

Life Coach Handbook

***All the Tools You Need to Manage a
Thriving Coaching Practice***

Effective Coaching Series Volume 1

First Edition

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PREFACE

This textbook covers the fundamentals of setting up a coaching business. I share tools and techniques that will assist you in launching and running your thriving coaching business. I approach this topic from coaching, psychology, counseling, marketing, and corporate management perspectives. The following foundational coaching resources are covered in this handbook:

- **Context**— Background information, research findings, theory, and contextual material that will give you the background you need.
- **Guidelines**— Best practices that will streamline your coaching processes and guarantee you deliver high-quality coaching services to your clients.
- **Planning**— Critical planning and decision-making techniques to rapidly optimize your coaching business.
- **Records**— Best practices for professionally documenting coaching information such as notes, records, intake, agreements, questionnaires, and feedback.
- **Skills**— Core coaching skills, techniques, and tips so you can get certified, launch your coaching business, and start immediately.
- **Business**— Foundational knowledge needed to run your business, manage financials, market your services effectively, create your brand, and build your Internet presence.
- **Exercises**— Proven techniques that will generate immediate success by jumpstarting the coaching process with your clients.
- **Forms**— Sample forms and business documents you can adapt and tune to your specific coaching practice.
- **Tools**— Smart tools that will help pinpoint particular client

issues so you can make informed, empathetic, and professional coaching decisions.

I approach the content of this book from coaching, psychology, counseling, and corporate management perspectives.

- In the psychology domain, I draw upon my experience as a Clinical Psychology professional with a Bachelor of Science in Psychology, Master's in Clinical Psychology, and a Ph.D. (Candidate) in Clinical Psychology.
- My coaching perspective originates from collaborating with clients as a Professional Certified Coach, accredited by the International Coach Federation.
- I bring a corporate management perspective from my 15-year career as a product manager at TD Bank, Microsoft, Mozilla, and Bell Canada.

I believe that each individual is whole, creative, self-guiding, and meaning-making. We all have unique strengths and gifts that we draw upon to create a life of meaning. Coaching is about exploring these strengths and gifts to help our clients find their path to fulfilling their true potential.

WEBSITES

Send feedback and read supplemental material on the **EffectiveCoachingSeries.com** website.

You may also be interested in the “Workplace Mental Health Series” to learn more about how to coach clients with workplace trauma and other mental life issues. Learn about the series by visiting the **WorkplaceMentalHealthSeries.com** website.

THE COACHING PROFESSION

INTRODUCTION

Coaching has been around for a long, long time. Plato's Dialogues from fourth-century BC Greece have many elements:

- Challenging assumptions
- Exploring ideas
- Making sense of the world

Modern coaching takes many influences from the contemporary sports coach. Coaches cheer on their team, dispenses advice, and motivates team members.

Coaching in the context of business has become more popular over the last decade. A business coach works in much the same way as a sports coach:

- Encouraging performance
- Facilitating desired outcomes
- Building skills
- Developing talent

Many companies recognize that if their employees are happy, then business productivity increases. Senior executives sometimes work with a coach that supports them to deliver business excellence, tackle work-life balance, and achieving personal fulfillment.

Life coaching emerged more recently and is gaining popularity in the business world and in the daily lives of individuals. Life coaching uses the process of dialogue to move clients in the right direction. When coaches engage in purposeful conversations, they help their clients cut through the noise and reach the core of the issues they are facing.

Coaches often discuss some of these topics with their clients:

- What beliefs about yourself stop you from taking specific actions?
- What your options, and how can you explore them?
- Why do you act in the way that you do?
- How can you best go about attaining the results you want to achieve?
- How can you maintain your motivation and stay on track?

Coaching conversations leave clients invigorated, inspired, and ready for action. Life coaching inspires clients to live the life they want and live through the parts they don't. Coaches draw upon the lessons the client has already learned and their strengths to achieve positive and lasting change. Coaching conversations help clients identify how to live their very best life, the one that taps into their full potential, strengths, and gifts.

