

# SURFACE TO SOUL

## Coaching School

*Empowering Leaders. Transforming Lives.*



2025

# COACHING MANUAL

# Welcome

Coaching is one of many pathways for empowering individuals, teams, and organizations to achieve their preferred future. It's an interactive process that involves working alongside leaders and professionals who ask, "What is possible for us in our roles and initiatives?" When executed effectively, coaching develops individuals who bring out the best in others, break free from challenges, and translate their ideas and insights into measurable outcomes. Coaching has the capacity to help people envision their preferred future and then acquire the tools, knowledge, and skills they need to turn their aspirations into reality.

Drawing upon the eight core competencies embraced by the International Coaching Federation, coaches help facilitate change by unlocking the potential in individuals, teams, and organizations. While Surface to Soul enthusiastically adheres to the ICF's coaching approach and practices, we also recognize that relationships are as important as tasks, that narratives are as important as strategies, that people are as important as systems, and that building on strengths is as important as addressing challenges. Coaching is a continuous process of discovery, implementation, evaluation, and reimagination, rather than a single event or occasional conversation.

Surface to Soul's Coaching School is designed to help new and experienced coaches understand, embrace, and trust the process outlined in the core competencies. We equip coaches to follow the client's lead and, through the use of powerful questioning, guide their clients toward their intended outcomes. Through active listening and strategic inquiry, a coach can help uncover a client's most pressing issues or reveal emerging opportunities in their professional or personal lives. You'll find questions woven throughout the Coaching Manual and at the end of every chapter to help you focus on what matters most.

***"The essence of executive coaching is helping leaders get unstuck from their dilemmas and assisting them to transfer their learning into results for the organization"***

This quote from Mary Beth O'Neil describes our wish for every coach and Coaching School participant. Our goal is to help coaches empower clients to overcome obstacles and unlock their full potential. As you read through this book, may you discover and experiment with new approaches and practices that move clients beyond "what is" in their lives to "what could be."

Be well and best wishes!



**JIM LADOUX**  
CHIEF OPERATIONS OFFICER



**DR. FELIX C. VILLANUEVA, MCC**  
CHIEF COACHING SCHOOL  
PROGRAMS OFFICER

## Our Mission

Empowering leaders to inspire and facilitate meaningful transformation through world-class coaching.

## Our Vision

Our vision is to cultivate a global community of transformational coaches who excel in driving personal, organizational, and societal growth by:

- **Delivering** exceptional ICF-accredited coach training that equips coaches with cutting-edge tools and strategies.
- **Building** a vibrant, supportive coaching community that fosters collaboration, ongoing learning, and mutual growth.
- **Serving** as a catalyst for personal and organizational transformation, unlocking potential and achieving impactful results.
- **Collaborating** with visionary individuals and organizations to champion entrepreneurial leadership and innovative approaches to coaching.

## Our Core Values

- **Intentional Community:** We prioritize authentic relationships and foster a sense of belonging within a thriving coaching ecosystem.
- **Ethical Training:** Our programs are rooted in integrity, professionalism, and alignment with ICF ethical standards.
- **Ease of Access:** We are committed to providing flexible, inclusive, and accessible pathways to high-quality coach training.
- **Networking:** We believe in the power of connection, offering opportunities to build relationships that enrich personal and professional development

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## Chapter Objectives

By the end of this chapter, you will:

- Understand and be able to explain the International Coaching Federation (ICF) definition of coaching.
- Be able to differentiate between coaching, consulting, mentoring, and counseling.
- Begin using the basic coaching agreement (the 5 essential questions) to facilitate and guide coaching conversations.

## Chapter 1: What Is Coaching?

The International Coach Federation (ICF) defines coaching as “partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.” Coaching can also be described as framing conversations through powerful questions to help clients achieve their desired outcomes.

While definitions may vary, most emphasize the following five elements common to coaching situations and relationships:

1. **Coaching is a partnership.** Coaches walk alongside their clients, serving as dialogue partners who evoke new possibilities and ways of thinking, being, and doing. This partnership is grounded in a safe and sacred environment that fosters trust and collaboration.
2. **Coaching accelerates transformation.** Through curiosity and deep listening, coaches help clients clarify their passions and preferred futures. Using powerful questions, they guide clients in identifying their goals and strategies to achieve them.
3. **Coaching maximizes potential.** Coaches focus on clients' strengths and giftedness, helping them move from their current state to what might be possible. They guide the development of actionable plans and encourage learning from results, making course corrections as needed.
4. **Coaching focuses on results.** Coaches emphasize both short-term wins and long-term outcomes, fostering shifts in attitudes, assumptions, words, and actions. This includes helping clients adopt new habits, address limiting beliefs, and translate intentions into tangible actions.
5. **Coaching envisions clients as resourceful.** Effective coaching draws out clients' insights, wisdom, and strengths, empowering them to identify resources and solutions for moving forward.

According to Tim Roehl and Steve Ogne in *TransforMissional Coaching: Empowering Leaders in a Changing Ministry World*, a coach:

- Comes alongside.

- Observes carefully.
- Ask questions wisely.
- Communicates options and resources.
- Holds accountable while caring for the client's heart.

## How Coaching Differs from Therapy, Consulting, and Mentoring

Therapists, consultants, and mentors all play vital roles in personal and professional growth, often complementing coaching. Here's how coaching is distinct:

### Coaching Versus Therapy

Coaching assumes an overall level of health and well-being, focusing on discovery rather than recovery. It emphasizes forward-thinking and future-oriented conversations aimed at peak performance and new possibilities. If there is no forward progress, it may not qualify as coaching.

### Coaching Versus Consulting

Dr. Felix Villanueva distinguishes coaching from consulting with two key questions:

- **Who is the recognized expert?** In consulting, the consultant is the expert, offering diagnoses and solutions. In coaching, the client is seen as the expert, capable of generating their own solutions.
- **Who is responsible for the outcome?** Consultants guide the implementation of their advice. Coaches empower clients to take ownership of their progress and results. By saying, "I don't know," coaches encourage clients to explore new solutions and tap into their own wisdom.

### Coaching Versus Mentoring

Mentoring is a learning relationship focused on long-term career development. A mentor shares their experiences to accelerate the mentee's growth. While coaching occasionally involves sharing insights, it primarily empowers clients to find their own solutions. A coach may ask, "Would you like to hear what others have done in similar situations?" sparingly to avoid disempowering the client.

## What Does a Typical Coaching Session Look Like?

A coaching session typically includes five sequential steps:

1. **Establish the topic.** You may ask something like: *What would you like to talk about?*
  - *Purpose:* Identify the theme or topic for discussion, ensuring the session stays focused and client-driven.
2. **Define desired outcomes.** You may ask something like: *What would you like to take away from today's session?*
  - *Purpose:* Move beyond conversation to tangible deliverables that demonstrate coaching's impact.
3. **Stay aligned with priorities.** You may ask something like: *Are we still addressing what's most important to you?*

- *Purpose:* Periodically confirm that the conversation remains relevant to the client's goals and priorities.
- 4. Invite the creation of actionable steps.** You may ask something like: *What will you say or do this week to act on your intentions?*
  - *Purpose:* Experienced coaches help clients take action within a certain time period. Without specific timelines, action items turn into nice-sounding intentions.
- 5. Encourage accountability.** You may ask something like: *Who can support you or hold you accountable?*
  - *Purpose:* Coaches build accountability into the process. They help clients envision who else might be a resource or source of wisdom.

By following these steps, coaches create structured yet flexible sessions that inspire clients to maximize their potential and achieve their desired outcomes.

### For Further Consideration: Seven Commonly-Used Coaching Strategies

Building on the five key questions for coaching conversations, consider incorporating the following strategies when appropriate:

- 1. Invite the leader to elaborate.**  
A simple yet powerful way to deepen the conversation is to invite the leader to "say more" or ask, "What else could you...?" These brief, open-ended prompts are invaluable when you're unsure of the next step in the discussion, helping the client explore their thoughts further.
- 2. Reflect back what you are hearing and observing.**  
Mirroring the client's words or observations can provide clarity and insight. By repeating or summarizing their statements, you help them see how they are framing the issue. You can also ask them to summarize what they've just shared, encouraging self-reflection and further exploration.
- 3. Encourage self-assessment using ratings.**  
Inquire by using a scale, such as: "On a scale of 1-10, how important is this project to you right now?" or "How passionate are you about this initiative on a scale of 1-10?" Follow-up with reflective questions like: "How engaged are your team members in this project?" These ratings provide a concrete way to measure progress and commitment.
- 4. Encourage role reversal.**  
Ask the client to consider the situation from a different perspective: "If you were the leader of this team, what would you do differently?" or "If you were [someone else], how might you have responded?" This shift in viewpoint can unlock new ideas and strategies.
- 5. Invite the leader to envision their desired future.**  
When working with individuals or organizations over time, encourage them to imagine their ideal outcome: "What do you hope to be celebrating by the end of this coaching process?" or "What is your vision for the future of this project?" Focusing on the big picture helps clarify the "WHY" and "WHAT" before diving into strategies and action plans. Coaches assist clients in understanding the **WHAT**, the **SO WHAT**, and the **NOW WHAT** in their development process.
- 6. Prompt reflection on next steps.**  
Help clients balance long-term goals with immediate actions by asking them to consider the steps ahead. For example, ask: "What can you accomplish before our next session?" or "What will be your primary focus over the next week or month?" This strategy helps maintain momentum while keeping the end result in mind.

7. **Explore their support system.**

Inquire about who can help the client achieve their goals: "Who has experience with what you're trying to do?" or "What resources do you need to gather to make this happen?" Asking these questions encourages clients to identify key resources and support networks that can accelerate their progress.



## Chapter 1: Assignments

- 1 | **Define Coaching:** According to the International Coach Federation (ICF), coaching is described as a partnership that inspires clients to maximize their personal and professional potential. How do you understand this definition? Explain in your own words how coaching differs from therapy, consulting, and mentoring.

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- 2 | **Reflect on the Role of a Coach:** Based on Tim Roehl and Steve Ogne's description of a coach, which of the five roles (coming alongside, observing carefully, asking questions wisely, communicating options and resources, holding accountable) do you think is most crucial for a coach? Why?

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- 3 | **Coaching Strategies:** From the seven commonly-used coaching strategies, choose one that resonates with you the most. How would you apply it in a real coaching session, and why do you think it's effective in promoting client growth?

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- 4 | **Coaching Session Structure:** A typical coaching session follows five steps: establishing the topic, defining desired outcomes, staying aligned with priorities, creating actionable steps, and encouraging accountability. Choose one of these steps and describe how you would approach it in your first coaching session with a new client.

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5 | **Coaching vs. Consulting:** Reflecting on the distinction between coaching and consulting, how would you handle a situation where a client asks for advice or a solution to a problem? How would you maintain the coaching mindset of empowering the client to find their own solutions?

