Distinctions on Establishing the Coaching Agreement

The purpose of the coaching agreement for each session is to help the client to create a meaningful gap from where they are now to where they want to be, and to know how they will measure success toward their desired outcome by the end of the session.

Following are elements to explore in each session. Some elements can form the session agreement and some (such as underlying issues) may come out during the session as part of closing the gap to the desired outcome. So you may come back and create an additional part of the agreement when something more arises.

The coaching agreement is dynamic in that you are coaching the client to clarity on their topic, outcome and measures of success. Be present to the human being of your client and seek to understand. You don't need to have the agreement 'done' within 2 minutes. In fact, you've probably missed the opportunity to create a richer Who + What agreement with the client. It may take 10 minutes of a 30-40 minute coaching session to get the agreement, but don't quote me on that! It could be more or less time. As long as it's clear you are still exploring with the client to get the clarity of what they want to accomplish, you are likely adding value to the client because you are already coaching them!

The mindset of the coach is grounded in Coaching Presence. Be present to what the client says and how they say it. Notice what is implied or you sense in their tone or energy. During the initial 'hello' the client may say something that seems off-the-cuff, or you notice their energy is high or low. So be attentive and curious from the very first moment and make observations to the client of what you are noticing, without interpreting what that might mean.

Be curious about 'What' the client wants, and clues as to their 'Who,' because it's their mindset, beliefs, perspective, emotions, values, desires, etc. that likely need to be included in the coaching session agreement in order to move toward their 'What.' An effective coaching agreement will address both the Who and the What, and likely also the How.

Here are the components of the coaching session agreement for each session.

Fieldwork - What – Success – Why - Gaps/Barriers/Underlying Issues

A great session agreement will include:

1. Follow up on fieldwork. How did the client go with taking their **actions and commitments since the last coaching session?** Note: Some clients might not want to start with this so please partner with your client on where they want to begin.
2. What topic or topics does the client want to **address in this session?** In regard to each of their topic/s, what do they specifically want to **accomplish by the end of this session?**
3. Success. **If this coaching session is successful**, what would need to have happened for the client? How will they measure success or progress toward their desired outcome by the end of this session?
4. **Why is this topic, and/or outcome important to the client?** Why is it important now? What is meaningful to you about this topic? What is driving this outcome you want?
5. What **gaps, barriers** or **underlying issues** might need to be addressed?

MORE ON EACH COMPONENT

1. **Follow up on fieldwork.** While one of the first things you might usually do in a coaching session is inquire into what the client has accomplished since the last coaching session, some client's might not want to start with fieldwork because something is more important for them to talk about today. So you could ask the client where they'd like to start today. If client wants to talk about fieldwork, let them talk about their experience with taking their **actions and commitments since the last coaching session.**
   However, in the spirit of Partnering with your client, check with them if that's what they want to do. For example, you can ask, "We can start with checking in on how you went with your actions from last session, or we could go straight to a topic for today. What's most important to you?

   If they want to talk about what happened since last session, and actions, then you follow the client lead. Listen for and genuinely acknowledge what they were successful at. What didn't they get done? What stopped them? Support them to find what was behind the lack of action, without judgment.

Exploration of actions taken and not taken may uncover an understanding of what the client wants from this coaching session. Or it may be a completely different topic that the client wants to focus on. Inquire of the client as to what they want to focus on and accomplish, rather than assume you may know.

2. **What topic or topics does the client want to address in this session.** There are two parts. **One is the topic**, the other is **what the client wants to accomplish around that topic.** What does the client want to focus on in this session? This type of general question usually opens the door for the client to say a number of things that are on their mind. Listen, inquire, and be curious to understand. Notice what the client says and how they speak. What seems most important to them? What is their tone of voice or manner of speaking potentially indicating? What emotions are present? Make pure observations, without interpreting what that may mean (from your beliefs). Let the client make their own interpretations and connections.

   Accomplish. In regard to each of their topic/s, **what do they specifically want to accomplish by the end of this session?** The topic they bring is not usually the outcome they want. For example, the client may say they are having an issue with a member of their team. That's their topic. What's the outcome they want? To prepare to have a conversation with that team member? Or is it something else? Listen and inquire into the end result they want in regard to their topic, until you and/or they have enough clarity to proceed in the coaching session, using this information as your compass throughout the session.

3. **Success.** If this coaching session is successful, what would need to have happened for the client? Here are samples questions you can ask to ask about success.

   How will they measure success or progress toward their desired outcome by the end of this session?
   If this coaching session is successful, what would need to happen (and add in client specific language as well)?
   What would you like to have by the end of this session that you don't have now?
   What do you want to take away with you by the end of our session?
   What would we need to have done in this session for you to consider it a success for you?