Life coaching is a process of developing the questions that lead to the answers that are right for you. Fundamentally coaching does not assume the answers aren't out there for you; you already have all of your answers. The coach facilitates the exploration of how and where to find them.

The International Coaching Federation defines coaching as “partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.” Coaching helps people lead more fulfilled and meaningful lives and begins by focusing on what already works for you. Coaching will enable you to identify and optimize your values and strengths. Look at the big picture of your life so you can fine-tune and adjust the path you are on.

Coaching encourages deep reflection about yourself and your life to increase personal insight and awareness. Apply this new understanding to make clear, informed, and fresh choices.

Finally, coaching is about committing to actions that will create real, lasting change and move you towards a more meaningful, happy, and fulfilling life.

The coaching alliance is truly designed as a partnership in the service of a particular client's goals and desires—these are co-created with the client and coach.

Coaching is a learning experience between a coach and a client that builds on the client's desire to do something different in the future. Coaching is the process of exploring the possibilities for change and works through resistance to change. Egan's (2002) model of coaching identifies five stages:

- Stage 1: What does the client want or need?
- Stage 2: What is happening now?
- Stage 3: What possibilities make sense to the client?
- Stage 4: How does the client get what they want or need?
- Stage 5: How does the client make it happen?

The coach begins by understanding (Hammond, 1998) the client's desires, history, values, beliefs, and motivations. Throughout coaching, the issues the client focuses on change many times, and their desired outcome change as well. Clients explore possibilities to see what they want and how to make it happen. The coach remains curious and supportive throughout this process.

Clients connect with a coach for the following reasons:

1. An individual realizes something isn't working as they are not happy with the status quo.
2. An individual realizes their world has changed, and they have not evolved to adapt.
3. An individual wants a different outcome from the outcome they previously experienced.
4. An authority figure or someone they respect says they need to

change because of some non-compliant behavior.

5. An individual needs to prepare for a new leadership position.
6. An individual has become a new leader within an organization, and they need to integrate into the new culture.

Regardless of how a person enters coaching, the outcome is what is most important to the client. The client is more open and engaged in the coaching process if they voluntarily chose to receive coaching. The client is less open and more resistant to the coaching experience if they are required to be coached to stay within the status quo or current system they operate in.

Trust is critical because it is the basic building block of action. It is not possible to tune into someone else if there is no trust. Sincere support begins when the client trusts the coach.

Finally, coaching is only successful when a client believes that the desired outcome is worth the energy expended to get through the resistance to change.

[CONTEXT] COMPARING COACHING TO RELATED PROFESSIONS

Coaching differs from therapy, mentoring, and consulting, and the table below covers the difference between these four professions.

Therapy	Mentoring	Consulting	Coaching
Deals mostly with a person's past and trauma and seek healing.	Deals mostly with succession training and seek to help someone do what you do.	Deals mostly with problems and seek to provide information (expertise, strategy, structures, methodologies) to solve them.	Deals mostly with a person's present and seek to guide them into a more desirable future.

Therapy	Mentoring	Consulting	Coaching
Doctor-patient relationship. The therapist has the answers.	A less experienced person works with a wiser, more experienced person. The mentor has the answers.	Expert-person with problem relationship. The consultant has the answers.	Co-creative, equal partnership. The coach helps the client discover their answers.
Assumes many emotions are a symptom of pathology or are an indicator that something's wrong.	It is limited to the emotional response of the mentoring parameters.	It does not typically address or deal with emotions. The focus is on the information.	Assumes that emotions are natural and normalizes them.
The therapist diagnoses then provide professional expertise and guidelines to give clients a path to healing.	Mentors allow their clients to observe their behavior and their expertise. Mentors answer questions, provide guidance and wisdom.	The consultant stands back, evaluates a situation, and then identifies the problem and determines how to fix it.	The coach stands with the client and helps them identify their challenges. Coaches work with the client to turn challenges into victories and hold the client accountable so they can reach their goals.