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## Chapter Objectives

By the end of this chapter, you will:

- Gain a Comprehensive Understanding of ICF's 8 Core Competencies.
- Develop a deep understanding of the International Coach Federation (ICF) 8 core competencies, which form the foundation for effective coaching practice.
- Reflect on the application of these competencies in your coaching relationships.
- Begin to explore how these competencies currently manifest in your coaching relationships, allowing you to assess where you are excelling and areas for growth.
- Identify Practical Ways to Integrate These Competencies into Your Coaching Conversations:
  - Start thinking about concrete strategies and actions for embedding these competencies into your coaching sessions to elevate your practice and enhance client outcomes.

## Chapter 2: The Eight Core Competencies

The **eight core competencies** outlined in the International Coach Federation's (ICF) Core Competency Model represent the latest advancements in understanding the essential skills required for facilitating transformational coaching sessions. This model emphasizes several critical areas, including maintaining the highest standards of ethical behavior and confidentiality, cultivating a coaching mindset through ongoing reflective practice, establishing and navigating various levels of coaching agreements, and fostering a collaborative partnership between coach and client. Below is a summary of each core competency, including its definition and practical examples of how coaches can demonstrate it effectively.

### A. Foundation

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#### 1 | Demonstrates Ethical Practice

**Definition:** Consistently understands and applies coaching ethics and standards to foster trust, respect, and integrity in all coaching interactions.

1. Demonstrates personal integrity and honesty in interactions with clients, sponsors, and other relevant stakeholders.
2. Respects and is sensitive to clients' identity, environment, experiences, values, and beliefs.
3. Uses language that is appropriate, professional, and respectful to clients, sponsors, and stakeholders.
4. Abides by the ICF Code of Ethics and upholds its Core Values as a guiding framework.
5. Maintains confidentiality of client information in accordance with agreements and applicable

laws.

6. Clearly distinguishes coaching from consulting, psychotherapy, and other support professions.
7. Refers clients to other appropriate professionals when their needs extend beyond the scope of coaching.

### **Setting Boundaries for Ethical Practice**

Demonstrating ethical practice is rooted in establishing and maintaining appropriate boundaries that allow the coaching relationship to thrive. A boundary creates a clear, respectful space between yourself and others—physically, emotionally, and mentally. These boundaries:

- Define the parameters of the coaching services you will provide.
- Protect the integrity of the coaching relationship.
- Foster mutual respect, trust, and accountability.
- Reduce misunderstandings, confusion, and stress for both coach and client.

### **Proactive Boundary Setting**

The most effective way to establish boundaries is proactively—before any potential violations occur. Boundaries are often crossed when they are assumed rather than explicitly communicated. To avoid this, consider the following steps:

- Make a list of what you need from the client to perform at your best.
- Invite the client to share their expectations and needs as well.
- Collaboratively discuss and agree on shared norms, expectations, and boundaries to guide the coaching relationship.

During Coaching School, you will review various examples of expectations, norms, and boundaries. You'll also evaluate which practices are most appropriate for your unique coaching context, ensuring clarity and alignment in your future coaching relationships.

## **2 | Embodies a Coaching Approach**

**Definition:** Develops and maintains a mindset that is open, curious, flexible, and client-centered.

1. Acknowledges that clients are ultimately responsible for their own choices, actions, and outcomes.
2. Engages in ongoing learning and professional development to continuously improve coaching skills.
3. Cultivates an ongoing reflective practice to deepen self-awareness and enhance the quality of coaching.
4. Remains attuned to the influence of context and culture on oneself, the client, and the coaching relationship.
5. Leverages self-awareness and intuition to support and empower clients effectively.
6. Practices emotional regulation to maintain composure and presence in coaching sessions.
7. Mentally and emotionally prepares for each session to ensure readiness and focus.

8. Seeks guidance, mentorship, or external resources when necessary to support personal and professional growth.

### **Adopting a Coaching Mindset**

Coaches are naturally curious, continually seeking to understand their clients and how to best serve their interests without enabling dependency. They encourage exploration and self-discovery, creating a space where clients can take ownership of their journey. Coaches prioritize preparation before sessions to bring a clear and focused presence, while also engaging in post-session reflection to refine their approach and learn from each interaction.

### **The Role of Self-Awareness and Reflection**

Self-aware coaches recognize the importance of balancing their inner awareness with attentiveness to the unique circumstances, culture, and context of their clients. By doing so, they maintain a client-centered focus that aligns with their values and the coaching relationship's goals.

### **The Coach's Commitment**

Committed coaches strive to be mentally and emotionally ready for each interaction, aiming to inspire new awareness, possibilities, and growth in their clients. They focus on drawing out their clients' strengths and potential while staying laser-focused on the client's goals and desires. This approach reflects a dedication to fostering transformation, growth, and alignment with the client's aspirations and values.

## **B. Co-Creating the Relationship**

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### **3 | Establishes and Maintains Agreements**

**Definition:** Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans, and goals. This includes establishing agreements for the overall coaching engagement as well as for each coaching session.

#### **Key Elements of Establishing and Maintaining Agreements**

1. Clearly explains what coaching is and is not, describing the process to clients and relevant stakeholders.
2. Establishes agreements about the roles, responsibilities, and boundaries in the coaching relationship, including what is and is not offered.
3. Defines the guidelines and specific parameters of the coaching relationship, including logistics, fees, scheduling, duration, termination, confidentiality, and inclusion of others.
4. Collaborates with the client and stakeholders to establish a coaching plan and define overarching goals.
5. Facilitates discussions to determine client-coach compatibility.
6. Works with the client to identify or reconfirm session-specific goals and desired outcomes.
7. Helps clients articulate what they need to address or resolve to achieve their goals.
8. Partners with the client to define and periodically review success measures for both the engagement and individual sessions.
9. Ensures that time and focus during sessions are managed collaboratively and effectively.

10. Continues coaching in alignment with the client's desired outcomes unless directed otherwise.
11. Concludes the coaching relationship in a way that honors the partnership and the work accomplished.

## **Creating and Reviewing Coaching Agreements**

The coaching agreement establishes the framework for the coaching relationship, empowering coaches to follow the client's lead while providing structure. Effective agreements evolve over time and include three key components:

### **PART 1: Co-Create the Overarching Agreement**

The overarching agreement serves as the foundation of the coaching relationship. It should be co-created with the client and include the following elements:

- **Terms of the Relationship:** Document expectations, logistics, fees, scheduling, responsibilities, and desired outcomes in writing. Even for internal coaching, formal agreements are recommended.
- **Clarity About Coaching:** Define what coaching is—and is not—to manage expectations.
- **Compatibility Check:** Discuss whether the coach-client dynamic is a good match.
- **Client Needs and Purpose:** Explore the client's goals and purpose for engaging in coaching. Ask questions like, *"What do you want to be able to say three months from now that you cannot say today?"* This provides clarity on desired outcomes and motivates progress.

### **PART 2: Use the Ongoing Agreement to Guide Coaching Conversations**

The ongoing agreement provides structure and focus for each coaching session. Use these guiding questions:

- *"What do you want to talk about?"*
- *"What do you wish to take away from today's session?"*
- *"Are we still addressing what's most important to you?"*
- *"What steps will you take next to act on your intentions?"*
- *"Who will hold you accountable for your next steps?"*

### **PART 3: Schedule Periodic Reviews of the Overarching Agreement**

Regularly review the overarching agreement to ensure its continued relevance and effectiveness. Use questions like:

- *"What's still working based on our original agreement? What should we keep doing?"*
- *"Is there anything one or both of us need to stop doing?"*
- *"Is there anything new we should start doing?"*
- *"Are the goals and intentions we established still valid?"*
- *"Are there additional items we should address at this time?"*

Periodic reviews foster alignment, encourage feedback, and allow for course corrections to maintain a productive coaching relationship.

## **Additional Considerations for Creating Agreements**

When crafting the original agreement, consider asking:

- *“What do you hope to gain from this coaching relationship? What changes do you envision by the end of our time together?”*  
Clients often benefit from verbalizing their thoughts and intentions, gaining clarity as they articulate their goals.
- *“What should I know about your background, strengths, and challenges to be an effective coach for you?”*  
This encourages clients to share only what is critical for their progress, ensuring focused conversations.
- *“What indicators will show that our coaching relationship is successful and working well?”*  
This question highlights the priorities that contribute most to the client’s success and satisfaction.

### **Feedback Loops for Continuous Improvement**

Building ongoing feedback loops into the coaching process allows both the coach and client to refine the relationship and adjust for better outcomes. By regularly revisiting expectations, boundaries, and goals, coaches ensure that the partnership remains productive, aligned, and impactful.

## **4 | Cultivates Trust and Safety**

### **Cultivates Trust and Safety**

**Definition:** Partners with the client to create a safe, supportive environment that encourages open sharing and maintains a relationship grounded in mutual respect and trust.

### **Key Practices for Cultivating Trust and Safety**

1. **Seeks to Understand the Client:** Takes the time to understand the client within their unique context, including their identity, environment, experiences, values, and beliefs.
2. **Demonstrates Respect:** Honors the client’s individuality, including their identity, perceptions, style, and language, while adapting coaching approaches to meet the client where they are.
3. **Acknowledges the Client’s Contributions:** Recognizes and values the client’s unique talents, insights, and contributions throughout the coaching process.
4. **Shows Empathy and Support:** Provides consistent support, empathy, and genuine concern for the client’s well-being.
5. **Validates the Client’s Expressions:** Actively acknowledges and supports the client’s feelings, perceptions, concerns, beliefs, and suggestions without judgment.
6. **Builds Trust Through Openness:** Demonstrates transparency, authenticity, and appropriate vulnerability to strengthen the trust-based relationship.

### **The Importance of Trust in Coaching**

Trust serves as the foundation for all effective coaching relationships. Clients need to feel assured that the coaching environment is a safe and confidential space where they can share openly without fear of judgment. For many, their coach may be the only person with whom they can fully express their thoughts and emotions.

Key elements of a trust-building coaching relationship include:

- **Confidentiality:** Upholding strict confidentiality is essential to fostering openness. Clients need to feel confident that their disclosures will remain private.
- **Neutrality:** Maintaining a neutral and non-judgmental presence ensures the client feels supported and understood, free from criticism or bias.
- **Emotional Safety:** Creating a supportive space encourages clients to explore their thoughts and feelings without fear of rejection or invalidation.

### Practical Tips for Building Trust and Safety

1. **Active Listening:** Fully engage with what the client is saying, showing interest through verbal affirmations and body language.
2. **Clarify Expectations:** Discuss the boundaries and parameters of the coaching relationship, emphasizing confidentiality and the non-judgmental nature of coaching.
3. **Model Vulnerability:** Share appropriately from your own experiences to demonstrate openness, fostering a reciprocal sense of trust.
4. **Adapt Communication:** Mirror the client's communication style and language to create resonance and alignment.
5. **Validate Emotions:** Acknowledge and validate the client's emotions and perspectives, even when they differ from your own.

