

Writing a Core Competency Worksheet (CCW) transcript

Carly (00:01): Hello, this is Carly, and I'm here with Henry, will introduce Henry in a moment, but just to know that this is a learning resource for you, and the intention is to give you something that will make it easier to fill in a core competency worksheet. But before we go on, I'd love for Henry to introduce himself.

Henry (00:23): Hey, good morning, Carly. So, I'm Henry Dumas. I'm a PCC level coach. I'm part of Carly's metric coaching group, um, with aspirations for MCC. I really haven't done the core competency worksheets. When I got to this level it came time to do those, I was on a bit of an overwhelm, had lots of good questions. And so, I thought it might be helpful to interview Carly and to interact and with a hope that that'll help other aspiring coaches in terms of their certification and to see what's important, so.

Carly (01:08): Thank you so much, Henry. When you came to me and said "This is missing, could you do something?" I was a bit of a loss how to do it on my own, and I did record something. But this is going to be a little more robust, and we're going to do a little more than just the basics here, so thank you so much for being here with me and supporting this process of learning for others as well. So, where should we begin Henry?

Henry (01:35): Well, we might start with a first question I had, which is so why is, why is this important, to self-complete a CCW worksheet? Why am I doing this?

Carly (01:45): Yes, that, that is a really good question, the why? Well, the CCW, core competency worksheet, is an opportunity to learn more deeply about the core competencies. There are two different versions of the worksheet currently, and I use one version for the MCC preparation mentoring group, and then I have one that I use for the ACC/PCC. I'm going to be covering both of them in this. But the real purpose is to really understand the core competencies and the ability to tease out the core competencies using the PCC markers. The PCC markers are the fundamental process we currently have from the ICF to understand the behaviors of the core competencies. They do form the foundational for MCC, and there's a minimum level of them, this is not official from the ICF, that if you demonstrate those, you'll get ACC. So, you will see the commonality of the PCC markers through the both forms.

But the whole reason is really to deepen your understanding and learning through listening to a recording, filling in a core competency worksheet, and then sending it to me because every one of the core competency worksheets you fill in, I have one for in the members-only pages. Or in the group environment, when there's been a coaching session in the group, I do fill in a core competency worksheet, you can fill in yours, send it to me and I can send mine back to you, so it's another way of learning at a deeper level.

Henry (03:24): Perfect. So, one of the things that I've struggled with a little bit is the history of the core competency worksheet, with the various levels, at a high level, the scoring methodology, and how to really get my arms around what an ICF assessor might be looking for.

Carly (03:49): Yes, I'm noticing you've had some little rings there in the background Henry. So, when you're not speaking, we might put you on mute. And, um. . .

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Henry (03:57): Yeah, I apologize for that.

Carly (03:58): That's alright, no problem. I know you're in your office. There we go. Yeah. So, a high level, um, I lost the thread of the question.

Henry (04:15): So, so I'm trying to get an idea in terms of the history of MCC, PCC, ACC, again at 30,000 feet, where does CCW come from? What's an ICF assessor looking for? What are some of the distinctions in terms of rating at a high level, so that you've got kind of began with the end in mind, when it shows up to an ICF assessor like you, who has been doing this for 10 plus years, what does that look like?

Carly (04:56): Yes, right, thank you. Okay, so I'll start with because I am an assessor for ACC, PCC and MCC. So, there's two different systems currently in place with the ICF. There's a zero to 10 scoring system for ACC and MCC. And for ACC, you need to have a minimum of 2.9 average across the core competencies. Now, with PCC, there's a marker system, and you have to have a minimum number of markers in each core competency. And the general rule of thumb, even though this is not all of it, is that at least half of the markers in each core competency need to be demonstrated well, you know, that you can recognize those, in order for that to be a pass. There are some other distinctions, but if you just think, okay, if this 47 markers, 24 minimum over the, actually there are only eight competency groups, there are 11 core competencies, but the way that the ICF now assesses is we don't assess ethics unless there's an ethics issue, then we have to name it, but we still have to assess the whole recording anyway.

So, the ethics issue could be about being out of the role of a coach, which is role confusion. Or it could be that there is something that the coach is missing that is really not about coaching, like coaching the client around an addiction, or long-term weight issues, and there's emotional challenges, or there's abuse or discrimination, or whatever going on in any form in any environment.