How Coaching is Similar to Therapy

The training therapists receive highly applicable and relevant to the coaching relationship. If you are a trained therapist (whether a counselor, social worker, family therapist, psychiatrist, or psychologist), there are many transferable skills a therapist brings to the coaching relationship. Listening skills, reframing, positive regard for the client, notetaking, and process skills are just a few transferable skills.

Therapists conduct intake interviews and discuss challenging issues with clients. Solution-focused therapy uses questions to focus the

client's attention and awareness on what works rather than what is broken, and these are a valuable set of tools that can transfer to coaching.

Both coaches and therapists are similar in the following respects:

- Do not offer a solution, opinion, or advice.
- Do not provide recommendations on what might be done in the future.
- Ask questions and believe clients have the answers.
- Focus the client and highlight relevant issues.
- Emotions are valued, explored, and part of the process.

How Coaching is Different from Therapy

Coaching focuses on the present:

- Coaching focuses on the present and what clients can do today to align with their goals and mission.
- Therapy refers back to the past and previous experiences to work through their meaning and impact.

Coaching views clients as already whole, whereas therapy looks to resolve a past pain:

- Coaches view their clients as already whole, equipped with everything they need to reach their goals.
- On the other hand, therapists help their clients heal from trauma or negative experience.

Coaching looks toward the future, whereas therapy often looks to the past:

- People seek coaching as a method for creating a new future.
- Coaching is about a client starting from where she is, receiving support as she does the inner work necessary to create outer transformation.

- On the other hand, people seek therapy to cope or come to terms with something that happened in the past.
- They're often seeking tools to handle emotional issues that stem from past trauma.

Coaching empowers the client to solve her problems, whereas therapy offers guidance and direction:

- As humans, we want to solve problems for our friends and loved ones.
- But coaching empowers people to find their answers and the solutions to their problems.
- Coaches give non-directional feedback, often in the form of asking questions.
- On the other hand, people seeking therapy are often looking for professional advice and direction on how to cope with something.
- Therapists offer directions, guiding the conversation.

Coaching focuses on outer action with measurable results, whereas counseling focuses on the "inner" (the conscious and subconscious mind):

- The goal of coaching is to support clients in making specific changes.
- That is why a coach will often work with a client to create benchmarks they can aim towards during the time they work together.
- On the other hand, counselors often help their clients identify and gain a deeper understanding of the conscious and subconscious reasons for their behaviors.
- Change is not necessarily the goal here.

Coaches don't diagnose; therapists and other mental health professionals do:

- Life coaches identify current behavior and thought patterns in their clients and ask questions to help their clients change those patterns and move forward.
- On the other hand, therapists and other mental health professionals often look to diagnose their clients with conditions that explain why they behave a certain way.

Coaches Must Consider Mental Health Issues

According to the majority of coaches in the Harvard Business Review (HBR) survey, clients tend to be mentally “healthy,” whereas therapy clients have psychological issues. In the HBR respondents’ view, coaching does not seek to treat mental problems, such as depression or anxiety.

Coaching does not and should not aim to cure mental health problems. However, the notion that candidates for coaching are usually mentally robust flies in the face of academic research. Studies conducted by the University of Sydney, for example, have found that between 25% and 50% of those seeking coaching have clinically significant levels of anxiety, stress, or depression (Grant, 2001).

I’m not suggesting that most clients who engage coaches have mental health disorders; however, some might, and coaching clients who have unrecognized mental health issues can be counterproductive and even dangerous.

The vast majority of clients are unlikely to ask for treatment or therapy and may also be unaware that they have issues requiring it. That’s worrisome, because of contrary to popular belief, it’s not always easy to recognize depression or anxiety without proper training. A client is far more likely to complain of difficulties related to time management, interpersonal communication, or workplace disengagement than anxiety. This raises important questions for clients hiring coaches—for instance, whether a non-psychologist coach can ethically work with a client who has an anxiety

respondents said the field has charlatans, many of them lack confidence that certification on its own is reliable.