### Why Trust Matters

Trust empowers clients to:

- Share their deepest thoughts and challenges.
- Embrace vulnerability without fear of judgment.
- Explore new perspectives and solutions with confidence.

When clients feel safe and supported, they are more likely to take risks, try new approaches, and engage fully in the coaching process. As a result, the coach-client relationship becomes a powerful catalyst for growth, transformation, and meaningful progress.

## 5 | Maintains Presence

**Definition:** Demonstrates full consciousness and presence with the client by employing an approach that is open, flexible, grounded, and confident.

### Key Practices for Maintaining Presence

1. **Stays Focused and Attuned:** Maintains a sharp focus on the client's words, emotions, and nonverbal cues, ensuring empathetic and responsive engagement.
2. **Embraces Curiosity:** Demonstrates genuine curiosity, exploring the client's thoughts, feelings, and experiences without assumptions or judgment.
3. **Manages Personal Emotions:** Regulates personal emotions to remain calm, composed, and fully present for the client, even in challenging situations.
4. **Navigates Strong Emotions with Confidence:** Responds effectively to strong emotions expressed by the client, fostering a safe and supportive environment.
5. **Works Comfortably in Uncertainty:** Embraces the "not-knowing" space, allowing exploration



and discovery to unfold organically.

6. **Holds Space for Reflection:** Creates intentional pauses, encouraging silence and reflection to deepen awareness and insight.

### The Power of Presence in Coaching

Being fully present is one of the most impactful ways a coach can serve their client. Presence transcends active listening; it involves a mindful, nonjudgmental awareness that allows the coach to truly “be with” the client. When coaches demonstrate presence, they create an environment where clients feel seen, heard, and valued, which enhances trust and fosters deeper engagement.

### Practical Strategies for Maintaining Presence

- 1 | **Prepare Before the Session:** Engage in mindfulness practices, such as deep breathing or a moment of stillness, to center yourself before the session begins.
- 2 | **Tune Into the Client’s Energy:** Pay attention to the client’s tone, pacing, and body language, adapting your approach to match their energy and rhythm.
- 3 | **Use Open-Ended Questions:** Encourage exploration and self-discovery by asking thoughtful, open-ended questions that spark deeper reflection.
- 4 | **Welcome the Unknown:** Resist the urge to “solve” or “fix” and instead allow the client’s journey to unfold naturally, trusting the coaching process.
- 5 | **Normalize Silence:** Embrace moments of silence as opportunities for the client to process and reflect. Silence often leads to profound insights and breakthroughs.

### Why Presence Matters

When a coach maintains presence, they:

- Empower clients to explore their thoughts and emotions freely.
- Deepen the quality of the coaching conversation.
- Model mindfulness and intentionality, encouraging the client to adopt a similar mindset.
- Strengthen the coach-client connection, making the relationship more impactful and transformative.

### Reflection Questions for Coaches

- How do I prepare myself to be fully present before each session?
- Am I comfortable navigating moments of silence or uncertainty with clients?
- How can I deepen my ability to remain calm and grounded during emotionally intense sessions?
- What practices or routines help me stay mindful and engaged during coaching?

Maintaining presence is not just a skill—it’s a cornerstone of effective coaching. By staying grounded, open, and connected, coaches can create transformative experiences that empower clients to achieve meaningful growth and success.

## C. Communicating Effectively.

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## The Importance of Coaching Presence

Presence is a foundational skill that can make or break the coach-client relationship. The International Coach Federation (ICF) defines presence as the ability to be fully conscious and create a spontaneous relationship with the client, employing a style that is open, flexible, and confident.

Being present means being in the moment, laser-focused on the client, free from distractions, judgments, or preconceived ideas. It involves listening to understand and asking open-ended questions that encourage deeper exploration of issues, opportunities, and challenges.

Below are five actionable tips for enhancing your coaching presence.

### TIP 1 | It's Not About You—It's About the Client

The coach's role is to support and empower the client, not to provide solutions or take control. Confidence in "not knowing" is key to maintaining a coaching presence. By focusing on the client's journey, the coach helps them shift perspectives and explore possibilities.

Think of the coaching relationship like a dance: the client leads, and the coach follows, adapting and responding to the client's movements with grace and attentiveness.

### TIP 2 | Embrace Silence

Silence can be a powerful tool in coaching. While it may feel uncomfortable at first, allowing silence to linger creates space for deeper reflection and insight.

When you resist the urge to fill the gaps in conversation, clients often feel encouraged to open up further and share what's truly on their mind. Trust that silence can lead to breakthroughs.

### TIP 3 | Seek to Understand, Not to Be Understood

As Stephen Covey highlights in *The 7 Habits of Highly Effective People*, one of the most important habits is to "seek first to understand, then to be understood."

Many people listen just enough to prepare a response, rather than fully engaging with what is being said. Effective coaches practice **active listening**, tuning in to their client's words, emotions, and underlying meanings with the expectation of learning something new.

### TIP 4 | Share Insights Through Thoughtful Questions

Coaching presence often involves calling out observations and trusting your intuition to guide the conversation. Sharing your perspective can help clients gain clarity, self-awareness, and direction—but it must be done through respectful and thoughtfully crafted questions.

Consider using phrases like:

- "I've noticed that \_\_\_\_, and I'm curious how you came to that conclusion."
- "You've mentioned \_\_\_\_\_. How is that approach working for you?"

These types of questions help clients reflect without feeling judged or led.

### TIP 5 | Be Curious, Present, and Positive

Effective coaching starts with genuine curiosity and a positive mindset. By being fully present and showing care through active listening, you create an environment where clients feel safe, supported, and empowered.

Pay attention to your tone, facial expressions, and body language. These nonverbal cues can either foster an atmosphere of openness and trust or inadvertently shut down the conversation.

When clients sense your genuine interest and positive energy, they are more likely to explore new insights, ideas, and possibilities.

## Final Thoughts

Coaching presence is the cornerstone of a transformative coaching relationship. By prioritizing the client's needs, embracing silence, practicing active listening, sharing insights thoughtfully, and maintaining a curious and positive demeanor, you can create a space where growth and discovery flourish.

Your ability to be fully present is not only a gift to your clients but also a hallmark of an exceptional coach.

## 6 | Listens Actively

**Definition:** Active listening focuses on what the client is *and is not* saying to fully understand the communication within the context of the client's systems, while supporting their self-expression.

### Core Components of Active Listening

- 1. Contextual Awareness**  
Considers the client's context, identity, environment, experiences, values, and beliefs to enhance understanding of their communication.
- 2. Clarification Through Reflection**  
Reflects or summarizes the client's words to ensure clarity and mutual understanding.
- 3. Exploration Beyond the Surface**  
Recognizes when there is more to the client's message and inquires further to uncover deeper meaning.
- 4. Attunement to Non-Verbal Cues**  
Notices, acknowledges, and explores the client's emotions, energy shifts, body language, and other non-verbal behaviors.
- 5. Integration of Communication Channels**  
Synthesizes words, tone, pace, body language, and emotional context to fully grasp the client's intended message.
- 6. Pattern Recognition**  
Observes trends in the client's behaviors and emotions across sessions to discern recurring themes or patterns.

### The Importance of Active Listening

All effective coaching begins with active, engaged listening. The quality of a coach's listening skills directly influences the depth and value of the coaching experience. To bring out the best in others, a coach must actively and intentionally listen for it.

### Key Practices of Effective Listening:

- **Be Curious:** Demonstrate genuine interest in the client's experiences and aspirations.

- **Create a Safe Space:** Foster an environment where the client feels free to revisit core assumptions and share authentically.
- **Prioritize Exploration Over Answers:** Facilitate the exploration of possibilities rather than providing solutions.
- **Reflect Back:** Mirror what you've heard to affirm understanding and provide clarity.

### Active Listening: A Multi-Dimensional Process

1. **Intentional Engagement**  
Listening requires focused attention, free from distractions or preconceived judgments.
2. **Sensory Involvement**  
Use all senses to capture verbal and non-verbal communication, including tone, pace, body language, and facial expressions.
3. **Empathetic Connection**  
Tune into the client's emotions and underlying intentions to foster trust and deeper exploration.
4. **Holistic Perception**  
Go beyond the words to notice what is left unsaid, such as values, frustrations, motivations, and hesitations.

### Practical Tips for Active Listening

- **Listen More, Speak Less:** Aim to listen 80% of the time and respond 20% of the time.
- **Focus on What's Unspoken:** Pay attention to what the client avoids or hesitates to address.
- **Avoid Judgment:** Remain neutral, non-critical, and open.
- **Stay Present:** Avoid planning your next response while the client is speaking.
- **Look for Patterns:** Notice recurring themes, limiting beliefs, or emotional triggers.

### Listening Exercises

To sharpen active listening skills, try these exercises:

1. **Mute the TV:** Watch a muted show and interpret the story through body language, facial expressions, and context clues.
2. **Mirroring:** Partner with someone and reflect back what you heard verbatim to confirm understanding.
3. **Record Conversations:** With permission, record a conversation, then compare your initial observations to the recording. Identify what you may have missed.
4. **Selective Listening:** Focus on a specific element, such as tone of voice or frequency of smiles, and note its significance.

### The Anatomy of Great Listening

- **Ears:** Hear spoken words, tone, pitch, and inflection.
- **Eyes:** Observe body language and facial expressions.
- **Heart:** Tune into emotions, frustrations, and aspirations.
- **Stomach:** Trust your intuition and "gut feelings" about what's being communicated.

### The Role of Language in Active Listening

Words matter. The way a coach uses and interprets language can shape the coaching relationship and outcomes.

1. **Choose Neutral Words:** Use language that fosters safety, curiosity, and exploration without imposing assumptions or judgments.
2. **Match the Client's Language:** Reflect the client's phrases and tone to establish rapport and encourage deeper dialogue.
3. **Highlight Distinctions:** Help clients shift perspectives by exploring subtle differences in language, such as:
  - Obstacles vs. Opportunities
  - Perfection vs. Excellence
  - Either/Or vs. Both/And
4. **Acknowledge and Celebrate:** Create an environment of trust and encouragement by recognizing the client's insights, strengths, progress, and accomplishments.

## Final Thoughts

Active listening is a skill that, when consistently practiced, enhances all relationships—coaching and beyond. By listening with intention, curiosity, and empathy, coaches empower their clients to uncover insights, overcome challenges, and achieve meaningful growth.

Active listening is the cornerstone of effective coaching. It builds trust, encourages self-expression, and uncovers deeper insights. When coaches master the art of listening, they create a powerful environment for clients to explore, grow, and achieve their goals. Listening is not just a skill—it is the gateway to transformational coaching.

Practice active listening in all areas of life, and watch as your connections deepen and your coaching impact flourishes.