So, you need, we don't assess those in this form or as an ICF assessor. However, you do need to, that will make it not one that will get passed if there is an ethics issue. So, we don't assess that, but we do assess 2 through 8, and then 9, 10, and 11 are now one grouping. So, that's planning and goal-setting, designing actions and managing progress and accountability. So, you have to have an average of 2.49 minimum to pass ACC. And you need a minimum 8.0 average to pass MCC. And you need a minimum of at least half of the of the PCC markets across, distributed evenly, so you can't just have all of them in one core competency and none in another, in the PCC markets. So, the whole purpose of then you doing one in the group sessions or in the mentoring is to really understand the core competencies enough to keep growing your skills, to keep recording and be ready to put in your recordings for your process with the ICF.

Henry (07:52): Thank you, Carly. So, one of the things that was a struggle for me was, and you've done more the CCWs than I hope to ever do. But, but you got a strategy and you've got a, kind of like, how do I get from beginning to end? What is like from a how do I break this down into bite sizes? How do I, what do I do first and second? Without too much detail just

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paint a path forward for this process, if you will, from coaching session to CCW completion. What works best for you?

Carly (08:40): Yes, I think that's really the key is how do you navigate one of these forms? Because when I first saw it, when I first went through the PCC marker training, this is where I first encountered this type of form. And it was overwhelming for me. So, I totally understand that. So, the first thing that you have, with all of, pretty well now all have the recordings in the members-only pages, are a transcript as well, you have a transcript of each. That is so helpful so that when you listening to any of the recordings in the members-only pages, also download the transcript, and you can copy and paste from that transcript then. It is a PDF, sometimes some of you may not, they are accessible to copy and paste. If you can't, then there are ways through Adobe that you can actually make it into a Word document, but I need to put them PDFs because of the WordPress issues I have with Word documents. So, copy and paste each piece of evidence into the worksheet.

So, if you take one piece at a time, when the client first starts speaking, you listen for what the client is saying, and then how the coach responds. That's a key principle for any assessing. The coach is in response to what the client is saying, No longer is the assessing about how great the results were for the client, although, of course, that's nice to have. But for assessing, we're really assessing the client in (INAUDIBLE:10:17), and what the client is saying, what the coach is then doing with that. So, what the coach is responding with could be really excellent question, and the client does nothing with it. That doesn't mean it wasn't an excellent question. Doesn't mean it wasn't a responsive question. So that's why you want to listen for what the client is saying and really pay attention, read the transcript, listen to the recording, stop it if you want. And then okay, so the first thing is coaching agreement, or it could be about understanding, clarifying what the client says.

So, there could be many places, it could be about being curious about the client. So, you take one thing that the coach said, then see where it might belong in the core competencies. So, you think, "Oh, that's a powerful question." Now, under powerful questioning, what type of question could it be? Could be a belief, it could be about the who, the what the situation, the ideal. So, then you can paste it in various places. The whole purpose is not to have to complete one of these so thoroughly that you have a 27-page document, as much as do you recognize that this coach understands that skill, and that skill is further teased out in the PCC markers. How's that Henry?

Henry (11:44): That's very nice. Thank you. One of the things I struggled with as a coach, I am so focused on what the coach is saying that when I began to listen to myself or others for this CCW, it's like I didn't notice what the coach said because I was so deep in the well with the coachee. So, from a mindset standpoint, how do you shift that back and forth so that you're able to, or the coachees say, "How did the coach respond to that?" I didn't, maybe it's my brain, but it didn't flip that well, going back and forth.

Carly (12:20): Yeah, that's where you just need to stop the recording and/or read the transcript, and then notice what the client said. And then notice what the coach responded with. Notice

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what the client said next, notice what the coach responded with. It does take practice to do both. Because just listening to what the client says is not going to give you really the coaching skill used. So yeah, it's just a shift. And the other thing is that, as you listen more, you'll start to hear the different components. So, for example, when the client says as part of what they want from this session, the coach may ask, "What do you want as an outcome from today's session?"