Part of the problem is the number of different certifications. There are more than fifty organizations issuing coaching certifications; buyers are understandably confused about which ones are credible. Currently, there is a move away from self-certification by training businesses and toward accreditation—whereby responsible international bodies subject providers to a rigorous audit and accredit only those that meet strict standards.

Although experience and clear methodologies are essential, the best credential is a satisfied customer. A full 50% of the coaches in the HBR survey indicated that individuals select coaches based on personal preferences.

[SKILLS] COACHES REMOVE OBSTACLES

Stella coaches remove obstructions without adding new ones through the process of helping their clients gain balance in all areas of their life. Obstruction blocks them from achieving their potential, and often the biggest obstacle is the belief systems of their clients.

Below are the most frequent coaching issues and the techniques competent coaches apply to remove obstacles (Martin, 2001).

Coaching issue	What clients present	Techniques coaches use to remove obstacles
Prioritize themselves last	Clients present themselves as martyrs and prioritize others before themselves. This derails their ability to achieve their goals by distracting them from what matters to them.	Coaches help clients reframe and reach the realization that they must help themselves first before they have the resources to assist others.

Coaching issue	What clients present	Techniques coaches use to remove obstacles
Family issues	Family issues cause them to opt-out of their dreams and are used as an excuse to remain stuck.	Coaches help clients balance the needs and demands of their families with their guilty conscience and their desired goals and dreams. Help clients realize that if they achieve their goals, their families will also benefit.
No clear vision or mission	Clients don't have a vision, a clear picture of what they want, or a mission statement.	The raw material for coaching is what the client wants to achieve in their coaching process and ultimately in their life.
Obscured outcomes	Clients have several goals or outcomes. If they do not sound committed to achieving one of the outcomes, it is possible that it is not theirs and may belong to someone else.	Coaches help clients identify what they want and how they will personally gain once their outcomes are achieved.
Financial Problems	Clients need help solving financial problems.	Coaches identify the client's desired financial outcomes and income without judgment. Coaches are not financial advisors and refer clients to qualified professionals. Coaches always stay away from providing financial advice.
Age barriers	Clients say they would like to do something and then immediately dismiss the goal because they are "too old." They feel too old to start.	Coaches encourage clients to realize their dreams, beginning with the most easily achieved objectives first. Clients become hooked on success, which builds momentum builds, and the client is inspired to continue despite their beliefs.

Coaching issue	What clients present	Techniques coaches use to remove obstacles
Being the hero	<p>Clients always take on too much work.</p> <p>The hero enjoys the glory of being able to help others and sacrifice themselves for what they consider to be the greater good.</p>	<p>Coaches uncover the reasons behind the client's action. Often it is because "they can't say no?" Coaches help build assertiveness and help clients practice the art of "saying no."</p>
The "one day" or lottery syndrome	<p>Clients have the belief that they will be lucky; their "lottery numbers will come up," and they will magically reach their goals and dreams through luck and good fortune.</p>	<p>Coaches encourage clients to contemplate the here and now. They ask clients what they could be today to work towards their dreams. Coaches help clients break down steps into small tasks to achieve their goals. This process shifts the locus of control within the client and away from external factors that they can't control.</p>
Stuck in a career rut	<p>Clients feel stuck in a career rut and cannot see their way out.</p>	<p>Coaches work with clients to identify all the jobs, careers, or professions that they can do if they had no restrictions. Then clients work with the coach to prioritize the list in order of "ease to accomplish," "cost-effectiveness," "impact on family," and "impact on self." The client works on the highest priority items first, and coaches use open-ended questions to coach them through the process.</p>