## 7 | Evokes Awareness

**Definition:** Evoking awareness is the process of facilitating client insights and learning through the use of tools and techniques such as powerful questioning, silence, metaphors, and analogies. This approach empowers clients to uncover new perspectives, reframe challenges, and explore possibilities.

### Core Practices for Evoking Awareness

Coaches evoke awareness by:

1. **Considering Context:** Taking into account the client's experience, background, and environment to determine the most effective approach.
2. **Challenging for Growth:** Presenting challenges that prompt the client to discover insights, new perspectives, and innovative approaches.
3. **Exploring the Client's Inner World:** Asking questions about the client's values, beliefs, needs, and ways of thinking.
4. **Encouraging Expansive Thinking:** Guiding the client to explore ideas and perspectives beyond their current frame of reference.
5. **Fostering Present-Moment Awareness:** Inviting the client to reflect on their current experiences

and emotions.

6. **Identifying What Works:** Observing and highlighting what is effective or ineffective to support the client's progress.
7. **Adapting Approaches:** Adjusting coaching strategies based on the client's evolving needs.
8. **Uncovering Patterns:** Helping clients identify influences on current and future behaviors, thoughts, and emotions.
9. **Generating Forward Momentum:** Inviting clients to brainstorm ideas, identify next steps, and assess their readiness for action.
10. **Reframing Perspectives:** Supporting clients in viewing their situations through new and empowering lenses.
11. **Offering Observations:** Sharing insights or feedback—without attachment—to inspire deeper exploration and understanding.

### **Fostering New Awareness**

#### **Key Strategies:**

- **Clarifying Questions:** Help clients uncover their true intentions and refine their thinking.
- **Encouraging Curiosity:** Inspire clients to explore new possibilities and perspectives.
- **Articulating Values and Beliefs:** Guide clients in expressing and examining their core values, assumptions, and guiding principles.
- **Interpreting Data Differently:** Challenge clients to see familiar information in fresh and meaningful ways.

#### **How Coaches Facilitate New Awareness:**

1. **Contextual Listening:** Exploring the broader context of the client's life, including their goals, values, and past experiences.
2. **Uncovering the Unseen:** Helping clients articulate insights or emotions they may not yet fully recognize.
3. **Drilling Down:** Gradually peeling back layers of thought to reach core issues or underlying beliefs.
4. **Noticing Clues:** Picking up on subtle signals such as tone, body language, or recurring themes that point to deeper truths.

### **Addressing Limiting Beliefs and False Assumptions**

#### **Examples of Limiting Beliefs:**

- "I have no power or control."
- "It's my fault if people get upset."
- "I'm not good enough."
- "Change is too difficult or risky."

#### **Coaching to Transform Beliefs:**

- Encourage curiosity and open-mindedness.

- Raise clarifying questions that challenge assumptions.
- Explore alternative viewpoints and possibilities.
- Help clients reinterpret their circumstances in empowering ways.

#### **Questions to Raise Awareness:**

- What recurring patterns or challenges do you notice in your life?
- What are you tolerating, and what's the cost?
- What limiting beliefs might be holding you back?
- What would a bold or unconventional solution look like?

#### **Powerful Questioning**

**Definition:** Powerful questions are intentional, open-ended inquiries designed to challenge limiting beliefs, spark creativity, and encourage reflection.

#### **Characteristics of Powerful Questions:**

- **Connected to Deep Listening:** Arise naturally from engaged listening.
- **Focused and Concise:** Get straight to the point without overwhelming the client.
- **Free of Hidden Agendas:** Avoid leading or suggestive phrasing.
- **Open-Ended:** Encourage expansive thinking rather than limiting yes/no responses.
- **Clarifying:** Slow down automatic responses and promote thoughtful exploration.
- **Perspective-Shifting:** Invite clients to view situations from different angles.

#### **Examples of Powerful Questions:**

- What opportunities are you overlooking?
- What's one small step you could take right now?
- Who else could provide insight or support?
- What does success look like for you in this situation?
- What's holding you back, and why?

#### **Top 10 Questions for Evoking Awareness**

1. On a scale of 1 to 10, how would you rate [specific area] and why?
2. What are you tolerating, and what would change if you addressed it?
3. What's working well, and what isn't?
4. What's keeping you up at night?
5. What would you love to celebrate a year from now?
6. What's the simplest solution to this problem?
7. Who can help you achieve your goals?
8. What new possibilities could you explore?
9. What's one thing you can do this week to move forward?

10. Are you ready to make the necessary sacrifices for what truly matters?

### Integrating Powerful Questions into Meetings

Replace standard agenda items with thought-provoking questions to foster meaningful dialogue:

- Instead of "Hospitality," ask: *What would a 'wow' experience look like for a first-time guest?*
- Instead of "Strategic Plan Update," ask: *Where do we see our values in action, and how can we build on that?*

### Jump-Start Conversations:

Powerful questions shift the focus from routine updates to impactful discussions, fostering creativity, engagement, and alignment with core objectives.

### Final Thoughts

Evoking awareness is at the heart of transformational coaching. By using powerful questions, adapting approaches, and fostering curiosity, coaches empower clients to uncover insights, challenge assumptions, and take meaningful steps forward.

**Practice Tip:** Reflect on the questions you frequently use. Are they sparking creativity and reflection? Are they helping clients tap into their inner wisdom? By consistently refining your questioning skills, you'll unlock new levels of awareness and growth for your clients.

*NOTE: You will find a more comprehensive list of Powerful Questions in Appendix C of this Manual.*

## D. Cultivating Learning and Growth

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### 8 | Facilitates Client Growth

**Definition:** Partners with the client to transform learning and insight into actionable steps, promoting the client's autonomy in the coaching process.

1. **Supports Integration of Insights into Action:** Works collaboratively with the client to integrate newfound awareness, insights, or learning into their worldview and behaviors, ensuring sustainable growth and change.
2. **Co-Designs Goals and Action Plans:** Partners with the client to design actionable goals, outline clear steps, and create accountability structures that reflect and expand upon their new learning.
3. **Empowers Client Autonomy:** Acknowledges and reinforces the client's autonomy, ensuring they have ownership over their goals, actions, and accountability measures.
4. **Facilitates Identification of Outcomes:** Helps the client identify the potential outcomes, results, or learning that can emerge from their identified action steps, making the process more tangible and purposeful.
5. **Explores Pathways Forward:** Invites the client to reflect on how they can move forward, considering resources, support, and potential obstacles that might arise along the way.
6. **Summarizes Learning:** Partners with the client to review and consolidate key learnings and insights within or between sessions, ensuring they are fully integrated into future actions.



7. **Celebrates Progress:** Acknowledges and celebrates the client's growth, progress, and successes, reinforcing their motivation and sense of achievement.
8. **Concludes Sessions Constructively:** Partners with the client to close sessions on a positive note, reflecting on learnings and reinforcing commitments to action.

## Facilitating Client Growth: A Three-Step Process

### 1. Step 1: Brainstorming

Brainstorming opens up possibilities and fosters creative thinking. It allows clients to see situations from new perspectives and uncover alternative paths forward. A powerful tool in this phase is "question-storming," where a series of probing questions help identify core issues and clarify goals before jumping into solutions. These questions ensure that clients have a thorough understanding of the problem at hand, laying a strong foundation for productive action planning.

### 2. Step 2: Designing Action

Action planning is the bridge between insight and implementation. With clarity from brainstorming, coaches help clients design SMART goals (Specific, Measurable, Achievable, Relevant, and Time-bound). Action steps are broken down into smaller, manageable pieces to prevent overwhelm and ensure forward momentum. Coaches can employ strategies such as:

- **Acknowledging:** Recognizing what has been accomplished so far.
- **Backward Planning:** Starting with the goal and mapping backwards to identify key steps.
- **Creating Structure:** Identifying who and what will keep the client focused and motivated.
- **Recognizing Roadblocks:** Proactively considering potential challenges and preparing solutions.
- **Establishing Blitz Days:** Setting aside dedicated time to focus on key tasks.
- **Identifying Daily Wins:** Breaking down goals into actionable daily steps that provide consistent progress.

A commonly used framework for action planning is the G.R.O.W. Model:

- **G:** Goal (Clarify the objective)
- **R:** Current Reality (Understand the current situation)
- **O:** Opportunities (Explore potential solutions and opportunities)
- **W:** What's Next (Identify the next actionable step)

### 3. Step 3: Follow-Through

Accountability is crucial for sustained growth. Coaches encourage clients to reflect on their progress and course-correct as necessary. Through clarifying questions, coaches help clients assess what's working, what isn't, and how they can adjust their approach to stay on track. Examples of such questions include:

- "What's happened since our last session?"

- "What challenges did you encounter, and how did you address them?"
- "What will you commit to for the next time we meet?"
- "What do you want to focus on today?"

The key is to guide clients towards consistent action while holding them accountable for their commitments.

## Tending to and Tracking the Coaching Relationship

Maintaining a positive coaching relationship enhances the client's experience and supports long-term success. Coaching is an interactive process that requires sensitivity to the client's needs, preferences, and progress. The following practices ensure a productive coaching relationship:

1. **Note-Taking:** Document key observations during sessions to deepen your understanding of the client's needs and progress. These notes should enhance, not hinder, your active listening.
2. **Coaching Reflection:** Record coaching sessions for self-assessment and review, seeking feedback from a mentor-coach to improve your coaching presence.
3. **Quieting the Mind:** Prior to and after sessions, intentionally clear your mind to maintain a focused, clean frame of reference. Reflect afterward on what went well and areas for improvement.
4. **Head and Heart Listening:** Shift from intellectual understanding to intuitive listening. Encourage clients to explore how they're feeling in their bodies, helping them connect with their emotions.
5. **Check-in Regularly:** Ensure you're aligning with the client's goals by asking clarifying questions to make sure you're addressing their needs and desires.

By maintaining a strong, supportive coaching relationship, you increase the likelihood that clients will stay engaged in the process and follow through with their action steps, resulting in deeper and more lasting change.

## Chapter 2: Assignments

- 1 | What do you think it means to establish trust and intimacy with a client in a coaching relationship, and why is this important?**

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- 2 | How can asking powerful questions help a client gain insights and move forward in their goals? Can you think of an example of a powerful question?**

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- 3 | Why is it important to be fully present with your client, and how do you think this impacts the coaching process?**

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- 4 | When you think about designing actions or setting goals with a client, what does it mean for those goals to be both realistic and empowering?**

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**5 | How can you ensure that you are supporting the client in taking responsibility for their own actions and learning, rather than giving them all the answers?**

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## Chapter Objectives

By the end of this chapter, you will:

- Explain the foundational elements of the coaching agreement and their role in structuring coaching conversations.
- Identify and describe the core components of the Five-Step Coaching Model, the 5Rs Coaching Model, and the GROW Coaching Model.
- Compare the unique strengths and applications of the three coaching models in various coaching contexts (e.g., individual, team, or group coaching).
- Apply the steps of each model to realistic coaching scenarios, demonstrating their practical use in facilitating client progress.
- Evaluate the effectiveness of each model in addressing different client needs and goals, and adapt them to specific coaching situations.
- Develop the ability to select an appropriate coaching model or combine elements from multiple models to best support clients' growth and success.