You can create more than one measure of success for the session (e.g. come up with strategies, role-play in preparation for a challenging conversation, uncover possibilities, discover blocks to getting something done, have a plan for how to proceed, etc.).

4. **Why is this topic, and/or outcome important to the client?** Why is it important now? What is meaningful to the client about this topic? What is their bigger vision or bigger picture?

   Remember that a client only has a 'problem' because there is something else they really want. So find out what they really want and make that a foundational part of the session agreement. Or refer back to your Coaching Plan or development goals for the coaching engagement. Where does this topic for today's coaching session fit in that plan or their bigger goals? What's the outcome the client is really seeking to be able to have, beyond this coaching session. What would [this situation] look like in their ideal scenario? Help your client to articulate what their true vision/ideal is and how today's session will help them achieve that.

5. **What gaps, barriers or underlying issues** might need to be addressed? This is where the real value of a coach kicks in. We often can't see what gaps or underlying issues are stopping us from getting what we want. We call this the "Who" of the client. Listen for internal barriers not just external barriers.

   You are more likely to hear some barriers, which are usually external and environmental (their 'What'). But the real (underlying) issue may be internal, such as a belief, their mindset, their habits, their past experience, their fear, their experience level, their preparedness, their expectations, and so on.

   You might hear some gaps, barriers or underlying issues as the client initially talks, or you may hear them as you continue into the coaching session. But near the beginning, it's worth listening for if it's an appropriate time to ask the client something like, "What do you perceive underlying issues might be that need to be addressed?"

   You may need to ask more questions about their vision or ideal. Refrain from stopping at what problem the client wants to solve (the What). Continue exploring until you know what the client wants to have happen. For example, "What do you really want in this situation?"

to establish where they want to be, followed by "What might be getting in the road of you achieving this?" to start to uncover gaps, barriers or underlying issues. Then the barriers become placed in their proper context: they are simply things in the road of getting what the client really wants. And yet it you don't address the Who component, getting their What may be even more challenging.

OTHER ELEMENTS OF THE COACHING AGREEMENT TO PAY ATTENTION TO

RE-CONTRACTING. During the coaching session, you may notice a new topic or focus is brought up by the client. At any time, you can make the observation to the client when it seems they have moved to a different focus/topic. You can make the observation and ask, "This seems like a different topic or direction than we've been heading in or maybe you see it as part of it?" "How does this relate to what you said you wanted as an outcome for this session?" If it is a new topic then ask something like, "Would you like to shift to this new topic or stay with the original focus/topic for the session?"

This is called "Re-contracting" with the client during the session, and helps the client to think about what is most important to them, now. And what's most important to them may change as the session progresses.

CHECK-IN DURING THE SESSION. At any time during the session that it feels right to do so, ask the client if the coaching is moving in the right direction and toward achieving their desired outcome. Do this at least once, no later than halfway through your session, and more often is fine. For example, "I want to check with you…is this conversation helping you to move toward your outcome/s for this session?"

By asking this question during the session, you may find that you are not heading toward the desired outcome, in which case, you can refocus on what's important to them. And often by asking, the client tells you what they are becoming aware of, which may lead to confirming actions they are going to take (you don't need to wait until the end of the session to confirm or inquire about actions that are arising for the client).

CHECK BACK SPECIFICALLY AGAINST THE AGREEMENT AT THE END. At or near the end of the session, have the client tell you what they actually received from this session against their desired outcome. Make the client responsible for telling you, rather than you articulating the agreement, so the client feels more empowered and takes more ownership for their coaching session. For example, “Can you recap; what did you want from this coaching session and what did you actually get?” This will also train the client to be listening for the agreement in future sessions and they may start articulating what they received from the session before you ask. Notice that this is a different question than “What are your takeaways from this session?” which does not directly check against the coaching agreement.

WHAT’S LINGERING? At the end of the session, you can ask what is still lingering in their mind that didn’t get addressed. Be willing to ask a question such as, “Is there anything still on your mind that we didn’t cover today?”

Sometimes the client will then create actions to help them work with lingering thoughts. Or it might be that they bring some of those lingering thoughts to the next session. Or they might have moved to a completely new place by the time you have your next coaching session.

GIVE THE CLIENT THE LAST WORD IN THE SESSION. Part of the coaching agreement is how you end the session. Rather than you saying a lot, even if it’s a lot of encouragement, give the client the last word in the session by asking something like, “Is there anything else you want to say before we end this session?” This also demonstrates Partnering with the client (a key concept in the core competency of Coaching Presence)

Carly Anderson, MCC, is an active ICF Assessor and has a passion for advancing the professionalism of coaching and believes that can be done through ICF core competency development. She has a vision of supporting 1,000 new MCC coaches by 2020.

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