this is a leading question and more about preparing them for these next questions).

- At the beginning of this session, you said you wanted xxx from this session. Where are you now with xxx versus where you began this session?
- What learning has occurred for you in this session? OR something similar wording. (examples: What's shifted for you since we began this session? What have you discovered? What insights do you have now? What awareness have you gained about yourself?)
- How will apply your learning after this session?
- What actions do you feel ready to take forward?
- What support or resources would help you take those actions? You can ask about accountability if it feels right, but refrain from inserting yourself as accountability. Let client ask you if they want you in their accountability process. Let them choose who, if anyone will support them in their own network of people.

Close the Session

Verbally acknowledge client progress by noticing what is different about the client at end of session from beginning of the session. Or acknowledge client participation, openness to explore – whatever feels authentic for you to say that recognizes client work in this session.

You may hear the client energy is different, such as client is speaking faster, slower, or their energy seems easier or more free. Perhaps you can acknowledge client for having more clarity.

Ask the client to close the session

Let the client say the last words in the session by asking them;
"What would you like to say to close the session?"

Thank them for being the client, and you are done!