## Chapter 3: Common Coaching Models

The foundational coaching agreement serves as the cornerstone for structuring and understanding effective coaching conversations. Building upon this framework, the three models introduced in this chapter offer unique perspectives and practical adaptations on how the core elements of the agreement can unfold during a coaching session. Each model provides distinct language and steps that many students find insightful and applicable in guiding clients. As you explore these models, reflect on how they might enrich your approach to helping clients navigate challenges and achieve their desired outcomes.

### The Five-Step Coaching Model

This coaching model provides a reliable framework you can return to repeatedly as your skills evolve and you engage with a diverse range of clients and situations. It is a practical approach inspired by established coaching practices and reflects the ongoing agreement outlined in Chapter One.

Many students appreciate this model because it uses the metaphor of constructing a sturdy house:

- A solid foundation (Step 1: Listen and Step 2: Evoke)
- A supportive frame (Step 3: Clarify and Step 4: Brainstorm)
- A strong roof (Step 5: Support)

As you review the five steps, imagine how this structure ensures strength and alignment in a coaching relationship.

#### Step 1 | Listen

The goal as a coach is to listen so attentively that the client's answers naturally emerge. Ideally, you are listening 80% of the time and responding only 20%. It's critical that the client feels truly heard and

understood. Deep listening involves:

- Using your ears, eyes, and full presence to connect.
- Noticing tone, inflection, speed, and pitch.
- Paying attention to what is said—and what is left unsaid.
- Focusing on the last thing the client shares.
- Listening without judgment, criticism, or a personal agenda.
- Avoiding planning your response while the client speaks.

## Step 2 | Evoke

Encourage the client to elaborate and explore deeper. Evoking is like turning on a faucet to access the flow beneath the surface of their thoughts and feelings. Examples of evocative prompts include:

- "Hmm... tell me more about that."
- "What else would you like to share?"
- "Is there anything else I should know?"

## Step 3 | Clarify

After the client has shared, it's essential to respond and ensure mutual understanding. This helps clients hear their own thoughts from a fresh perspective while ensuring alignment between you both.

Techniques for clarification include:

- **Mirroring:** "I heard you say..."
- **Paraphrasing:** "I sense that..."
- **Verifying:** "Is this what you mean?"
- **Rating:** "On a scale of 1 to 10, how important is this to you?"
- **Ranking:** "Can you prioritize these based on importance?"

## Step 4 | Brainstorm

Once clarity has been achieved, you and the client can dig deeper into the issue, generating ideas and solutions. Questions are key to fostering creativity and exploration. Examples include:

- "What are all the options or opportunities here?"
- "What's the simplest solution? What's the most unconventional solution?"
- "What might happen if you don't address this?"
- "What's holding you back?"
- "Three months from now, what do you want to say about this situation that you can't say today?"
- "What do you truly want?"

## Step 5 | Support

Action is at the heart of coaching. Helping clients design actionable steps bridges the gap between where they are and where they want to be. Typical questions to conclude a session include:

- "What action do you want to take? By when will it be completed?"

- "What would you like to update me on at our next session?"
- "What steps will bring you closer to your goal? Who can assist you?"
- "What do you need to focus on next week?"
- "What obstacles might arise, and how can you navigate them?"

In follow-up sessions, build accountability and momentum by asking:

- "What progress have you made?"
- "What didn't get accomplished, and why?"
- "What challenges came up?"
- "What's your next step?"

## The 5Rs Coaching Model

This model is particularly effective for cohort groups working toward shared goals, as well as for individuals, project teams, and task forces. It emphasizes building trust, fostering collaboration, and creating a structured approach to reflection and planning. The model works best in 45- to 60-minute sessions, with participants coming prepared to respond to specific questions. Coaches typically select one or two questions from each step. Below are the steps and sample questions:

### STEP 1 | RELATE

- How are you doing? What's been on your mind since we last spoke?
- What's new or notable in your life or work?
- What have you been practicing, learning, or exploring recently?
- What's come up that we need to prioritize in today's session?
- What moments of rest, reflection, or renewal have you experienced this past month?

### STEP 2 | REVIEW

- What progress have you made on your goals since our last session?
- What obstacles have you encountered, or are you currently facing?
- What factors contributed to your successes? Your challenges?

### STEP 3 | REFLECT

- What have you been learning about yourself or others through this process?
- What strategies or approaches seem to be working well? What's not working?
- What might you do differently moving forward?
- What skills, tools, or resources were missing? How could you address this next time?
- What steps might increase your effectiveness and impact?
- On a scale of 1–10 (10 being very willing), how ready are you to make these changes?
- Are your actions aligned with the outcomes you want to achieve?

### STEP 4 | REFOCUS

- What are your goals or next steps for the next 30 days?
- What would you like to be celebrating a month from now?
- What options do you see for achieving your goals?

- How will you choose your course of action?
- What steps will you take (who, what, where, when, how)?
- How will you track and measure your progress?
- Where might you encounter resistance or challenges, and how will you address them?
- What actions will you take in the next 48–72 hours?
- How would you like our coaching relationship to evolve?

## STEP 5 | RESOURCE & WRAP UP

- What did we accomplish during today's session?
- What commitments or action steps have we agreed upon for the next period?
- What part of today's session was most helpful? What could be improved for next time?
- How can we ensure our future sessions are even more effective?
- When will we meet next?

## The GROW Coaching Model

The GROW model was introduced briefly in an earlier chapter, but here we'll explore it in greater detail. This model offers a practical structure for coaches to help clients make tangible progress in areas such as work, relationships, personal development, or any other aspect of their lives where they want to move forward.

Developed by John Whitmore, author of *Coaching for Performance: The Principles and Practice of Coaching and Leadership*, the model highlights four key focus areas: **Goal, Reality, Options, and Will**. Each step provides a clear framework for guiding meaningful conversations and supporting clients in achieving their objectives.

### GOAL: Where are we headed?

This step clarifies the client's objectives and defines the purpose of the session.  
Sample questions:

- How can I be most helpful to you today?
- What do you need to gain the most value from this conversation?
- What role would you like me to play in this session—listener, advisor, or something else?
- What specific topic should we focus on today?
- What's one issue we could address today that would have the greatest impact on moving you forward?
- What challenges or obstacles are you currently facing?
- What's holding you back from achieving your goals?

### REALITY: Where are we starting from?

This step helps the client reflect honestly on their current situation and identify the factors at play.  
Sample questions:

- Tell me about your current situation. How would you describe it honestly but objectively?
- What challenges are you facing, and how are they affecting your mindset or progress?



- How have you been resourcing yourself to address this issue?
- In what ways have you sought advice, expertise, or support?
- What's the biggest area of discomfort or tension for you around this issue?
- What's causing you the most stress or anxiety at the moment?

#### **OPTIONS: How can we get there?**

This step explores possible solutions and paths forward, encouraging creativity and open-mindedness.

Sample questions:

- What are some potential solutions or approaches you've considered?
- What other options might exist if you looked at this from a different perspective?
- What else? Can you think of any overlooked possibilities?
- If there were no limitations—such as time, money, or resources—what would you choose to do?
- If anything were possible, what would the ideal path forward look like?
- Is there an option you previously dismissed but might reconsider now?

#### **WILL: What are you willing to do? What will it take to get there?**

This step focuses on commitment and action, helping the client take concrete steps toward their goal.

Sample questions:

- What do you need to move forward? What specific resources, tools, or support will help?
- How will you prioritize the options we've discussed? What needs to be done first, and what can wait?
- What's one small action you can take this week to start moving in the right direction?
- How will you measure your progress and stay accountable?

## Chapter 3: Assignments

- 1 | Describe the foundational coaching agreement and explain its importance in structuring effective coaching conversations. How does it serve as the basis for the Five-Step, 5Rs, and GROW models?**

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- 2 | Compare and contrast the Five-Step Coaching Model, the 5Rs Coaching Model, and the GROW Coaching Model. Identify one unique strength of each model and describe a scenario where it would be particularly effective.**

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- 3 | Step 1 of the Five-Step Coaching Model emphasizes deep listening. Describe three techniques you could use to listen effectively during a coaching session. Provide an example of how you might apply these techniques in a coaching scenario.**

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- 4 | Using the 5Rs Coaching Model, create one open-ended question for each step (Relate, Review, Reflect, Refocus, Resource & Wrap Up) that you could ask a client working on a professional development goal.**

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**5 | The "Will" phase of the GROW model focuses on commitment and actionable steps. Imagine you are coaching a client struggling to prioritize their next steps. What three questions would you ask to help them clarify their priorities and build accountability?**

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## Chapter Objectives

By the end of this chapter, you will:

- Differentiate between teams and groups, highlighting their key characteristics and purposes.
- Identify the unique dynamics of coaching teams versus coaching groups.
- Explain the importance of shared vision, purpose, values, and norms in team coaching.
- Describe the key elements necessary for successful group coaching, including clear goals, preparation, and defined timelines.
- Apply communication best practices to foster collaboration, accountability, and engagement in both teams and groups.

## Chapter 4: Tips for Coaching Teams and Groups

### Understanding Teams vs. Groups

While both teams and groups are composed of individuals working together, they serve different purposes and operate in distinct ways. Each organization may define these terms uniquely, but the following general distinctions are helpful:

#### **Teams:**

- Share a common vision, purpose, and values.
- Tend to be long-term in nature, depending on their objectives.
- Work collaboratively toward a common goal.
- Require interdependence among members to achieve success.

Coaching a team involves focusing on collective performance, fostering collaboration, and aligning individual strengths with team objectives. For example, while a coach for an individual athlete hones specific skills for personal success, a coach for a soccer team emphasizes synergy, communication, and strategic partnerships within the group. A team coach prioritizes the group's best interests above those of any individual.

#### **Groups:**

- Gather for a specific purpose, such as learning new skills, exchanging support, or addressing a specific topic.
- Can be short- or long-term depending on their function.

- Members do not necessarily rely on each other to achieve their goals.

Certain coaching strategies apply effectively to both teams and groups, but understanding their distinctions helps coaches tailor their approach.

### Key Elements of Effective Team Coaching

1. **Establishing Shared Expectations and Norms:** Both teams and groups require shared expectations and norms to function effectively. Confidentiality, mutual respect, and clear communication are foundational. Coaches must establish trust by avoiding behaviors like taking sides, betraying confidences, or allowing divisive communication patterns.
2. **Defining Purpose, Goals, Vision, and Values:** At a team's inception, coaches should facilitate discussions to define:
  - **Purpose and Goals:** What the team aims to accomplish.
  - **Vision and Values:** What drives and unites the team.
  - **Norms:** The agreed-upon code of conduct.
  - **Roles:** Responsibilities assigned to each member.