Coaching issue	What clients present	Techniques coaches use to remove obstacles
Rebels	<p>Clients that are rebellious by nature and initially have many goals they want to do achieve. Rebel clients push back at the coach when they don't attain their goals. Rebels over-commit with their coach and then deliberately avoid achieving their goals.</p>	<p>Rebellious clients create the freedom to achieve what they choose to without the feeling of being forced.</p> <p>Coaches help these clients understand their process and work with them to limit the number of goals they work on so they can step back from the process of rebelling.</p>
Stuck by Trappings	<p>The client wants to lead a simpler life but feels unable to live without the material things that are part of their current lifestyle.</p>	<p>Coaches ask these clients to write a list of all the reasons why they want a simpler life and all the rationalizations for remaining in the current lifestyle.</p> <p>Then clients work with the coach to prioritize the list in order of "ease to accomplish," "cost-effectiveness," "impact on family," and "impact on self." The client works on the highest priority items first, and coaches use open-ended questions to coach them through the process.</p>

Coaching issue	What clients present	Techniques coaches use to remove obstacles
Not enough time	Clients complain that they "don't have time," and that's why they are not able to move forward with their goals and dreams. This client complaint is not typically a genuine time issue; it's a commitment obstruction.	Coaches work with clients to address time issues by helping them develop time management skills. If there is a commitment issue, the coach confronts the client with their observable behavior and reminds them of the commitment they have made to themselves and the coaching process. Coaches then reiterate the benefits the clients have identified for achieving their goals. Coaches challenge them on why they consistently fail to deliver on their promises.
Adrenaline Junky	These clients get their kicks from the adrenaline rush of a crisis and claim that they perform better when they have tight deadlines. They are hooked on adrenaline and sometimes burn out because they work too hard and play too little.	Coaches facilitate these clients to understand their addictive process of seeking out their adrenaline buzz. Clients work through accepting that they may not want to give it up, and that could be trapping them in a cycle. Coaches collaborate with these clients to help them appreciate that the high of achieving their goals, through their efforts, is a healthy, intense, and longer-lasting euphoria.

Coaching issue	What clients present	Techniques coaches use to remove obstacles
Energy drainers	These clients associate with people and situations that deplete their energy. These friends, colleagues, careers, and partners continually suck the enthusiasm from these clients by creating obstacles or excuses to prevent change.	Coaches ask these clients to consider the possibility that their associates may feel threatened by the planned changes and may need to be reassured, by the client, that change will be good for all parties. If this reassurance does not achieve results, the client will need to consider the value of these friendships. Coaches support and encourage these clients to form new friendships that align and facilitate their goals without draining their energy in the process.

Coaches remove obstacles and encouraging clients to go beyond their perceived limitations so they can accomplish their aspirations, hopes, and dreams.

Coaches apply communication skills that get the best from their clients and to help them to identify the obstacles in their lives. Coaching is designed to create balance and fulfillment in the lives of their clients. Coaches are there for clients every step of the way, even when everyone in their life is not supporting them in achieving these goals. Coaching works because clients realize they can.

SYNOPSIS

- Coaching in the context of business has become more popular over the last decade.
- Conversations coaches have with their clients leave them invigorated, inspired, and ready for action.

COACHING BUSINESS FUNDAMENTALS

INTRODUCTION

Visualize and envision what you would like your business to look like your coaching business to look like in 2-3 years. Don't be tempted to think too far ahead beyond three years because the sweet spot for planning is within three years. Think through how much revenue your business will generate, and from what sources?

Make sure the vision for your business reflects your overall purpose for being in business and aligns with your mission, values, and ethics. In this section, I'll review various ways you can create and define these statements of your business plan. Your mission, values, and ethics may be part of the strategic planning process, but they all have different objectives. Keep in mind that these statements can be written for various aspects of your coaching business. If you remain connected with integrity to your business, you'll be happier and more successful. Your mission, values, and ethics are the guiding forces for weathering the ups and downs and remaining laser-focused on achieving your coaching business goals.

[CONTEXT] VISION, MISSION, VALUES, AND ETHICS

A **mission statement** is a concise explanation of the reason your business is in existence. It describes the purpose and overall intention of your coaching business. The mission statement supports the vision and serves to communicate purpose and direction to others.