So, I'm thinking, "Oh, that's coaching agreement." Now, it's also a clear, succinct question. But I'm really at this point paying attention to coaching agreement. Now I'm noticing what the client says. And then the client may initially say, "I really want to understand what's going on with my team," then they'll give an explanation about what's going on. But the first thing they say is often really important. So, paying attention to when the client says things like, "I don't know how to work with my team," or "I'd like to understand," then notice how the coach responds to that. So, the coach may reflect back which is an active listening skill. The coach may ask a further question about it. But it's all in service also of establishing the coaching agreement.

So really pay attention to the coaching agreement, and how that's unfolding and what the client is saying and how the coach is responding, because that's going to really set the scene for the whole session. If that takes 5, 10 minutes in a 30-minute session, or 10, 15 minutes in a 50-, 60-minute session, that's fine. And maybe also demonstrating many other competencies: active listening, powerful questioning, curiosity, in coaching presence. So yeah, you just need to be sort of paying attention to both, because both are important. What the client is saying is important, then what the coach does in response is important. But what we really are assessing is the coach's ability to respond with a coaching skill to the client.

Henry (14:57): Understood. Thank you. So, as I said, I am a PCC level in pursuit of MCC. So, as I gain clarity around what does MCC mean, and the 10 characteristics, help me to understand how we begin with the PCC markers. We've got to have overall 8.0 out of 10 for that, but I've also at 10 characteristics, and I'm not sure how an ICF assessor looks at. Is the 8.0 like minimum and then we've got to how these 10 characteristics fold into that before you feel like I am truly MCC or not a PC or an ACC? Give me some concept in terms of what to look for, what that looks like.

Carly (15:48): Yes, such a good question. Okay, it's going to be a longer answer. So, the PCC markers are not used to assess ACC or MCC. They're only used to assess PCC. However, every ACC and MCC assessor is also trained in the PCC assesses as a foundation. We all have that as a foundation. There are no ACC at this point markers, and there are no MCC markers. So, the PCC markers are there because the majority of coach training programs are catering to PCC school level. And they do have a ACC level, but they really are, that's where they go for coach training. So, know that you're not being assessed by an MCC assessor for MCC using the PCC markers. However, as an assessor for MCC, that is the foundation on listening through. Does the coach understand how to set the coaching agreement? Does the coach understand how to listen for the, now the difference is the who versus the what for MCC.

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So, the 10 characteristics of MCC skill level are my characteristics, they're not the ICF characteristics. And what I've done is over my 15 years or whatever of assessing and my own coaching, and then recognize that there are these, this is what makes the difference overall from PCC to MCC is the connection, the presence, the amount of partnering, the spaciousness, really the emotional content, the whole person and being able to work with emotional content, the simplicity of questions and comments, the ability to ignore nothing, which means to be hearing what the client may be contradicting themselves with, conflicting information about themselves, and then the coach's ability to offer back to the client where they hear some things that may not be, well, may sound to the coach incongruent or conflicting, but may not be to the client. Then to trust the process, trust our own process, trust the client, trust the coaching works, vulnerability and being open to being human and to expand learning. So, I've just, there is actually for everybody, doesn't matter what level you're going for, I've got a blog article on these 10 characteristics that everybody in the public eye can find.

So, the reason I have those there is because for MCC skill level, there is a document that's 12 pages long from the ICF, and you have access to that as well. It's 10 minimum, MCC minimum skills level requirements, it's really dense. And I do overlay those in the group sessions, I make some distinctions using some of the key skills evaluated by core competency. However, it's, I'm trying to sort of pass it and make it easier to understand. So, that's why when you listen to a recording and you're assessing something, and you, at MCC skill level, you can also at the end of that, after you've listened to the whole recording, then go to the 10 characteristics and go, "What was the level of connection, presence, partnering, spaciousness?" So, you really do this at the end, because it's really, that's all about the coach's presence and their ability to be more present with the whole person of the client and demonstrate a higher level of mastery. How's that, Henry?

Henry (19:31): That's very good. Thank you. So, I'll tell you just from my journey, that while the what is important, the who is transformational, and so transformational coaching is definitely about the who.

Carly (19:46): Yes.

Henry (19:48): So I, talk a little bit about, back to the PCC markers and this rating system, I struggle a little bit with when I've got to transcription that supports one of the markers, 5.3, 5.4, but it also fits other markers. How many times am I putting this down that relates to the various markers? How do you get a sense for what's an 8 versus a 6 versus what's a 4 from the PCC marker system? I mean, the numbers are a mystery still somewhat to me.