By clarifying these elements early on, teams can minimize misunderstandings and align their efforts toward shared objectives.

3. **Establishing Norms:** Norms set the behavioral expectations for the team. For instance, if punctuality is valued, the team might agree to start all meetings on time, with no exceptions. Clear norms create accountability and enhance efficiency.
4. **Assigning Roles:** Assigning and clarifying roles prevents overlap and confusion. Coaches can facilitate exercises where members outline their responsibilities, then compare and align these expectations with the team's goals.
5. **Crafting Agendas for Team Sessions:** Unlike individual coaching, team coaching sessions benefit from pre-defined agendas. Coaches can gather input from team members via email or during the previous session to structure the upcoming discussion. This ensures sessions are focused and productive.

### Key Elements of Successful Group Coaching

6. **Clear Purpose:** Every group must have a compelling reason to exist, such as supporting members in achieving personal goals or applying newly learned skills. A shared purpose provides motivation and fosters engagement.
7. **Clearly Stated Individual Goals:** Each group member should set clear, measurable goals with milestones for regular check-ins. Sharing progress during sessions promotes accountability and collaboration.

8. **Adequate Preparation:** Group coaching sessions should balance structure with flexibility. A well-prepared coach ensures progress while remaining open to emergent learning opportunities.
9. **Strong Coach Presence:** A group coach should command respect and maintain focus, facilitating discussions and ensuring balanced participation. The coach's role is to listen actively, guide conversations, and keep sessions on track.
10. **Defined Timeline:** Successful group coaching has a clear beginning, middle, and end. Participants should understand the schedule and work toward a final session where progress is celebrated.

### **Communication Best Practices for Teams and Groups**

To establish positive dynamics, coaches should help groups or teams set ground rules for communication at the outset. Key practices include:

- Sending session summaries with key takeaways, agreed actions, and reminders for the next meeting.
- Sharing agendas and updates a few days before each session to keep participants informed and prepared.
- Providing ongoing resources, insights, and encouragement through emails, texts, or other communication channels.

By fostering open communication, encouraging accountability, and maintaining a focus on shared or individual goals, coaches can create impactful and meaningful experiences for both teams and groups.

## Chapter 4: Assignments

- 1 | Define the key differences between teams and groups. Provide examples of situations where a coach might work with each.**

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- 2 | Explain why establishing shared vision, purpose, and values is essential in team coaching. How does this differ in group coaching?**

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- 3 | What are some specific strategies a coach can use to facilitate the creation of norms and roles in a team? Why are these strategies important for team success?**

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- 4 | List and describe three best practices for effective communication in group or team coaching settings. How do these practices contribute to the overall success of coaching sessions?**

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**5 | Imagine you are coaching a newly formed team. What steps would you take to ensure they have clear goals, roles, and norms? Outline a sample agenda for your first team coaching session.**

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## Chapter Objectives

By the end of this chapter, you will:

- Identify and explain foundational coaching practices that enhance client outcomes.
- Understand the importance of a strong coaching relationship based on trust, transparency, and curiosity.
- Develop the ability to create client-centered coaching conversations by following the client's lead.
- Practice asking concise, impactful questions that unlock client insights and inspire action.
- Learn techniques for maintaining focus on the client's vision, goals, and progress.

## Chapter 5: Coaching Tips and Truths

Over the years, we have found that certain coaching practices consistently lead to impactful conversations. These foundational tips help surface core issues, accelerate the client's progress, maintain focus on the client, and foster meaningful growth. As you review the following 15 tips, consider which ones resonate most with you and how they might enhance your effectiveness as a coach.

### **TIP 1: Build a strong coaching relationship.**

Establishing a trusting, confidential relationship is the cornerstone of effective coaching. Focus on the client's needs, aspirations, and challenges rather than your own agenda. A strong coaching relationship is built on transparency, trust, and genuine curiosity. When clients feel safe and supported, they are more likely to explore new ideas, share openly, and move forward.

### **TIP 2: Follow the client's lead.**

Coaching is a partnership. Begin sessions by asking, "What would you like to focus on today?" Let the client set the agenda, pace, and depth of the conversation. This approach ensures the coaching remains relevant and aligned with the client's goals. Avoid introducing topics that the client hasn't explicitly mentioned.

### **TIP 3: Make the client the hero.**

Help the client identify their vision for the future, navigate challenges, and celebrate successes. Your role as a coach is to guide, not to lead. When the coach becomes the focal point of the conversation, it shifts from coaching to consulting or mentoring. Keep the spotlight on the client's journey and growth.

### **TIP 4: Leverage the client's vision to spark transformation.**

A clear vision is a powerful motivator. Help clients articulate what they want to achieve and why it matters to them. Ask questions that connect their immediate actions to their long-term aspirations. Support them in breaking their vision into manageable, actionable steps.

**TIP 5: Foster meaningful change.**

Coaching is about progress. Help clients set intentions, define next steps, and track their development. Encourage them to reflect on shifts in their attitudes, behaviors, and approaches. Even small changes can create momentum toward their larger goals.

**TIP 6: Identify the right focus.**

Ensure each session addresses the client's most pressing issues. Avoid assumptions by asking clarifying questions like, "What makes this a priority for you?" and "What else might be influencing this situation?" This exploration helps uncover the true focus of the conversation.

**TIP 7: Prioritize questions over answers.**

Coaching is about unlocking the client's insights, not providing solutions. Powerful questions create momentum, open new possibilities, and inspire action. For example:

- "What's one possibility you haven't explored yet?"
- "If you had no constraints, what would you do?"

**TIP 8: Use concise questions for deeper impact.**

Short, focused questions often yield the most powerful responses. Aim for questions that are 6–8 words long and allow the client space to reflect.

**TIP 9: Avoid overexplaining your questions.**

Let questions stand on their own without providing context or explanation. Overexplaining can inadvertently guide the client toward your perspective rather than their own insights.

**TIP 10: Create space between sessions.**

Allow time to reset and prepare between coaching sessions. A short walk, reflection, or stretching can help you enter each session with focus and energy.

**TIP 11: Smile and maintain presence during virtual sessions.**

Smiling, even when on the phone or Zoom, creates warmth and engagement. Stay present, enjoy the process, and focus on the client's strengths and potential.

**TIP 12: Share observations, not interpretations.**

Offer neutral observations using statements like:

- "I noticed you paused before answering that question."
  - "Your tone shifted when you mentioned this topic."
- These comments encourage reflection without imposing judgment or assumptions.

**TIP 13: Stretch and inspire action.**

Challenge clients to move beyond their comfort zones by asking questions that inspire experimentation and growth. Encourage them to reflect on their learning and take steps toward meaningful change.

**TIP 14: Encourage pre-work and follow-up tasks.**

Assign tasks that deepen the client's reflection and progress, such as identifying resources, listing potential supporters, or practicing new skills. Pre-work and follow-up activities help maintain momentum between sessions.

**TIP 15: Reflect on each session's impact.**

End sessions by asking, "What was most helpful for you today?" This question provides insight into the client's learning and highlights areas for future focus. It also offers feedback on your coaching approach.

## Chapter 5: Assignments

- 1 | Reflect on a time when you felt supported in achieving a personal or professional goal. What elements of that experience can inform your coaching practice?**

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- 2 | Describe how you might establish trust and transparency in your first coaching session with a new client.**

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- 3 | Write five concise (6–8 word) questions that you could use to explore a client’s goals.**

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- 4 | Why is it important to let clients set the agenda for coaching conversations? How might you handle a session where the client seems unsure about what they want to discuss?**

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**5 | Review a recorded coaching session (real or hypothetical). Identify moments where the coach's questions created momentum or revealed new possibilities for the client. What made those questions effective?**

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## Chapter Objectives

By the end of this chapter, you will:

- Understand the foundational traits and competencies necessary for effective coaching.
- Learn how to build trust, connect, and adapt to diverse client needs.
- Master active listening, inquiry, and feedback techniques to support client growth.
- Develop the ability to remain neutral, set boundaries, and maintain professional standards.
- Explore advanced skills such as cross-cultural insight, strategic thinking, and creative brainstorming.

## Chapter 6: Develop Your Coaching Capacities

Developing Coaching Capacities Coaching is both an immediately applicable skill and a lifelong craft that requires ongoing refinement. This chapter focuses on key competencies and traits that contribute to a coach's ability to inspire meaningful transformation in their clients.

### Key Capacities for Effective Coaching

1. **Self-Knowledge:** Coaches must understand their own values, preferences, and triggers. Awareness of how personal traits influence interactions ensures a more authentic and effective coaching presence.
2. **Ability to Be Present:** Full attention is vital in coaching. Setting aside distractions, internal critiques, and personal concerns allows coaches to focus entirely on the client.
3. **Ability to Connect:** Building meaningful connections requires respect, adaptability, and understanding of different cultural norms and learning styles.
4. **Building Trust and Respect:** Trust and respect develop through professionalism, confidentiality, and consistent demonstration of competence.
5. **Matching Personal Style with Client Style:** Coaches should align their communication and energy levels with the client's preferences, adjusting when necessary to support progress.
6. **Active Listening:** Listening involves not just hearing words but interpreting underlying emotions, values, and unspoken concerns. Coaches should also reflect and clarify to ensure understanding.
7. **Effective Inquiry:** Asking purposeful, open-ended questions guides clients toward deeper self-awareness and problem-solving.

8. **Feedback and Adaptability:** Coaches must offer constructive feedback when appropriate and be open to receiving feedback themselves, modeling flexibility and growth.
9. **Managing the Desire to Give Advice:** Coaching emphasizes guiding clients to discover their own solutions rather than offering direct advice.
10. **Willingness to Challenge:** Knowing when and how to challenge clients can inspire breakthroughs. Challenges should be respectful, timely, and aligned with the client's readiness.
11. **Sharing Perspectives:** Coaches offer alternative viewpoints when beneficial, ensuring that the focus remains on the client's needs and goals.
12. **Neutrality and Objectivity:** Effective coaches remain neutral on sensitive topics, avoiding the imposition of personal beliefs or biases.
13. **Creative Brainstorming:** Brainstorming helps clients explore innovative ideas in a non-judgmental space, fostering creativity and problem-solving.
14. **Empathy:** Demonstrating understanding and care while maintaining forward momentum creates a supportive yet productive coaching environment.
15. **Professional Standards and Boundaries:** Coaches must uphold high standards, including punctuality, confidentiality, and clear communication. Maintaining appropriate boundaries is critical to the integrity of the coaching relationship.
16. **Understanding Client Context:** Familiarity with the client's professional and personal environment enhances the relevance and effectiveness of coaching strategies.
17. **Cross-Cultural Insight:** Awareness of cultural dynamics and sensitivities fosters inclusivity and supports clients from diverse backgrounds.