To come up with a mission statement that encompasses all the significant elements of your business, you need to ask the right questions. Answering the following nine questions will help you

create a clear picture of the mission for your business.

- **Why are you in business?** What do you want for yourself, your family, and your customers? Think about the spark that ignited your decision to start your coaching business. What will keep your passion burning for your work?
- **Who are your customers?** What can you do for them that will enrich their lives and contribute to their success—now and in the future?
- **What image of your business do you want to convey?** Customers, partners, employees, and the public will all have perceptions of your company. How will you communicate the image of your business honestly and authentically to others?
- **What is the nature of your products and services?** What factors determine pricing and quality? Consider how these relate to the reasons why your business exists. How will this change over time as your business grows and evolves?
- **What level of service do you provide?** Most companies believe they offer “the best service available,” but do your customers agree? Be specific and define what makes your service so extraordinary.
- **What kind of relationships will you maintain with your partners?** Every thriving business develops a partnership with others to form mutually beneficial relationships. When you succeed, your partners will as well.
- **How do you differ from your competitors?** Many entrepreneurs forget they’re pursuing the same dollars as their competitors. Think through what do you do better, cheaper, or faster than your competitors? How can you fill a niche your competitors are ignoring? Understand your competitors’ weaknesses and turn them into your advantage?
- How will you use technology, tools, funding, processes,

products, and services to reach your goals? A description of your service and product strategy will keep your energies focused on your goals.

- What underlying philosophies or values guided your **responses to the previous questions?** Writing down what is guiding your mission clarifies the “why” behind your business. This will energize you and keep you on track when you encounter setbacks or challenging times.

A **vision statement** looks forward and creates a mental image of the ideal state that the organization wishes to achieve. It is inspirational and aspirational and should challenge employees. Questions to consider when drafting vision statements might include:

- What problem are we seeking to solve?
- Where are we headed?
- If we achieved all strategic goals, what would we look like ten years from now?

A **values statement** lists the core principles that guide and direct the organization and its culture. In a values-led organization, the values create a moral compass for the organization and its employees. It guides decision-making and establishes a standard against which actions can be assessed. These core values are an internalized framework that is shared and acted on by leadership. When drafting values statements, questions to consider might include:

- What values are unique to our organization?
- What values should guide the operations of our company?
- What conduct should our employees uphold?

In conjunction with a values statement, your **code of ethics** puts those values into practice. Ethics outline the procedures in place and behavior patterns that ensure your values are upheld. Ethics go beyond your belief system and includes expected professional coaching standards demanded of you.

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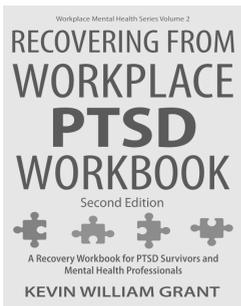
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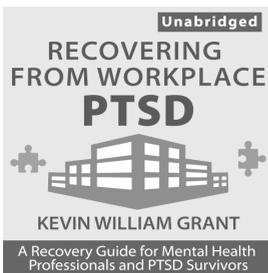
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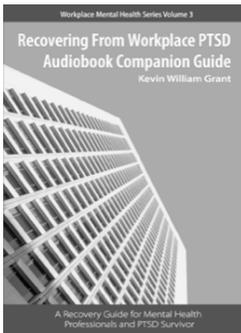
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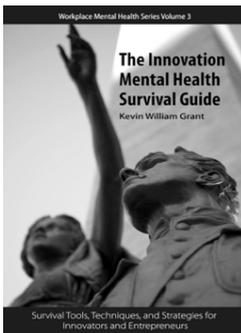
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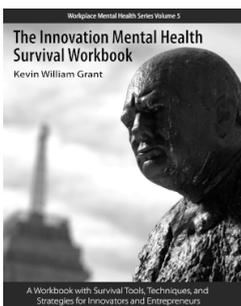
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