Carly (20:29): Yeah. Yeah, so for those listening that are doing ACC and PCC skill level, you're really just dealing with the PCC markers. And then, when you get to MCC skill level, there's an overlay of well, the overall core competency, not every single marker, but overall, that core competency, was that at an 8 or above, or was it below? Because that's really what we're assessing. Is it an 8 or above for each core competency for ICF's purposes of assessing? So, I don't think you should worry about that generally to begin with, is the scoring system, as much as can you hear evidence of coaching agreement? Can you hear evidence for coaching

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presence? Can you hear evidence in each one of those, to try and understand at the level that I have, it took me, it took me months and months and probably a year to really understand this at a really deep level. So, I don't expect that from each of you. What I recommend you do is take it a bite at a time and go "Okay, I'm really going to focus in on coaching agreement and listening for that, then I'm going to go to presence." Trust and intimacy is one like you hear at the end overall, was the coach really attending to the client's agenda? Were they being supportive in the way that they asked open-ended questions? How were they being with the client? But then take the next core competency and really focus in on that.

But the main thing I really asked you to do, especially at the beginning is yeah, listen to the recording. Start to put a little bit of evidence in, just build as you go through because you get to do a number of these over the course of the program, but go to the bottom of the form and give your integration thoughts there, meaning strengths, what are some strengths that you heard? So, you can name a core competency, and then what are some strengths? And what are some upgrade or development opportunities? And then of course remember, you're going to get mine when you send me your worksheet, you're going to get mine, so you can see what I wrote. If you have any questions, I always say put them at the bottom of the CCW, not throughout the CCW, because then I can easily see what questions you have for me and I can answer those. But take it as an iterative process rather than "I have to get everything right about this." Just trust that it's a building process over the period of the program. I think that's probably what I would recommend Henry.

Henry (22:53): Thank you, that's helpful. I noticed that some of those PCC markers lend themselves to a yes or no. Can you talk a little bit about which one of those markers lend themselves to that, and why?

Carly (23:08): Yeah, you're right. So, much like with I said the 10 characteristics, you wait until the very end to decide, well, have they been demonstrated consistently throughout the session by the coach, at any level, what you really maybe some of these, you don't need to write specific evidence, but I would say more evidence against. So again, that's the other system here in place for scoring from the assessing point of view is there's evidence for, and then contra or counter evidence against. So, for example, under coaching agreement mark of 5, "coach continues conversation in direction of client's desired outcome unless client indicates otherwise," you have to listen to the whole session to know if the coach has done that. If the coach has shifted the direction to something else, or did not follow what the agenda was for the client, then I, that's counter evidence, and I would make an observation. I would make note of that, I would either write the time if I have a time, or I write the actual piece of what the coach said that, and maybe even what the client said, just for me to know. So, that's one of them, No 5.

And then same with really "creating trust and intimacy," there may be specific acknowledgments, there may be specific support. But we're really listening for the whole of the session before making an observation about whether they, that's, at what level that's scoring at. For "coaching presence," pretty well all of them you're really listening for specific. . . "Curiosity," No. 4, has to be present throughout, number of times through the session, so that's

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more of a once you hear it a few times, if it's counter evidence where basically the coach's point of view is more important than being curious about the client's point of view for instance.

“Active listening,” again, I would say mostly No. 7 is one where coach is quiet and gives client time to think, so you have to listen and wait for the whole session. So, the interruptions would be what I would pay attention to, how many times and I'd make note of that. If it's only one or two times versus 20 times, then that's no, that coach isn't quiet and gives the client time to speak and think, time to think.

“Powerful questioning,” again, the same thing. No. 5, “clear, direct, primarily open-ended questions one at a time,” you'll know by the end of the session whether the client uses, “the coach uses a client's language” is No. 6. And “the coach's questions are not leading.” So, if the majority of questions are open-ended, then you would mark that marker, if there's, which means they're not leading if there's one of those weird ones that's written. And then “direct communication,” there are quite a few, so 3, 4, and 5, you would wait until the end, and 6 even. Notice again interruptions, and often No. 5 in “creating awareness.” If you hear multiple open-ended questions that are customized, that's going to let you know. So again, I make evidence there. But you could wait until the end to decide, but I definitely put evidence there. So, they're the main ones and the rest, you really have to just pay attention to the actual evidence for or against.