## Chapter 6: Assignments

- 1 | What steps can you take to enhance your self-awareness and understand how your personality might influence your coaching approach?**

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- 2 | Describe a situation where maintaining presence was challenging for you. How might you address similar challenges in a coaching session?**

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- 3 | Explain the importance of aligning your communication style with a client's preferences. Provide an example of how you might adapt to a client's needs.**

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- 4 | How can active listening and effective inquiry work together to create deeper client engagement and insight? Share a specific example.**

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**5 | Discuss the role of empathy in coaching. How can a coach balance showing understanding while encouraging a client to take action?**

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## Chapter Objectives

By the end of this chapter, you will:

- Identify and address limiting beliefs that may hinder the development of a coaching practice.
- Define a clear business niche, including target audience and unique value propositions.
- Understand the steps and legal requirements for forming and structuring a coaching business.
- Learn foundational marketing principles, including branding, pricing strategies, and online presence.
- Explore practical methods for defining and measuring personal and professional success.

## Chapter 7: Marketing Your Coaching Business

**Disclaimer:** The strategies shared in this chapter stem from personal experience, acquired knowledge, and expert advice. They serve as a starting point for building your coaching practice and are not a comprehensive guide to marketing.

### Section 1: Addressing Limiting Beliefs

We all have internal barriers—voices in our minds that tell us success is out of reach or our goals are unattainable. These limiting beliefs may stem from past experiences, societal expectations, or self-doubt. Recognizing and addressing these beliefs is critical for building the courage and confidence needed to establish a thriving coaching practice.

#### Questions to Reflect On:

- What are your dreams, both big and small?
- What specific beliefs or fears hold you back from pursuing them?
- How do you define success for yourself?
- What are your financial and client-based goals for your coaching practice?
- How long do you envision it will take to achieve these goals?

### Section 2: Defining Your Niche

A well-defined niche is the cornerstone of a successful coaching business. Narrowing your focus allows you to become an expert in a specific area, differentiating you from competitors. Start by reflecting on your passions, skills, and market needs. Research your competition to identify gaps and opportunities.

#### Steps to Define Your Niche:

1. **Identify Your Passion** – What excites you most about coaching?
2. **Analyze Market Needs** – Research what clients in your target market are seeking.
3. **Set Yourself Apart** – Determine what makes you uniquely qualified to address these needs.
4. **Craft Your Elevator Speech** – Develop concise, compelling statements that highlight your expertise.

### Section 3: Practical Steps for Business Formation

Building a coaching practice requires a solid business foundation. Incorporating your business provides legal protections, tax benefits, and credibility.

#### Steps to Get Started:

1. **Choose a Business Structure** – Options include LLC, S-Corp, or other forms of incorporation. Consult with a tax professional to determine the best fit.
2. **Register Your Business** – Check your state's guidelines for name registration, apply for an EIN, and obtain necessary licenses.
3. **Open a Business Bank Account** – Separate personal and business finances to maintain clear financial records.
4. **Establish Business Credit** – Use resources like DUNS and NAV to build your business credit profile.

### Section 4: Embracing Technology and Marketing

Technology and marketing are essential for scaling a modern coaching practice.

- **Website:** Create a user-friendly site with clear messaging and a professional design.
- **Social Media:** Leverage platforms to connect with potential clients and showcase your expertise.
- **Email Funnels:** Offer free resources in exchange for email addresses to generate leads.
- **Analytics:** Use tools like Google Analytics to track website traffic and measure marketing effectiveness.

### Section 5: Visualizing Success

Success is subjective and deeply personal. Clearly defining your vision provides direction and motivation. Use established models like Michael Gerber's framework from *The E-Myth* to understand the evolution of business roles:

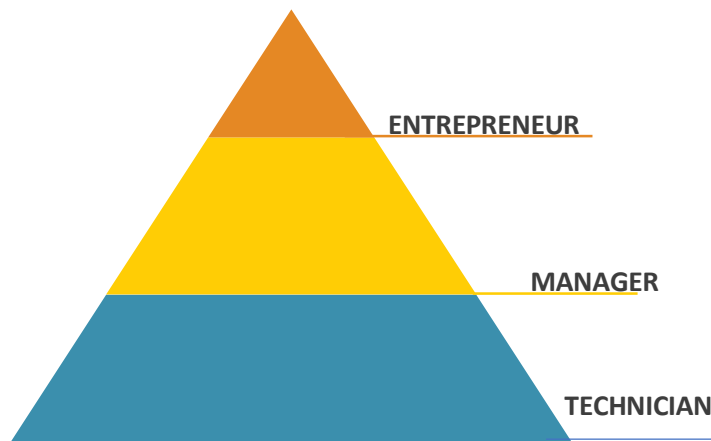
- **Technician:** Managing day-to-day tasks.

- Manager: Overseeing operations and delegating tasks.
- Entrepreneur: Designing systems and focusing on long-term strategy.

#### Key Questions:

- How do you define success?
- What steps will you take to achieve your goals?
- How can you transition from technician to entrepreneur over time?

## THE “E” MYTH\*



*\*The “E” Myth Revisited by Michael E. Gerber*

#### Bill Baren's Five Stages of Business Success

Renowned business coach Bill Baren has outlined five distinct stages of business growth. Each stage represents a unique phase of entrepreneurial development: **Establish, Expand, Leverage, Leadership, and Legacy**. Below is a detailed guide to navigating these stages and building a thriving coaching practice.

##### Stage 1: Establish (\$0 – \$39,999)

The first stage is about laying a solid foundation for your business. Here’s how:

1. **Master Client Acquisition:** Build expertise in finding clients. Start by networking with individuals who can connect you to potential clients. Create a list of possible connectors and follow through on contacting them. Leverage social media by creating “funnels” to collect potential leads.
2. **Develop a Bold Vision:** Dream big! Without a compelling vision, your coaching practice may stagnate. Once you’ve articulated your vision, design actionable plans to achieve it.
3. **Implement Proven Systems:** Avoid the temptation to reinvent the wheel. Adopt and adapt existing systems to save time and effort. Focus your energy on what matters most—serving your clients.

4. **Learn from Others:** As the proverb says, "Iron sharpens iron." Build relationships with experienced coaches, seek their feedback, and learn from their journey.
5. **Define Your Niche:** Clarify your area of expertise to determine your ideal client base. This focus will guide your marketing and service offerings.
6. **Craft a Compelling Marketing Message:** Develop an "elevator pitch" that succinctly communicates who you are and what you offer.
7. **Set Up a Business Account:** Once you've chosen your business structure, open a dedicated business account to manage your finances professionally.

## **Stage 2: Expand (\$40,000 – \$69,999)**

In this phase, focus on growth and visibility:

1. **Expand Your Marketing Efforts:** Reach new audiences and amplify your message through various channels.
2. **Get Comfortable with Visibility:** Decide how much visibility you want as a coach and balance this with other roles you may hold, such as ministry.
3. **Overcome Limiting Beliefs:** Success doesn't eliminate doubts or Impostor Syndrome; instead, it may amplify them. Addressing these internal barriers is critical to sustained growth.
4. **Celebrate Wins and Pursue New Clients:** Regularly acknowledge your achievements while remaining proactive in attracting new clients.
5. **Refine Your Message and Niche:** Be open to evolving your niche as opportunities arise. Don't cling to a market that limits your potential.
6. **Develop Your Signature Talk:** Move beyond an elevator pitch to create a signature talk—a compelling presentation that showcases your expertise and serves as a branding tool.
7. **Be Confident in Your Offerings:** Believe in the value of your services and communicate this with confidence.
8. **Hire a Virtual Assistant:** Delegate administrative tasks to free up your time and demonstrate your business's growth.

## **Stage 3: Leverage (\$70,000 – \$250,000)**

The focus in this stage is scalability:

1. **Optimize Systems:** Invest in systems and tools that save time and reduce costs, allowing you to work smarter, not harder.

2. **Shift from Operator to Entrepreneur:** Transition from running day-to-day operations to leading your business strategically.
3. **Leverage Webinars and Live Events:** Explore opportunities to become a sought-after speaker, such as joining the TED Talk circuit or participating in high-profile industry events.
4. **Offer Packages:** Create service packages that provide value and convenience to your clients while increasing your revenue potential.

#### **Stage 4: Leadership (\$250,000 – \$1M)**

In this phase, focus on becoming a thought leader:

1. **Influence Your Industry:** Establish yourself as an influential voice in the coaching world. Share insights, lead initiatives, and mentor others.

#### **Stage 5: Legacy (\$1M – \$10M)**

The final stage is about creating a lasting impact:

1. **Build a Business Beyond Yourself:** Develop a business model that thrives without your direct involvement, ensuring its longevity and influence for generations to come.

#### **Insights on Marketing from Coaching Professionals**

“So often coaches fail before they start because they do not have a concrete plan for succeeding.” This quote from a coach I interviewed highlights the critical importance of having a clear plan and adequate resources to succeed. Over the past year, during discussions within my ICF Chapter and coaching network, many coaches have emphasized the necessity of clarity in their business plans, next steps, and personal skills. Below is a summary of their insights and recommendations for thriving in this field. Several coaches noted the low barriers to entry for starting a coaching business. With a computer, basic software, and solid training in coaching principles, you can launch your practice. As your client base grows, you can invest in better tools and technology. Most coaches agreed that creating an engaging website and a professional LinkedIn presence is vital. Potential clients need to see who you are, what you offer, and why they should work with you. Coaches recommended keeping websites simple, client-focused, and engaging, often featuring testimonials, welcome videos, and straightforward scheduling tools. Sending regular emails to clients—past, present, and potential—was also highlighted as an effective way to stay visible and relevant.

This document distills insights shared by coaches into five key themes to help you develop a sustainable, profitable coaching business. May you find their wisdom beneficial and applicable to your journey.

#### **THEME 1: Set Your Mind Right and Build a Support Network**

Coaches were candid about how fear, lack of confidence, and inadequate planning can derail success. Here are their top recommendations:

1. **Start Coaching Now:** Whether paid or pro bono, begin coaching regularly. The more you practice, the faster you’ll learn and grow. Ask clients for referrals, offer free introductory

sessions, or create mini-retreats to showcase your skills.

2. **Understand Your Market:** Identify what your target audience values and is willing to pay for. Track pain points, challenges, and opportunities to align your offerings with client needs.
3. **Embrace Success and Failure:** Treat every experience as a learning opportunity. Celebrate successes and analyze failures to refine your approach. Consider hiring a coach to support your growth.
4. **Learn from Competitors:** View other coaches as sources of inspiration rather than competition. Study their strategies, services, and pricing, and adapt best practices to your business.
5. **Prepare for Rejection:** Not every potential client will say “yes.” Stay persistent and focus on building relationships with those who align with your offerings.
6. **Assess Your Skills and Delegate:** Identify your strengths, areas for improvement, and tasks to outsource. Build a team to handle administrative, marketing, or technical needs.
7. **Join an ICF Chapter:** Connect with a network of supportive, like-minded professionals who can provide guidance, encouragement, and resources.
8. **Work with a Coach:** Every coach should have a coach. Find someone who can guide and challenge you as you grow your business.