Henry (26:22): Thank you.

Carly (26:23): A lot of information there, but . . .

Henry (26:25): No, but it's good information, it was a mystery to me anyway.

Carly (26:30): Yeah, I'm noticing our time here, Henry, so we sort of had a bit of an idea of how long we wanted this to go and we're getting nearer to the end of that. So, what else do you feel needs to be covered?

Henry (26:44): Well, from your experience and global standpoint, what else is important to know in terms of the CCW? How to start? How to have a mindset? How to be kind and gracious to yourself? Just gets started, and how to leverage the resources that you provide to get better?

Carly (27:07): Oh, that's such a key statement – “How to Be kind to yourself in this process?” because some people have perfectionist and want to get it right, and this is not a place to start to try and get it right. There's too much to learn, too much here. You will get it over time. I think the one thing that hasn't been talked about yet which is when you do your own recordings, you won't have a transcript unless you pay for one. I don't, many people sort of type up their own and that's great, but that's very time-consuming so I personally don't do that. What I tend to do is go to Temi.com, or some people use Sonix.ai, or even Transcribeme.com now has a voice recognition component, where I use Temi.com because I can take a recording of a coaching session, and you can do this for yourselves, I can have it within five minutes, I can send it to Temi.com, pay 10 cents a minute. So, for a 50- minute coaching session, it's \$5, I'm prepared to

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spend \$5 to have, and it's probably going to be 80% accurate, or maybe 70% accurate. But because I'm really paying attention, listening to the recording, and then I know what I'm listening for, "the coaching agreement, okay," I can, I can adapt, so I'm not really using the transcript as a full transcript. I'm using it to copy and paste into a CCW.

So, that's great for the learning process for you as well. And I recommend using a service like that. And then when you get to your final recordings to send to the ICF, which I'll help you support you in determining which ones, then you want to get a better transcript which can be through Rev.com. It can be through Transcribeme.com, and there's other places as well. So, the first thing really to do is decide whether you want to get a voice recognition transcript for yourself as you're doing your own recordings. And that can help a lot with this process, because you will send me your own CCW with your own recordings for our mentoring process as well.

Henry (29:16): But I will say that I did use the Temi, a very user-friendly, and the changes if you have a little perfectionist and you want to make them, very easy to make global changes, and to listen, and it walks you right through that. And they gave the first one to me free. I appreciate that. But it's a bargain at 10 cents a minute, so.

Carly (29:40): Yeah, it really is and I'm sorry for people in other languages. I don't know what's available to you. Those services I don't think do it in different languages. But for those who are using, say for instance in, I was speaking to a client in Finland yesterday, and she wants to do her recordings in Finnish. And so it would be great to find voice recognition software where you can do the same thing and Finnish and then just put the English next to each of those and send to me when you're sending a recording or for the ICF. But it's a really fantastic way. For the group sessions, you're not going to have a voice recognition, when we have a client in the group sessions. I tend to type my notes. And then I can go back and listen to the recording and pick up anything I may have missed. I'm just listening again, as best I can but know that it's, that's the hardest part of the process is recording in real time what you're getting. So, don't try and get it all, just do your best. And that's why we record everything so that you can go back and listen again if needed.

But I think the biggest thing you just said Henry is be kind to yourself in this process. Know that it's to support your learning and growth and expansion of your ability to understand the core competencies, and it's not about perfect, not about doing it like I do it. I have lots and lots of practice. This is for your learning. So, take it that way and whatever serves you best. But always fill in the bottom part, that lets me know what your integration thoughts are for the whole thing. And do your best as you go through the rest of the form to keep growing your ability to hear different parts and adding more to each, each time you do a recording, you'll maybe add more evidence. Or not, I don't know.

Henry (31:29): I think this is great, Carly. I thank you for sharing your experience and your wisdom, I know this certainly helped me and Have great faith that it will help others who are trying to get their arms around this process and continue on growth mindset and continue to learn.

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Carly (31:46): Thank you so much, Henry. I totally agree with you. And I'm so grateful for your willingness to do this with me today and being of service to the rest of the coaches. So, thank you so much for your time and energy.

Henry (32:00): My pleasure.

Carly (32:01): And with that we will say goodbye for now, and the resources will be available for you in the members only pages where this recording is.