## **THEME 2: Develop and Refine Your Coaching Niche**

Finding a profitable niche is essential for building a successful coaching business. Here are insights from coaches:

- “I developed my niche around what I love, what I’m good at, and what people are willing to pay for.”
- “My business took off when I focused on serving a specific audience rather than trying to coach everyone.”
- “A clear niche simplifies marketing and makes it easier to connect with the right clients.”

Questions to help define your niche:

- Who is your ideal client?
- What unique value can you provide?
- What makes your coaching approach distinct?
- How can your services address specific client needs?

Developing a niche enables you to tailor your services and marketing efforts, ultimately creating deeper connections and more significant impact.

### **THEME 3: Build Your In-Person and Virtual Team**

Successful coaches recognize the need for additional support to focus on what they do best. Here's how to build an effective team:

- Hire freelancers for administrative, marketing, or technical tasks.
- Conduct video interviews and implement trial periods for new hires.
- Create clear agreements to set expectations and ensure compliance with legal and IRS requirements.

Delegating tasks allows you to concentrate on coaching and growing your business while ensuring essential functions are managed efficiently.

### **THEME 4: Create and Regularly Update a Written Plan**

A business plan serves as a roadmap for your coaching practice. Coaches highlighted the importance of keeping plans concise and actionable. Key components include:

1. **Executive Summary:** Introduce your business, mission, and target audience.
2. **Products and Services:** Clearly describe your offerings and their benefits.
3. **Business Stage:** Define where you are in your journey and outline key goals.
4. **Marketing Strategies:** Detail how you'll reach your ideal clients.
5. **Financial Goals:** Specify revenue targets and expenses.

Regularly review and update your plan to reflect current realities and ensure it remains a useful tool for guiding your business decisions.

### **THEME 5: Learn from Mistakes and Build Consistent Habits**

Avoiding common pitfalls can save time and resources. Here are five mistakes to watch out for:

1. **Procrastinating with Planning:** Set a deadline for planning and move into action.
2. **Ignoring Financials:** Understand your cash flow and create a realistic budget.
3. **Trying to Please Everyone:** Focus on a specific audience rather than a broad market.
- 4.
5. **Underdeveloping Offerings:** Clearly define and communicate the value of your services.
6. **Neglecting Consistency:** Build habits around outreach, client nurturing, and operational systems.



Coaches who succeeded emphasized the importance of maintaining consistent efforts and regularly revisiting their plans to stay aligned with their goals.

## Final Thoughts

*“When I began my coaching journey, I often felt overwhelmed by how much I didn’t know or understand. I soon realized that this is a universal experience for many entrepreneurs. By applying the principles I learned in my coaching training to my business processes, I overcame those challenges.*

*For me, success started with clearly defining my present situation and imagining my desired future. From there, I set achievable goals and took the first step. Along the way, I created S.M.A.R.T. goals, adjusted course when necessary, and leaned on accountability partners and a business coach for guidance.*

*Most importantly, I gave myself grace and patience. I learned that there’s no such thing as failure—only opportunities to grow. What others call failure is simply the chance to learn something new.”*

- Felix

## Chapter 7: Assignments

- 1 | Reflect on a limiting belief you hold. How might it impact your ability to build a coaching practice, and how can you address it?**

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- 2 | What is your niche as a coach? Describe the passions, skills, and market needs that led to your decision.**

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- 3 | Outline the practical steps you need to take to incorporate your business. What resources will you consult to ensure a smooth process?**

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- 4 | Develop a 30-second elevator speech that communicates your niche and value proposition to potential clients.**

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**5 | Define your vision of success. What measurable goals will you set, and how will you track your progress toward achieving them?**

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# Appendix A: Glossary of Common Coaching Terms

## A

- **Accountability Partner:** Someone who holds a client responsible for commitments and goals, often used to reinforce behavioral change.
- **Active Listening:** The practice of fully concentrating, understanding, and responding thoughtfully during conversations, a core competency for ICF coaches.
- **Action Plan:** A structured outline of steps a client will take to achieve specific goals.
- **Assessment Tools:** Instruments used to evaluate an individual's skills, personality, emotional intelligence, or leadership style (e.g., MBTI, DiSC, CliftonStrengths).

## B

- **Brainstorming:** Collaborative idea generation to explore solutions or possibilities.
- **Boundaries:** Agreed-upon limits for the coaching relationship, ensuring ethical and professional interactions.

## C

- **Capability Building:** Developing new skills and competencies to enhance personal or organizational effectiveness.
- **Coaching Agreement:** A document that outlines the scope, objectives, and structure of the coaching relationship, as required by ICF ethics.
- **Coaching Presence:** A coach's ability to be fully engaged, adaptable, and present during coaching sessions, an ICF core competency.
- **Confidentiality:** Ensuring privacy and discretion in coaching conversations, a fundamental ICF ethical principle.

## D

- **Discovery Session:** The initial meeting between coach and client to identify goals, challenges, and desired outcomes.
- **Delegation:** The practice of assigning tasks and responsibilities to others to enhance efficiency and focus on strategic priorities.

## E

- **Emotional Intelligence (EI):** The ability to recognize, understand, and manage emotions in oneself and others, often a focus in executive coaching.
- **Ethical Guidelines:** Standards set by organizations like ICF to govern the conduct of professional coaches.
- **Executive Presence:** The blend of confidence, communication skills, and gravitas that inspires others, often a coaching goal for leaders.

## F

- **Feedback:** Constructive input provided by the coach or client to foster growth and improvement.
- **Focus Areas:** Key themes or priorities identified for coaching, such as leadership, communication, or work-life balance.

## G

- **GROW Model:** A popular coaching framework with four stages: Goal, Reality, Options, and Will/Way Forward.
- **Goal-Setting:** The process of defining specific, measurable, achievable, relevant, and time-bound (SMART) objectives.

## H

- **High-Potential Employees (HiPos):** Individuals identified as having the potential to assume leadership roles.
- **Holistic Coaching:** An approach that considers the client's personal and professional life as interconnected.

## I

- **ICF Core Competencies:** A set of skills, behaviors, and practices defined by the International Coaching Federation as essential for effective coaching.
- **Inquiry:** Thought-provoking questions used by the coach to deepen the client's self-awareness and insights.
- **Integrity:** Adhering to moral and ethical principles, central to the ICF Code of Ethics.

## K

- **Key Performance Indicators (KPIs):** Metrics used to measure the success of coaching outcomes or business performance.
- **Knowledge Sharing:** The exchange of insights, strategies, or expertise between the coach and client or within organizations.

## L

- **Leadership Development:** A focus area in coaching that enhances a client's ability to lead effectively.
- **Limiting Beliefs:** Internalized thoughts or assumptions that hinder personal or professional growth, often addressed in coaching sessions.

## M

- **Mentor Coaching:** Coaching provided to another coach to improve their skills, often required for ICF credentialing.
- **Mindfulness:** A practice of staying present and aware, often integrated into coaching to improve focus and decision-making.
- **Motivational Interviewing:** A conversational technique to help clients resolve ambivalence and

commit to change.

## N

- **Neuroscience in Coaching:** The application of brain science to enhance understanding of behavior, habits, and change processes.
- **Niche:** A specialized area of coaching, such as executive, career, or wellness coaching.

## O

- **Observations:** Feedback from the coach based on what they notice about the client's behavior, language, or patterns.
- **Organizational Development (OD):** Strategies aimed at improving an organization's effectiveness and culture, often linked to executive coaching.

## P

- **Powerful Questioning:** The use of open-ended, thought-provoking questions to evoke new insights, an ICF core competency.
- **Psychometrics:** Tools used to measure mental capabilities and behavioral styles, such as Hogan Assessments or EQ-i 2.0.

## R

- **Reflection:** Encouraging the client to think deeply about their experiences to gain insight.
- **ROI (Return on Investment):** Measuring the tangible and intangible benefits of coaching relative to its cost.

## S

- **Self-Awareness:** The ability to recognize and understand one's emotions, values, and behaviors, often a focus in coaching.
- **Stakeholders:** Individuals or groups impacted by the client's decisions or coaching outcomes, such as team members or executives.

## T

- **Transformation:** A profound change in mindset or behavior resulting from the coaching process.
- **Trust and Intimacy:** Building a safe, supportive relationship with the client, an ICF core competency.

## U

- **Upskilling:** Acquiring new skills or enhancing existing ones to meet evolving professional demands.

## V

- **Values Clarification:** Helping clients identify and align their actions with their core values.
- **Visioning:** Assisting clients in imagining and articulating their desired future state.

## W

- **Wheel of Life:** A coaching tool used to evaluate and balance various aspects of a client's life.

## Y

- **Your Unique Coaching Proposition (UCP):** A coach's distinct value offering that sets them apart in the marketplace.

# Appendix B: ICF Ethical Guidelines / Standards

The International Coaching Federation (ICF) Code of Ethics is composed of five (5) main parts:

1. Introduction
2. Key Definitions
3. ICF Core Values and Ethical Principles
4. Ethical Standards
5. Pledge

## 1. Introduction

The ICF Code of Ethics describes the core values of the International Coaching Federation (ICF Core Values), ethical principles and ethical standards of behavior for all ICF Professionals (see definitions). Meeting these ICF ethical standards of behavior is the first of the ICF core coaching competencies (ICF Core Competencies) – “Demonstrates ethical practice: understands and consistently applies coaching ethics and standards.”

The ICF Code of Ethics serves to uphold the integrity of ICF and the global coaching profession by:

- Setting standards of conduct consistent with ICF Core Values and ethical principles.
- Guiding ethical reflection, education and decision-making.
- Adjudicating and preserving ICF coach standards through the ICF Ethical Conduct Review (ECR) process.
- Providing the basis for ICF ethics training in ICF-accredited training programs.

The ICF Code of Ethics applies when ICF Professionals represent themselves as such, in any kind of coaching-related interaction. This is regardless of whether a coaching relationship (see definitions) has been established. This Code articulates the ethical obligations of ICF Professionals who are acting in their different roles as coach, coach supervisor, mentor coach, trainer or student coach-in-training, or serving in an ICF Leadership role, as well as Support Personnel (see definitions).

Although the Ethical Conduct Review (ECR) process is only applicable to ICF Professionals, as is the Pledge, the ICF Staff are also committed to ethical conduct and the Core Values and Ethical Principles that underpin this ICF code of ethics

The challenge of working ethically means that members will inevitably encounter situations that require responses to unexpected issues, resolution of dilemmas and solutions to problems. This Code of Ethics is intended to assist those persons subject to the Code by directing them to the variety of ethical factors that may need to be taken into consideration and helping to identify alternative ways of approaching ethical behavior.

ICF Professionals who accept the Code of Ethics strive to be ethical, even when doing so involves making difficult decisions or acting courageously.

## 2. Key Definitions

- **Client** - the individual or team/group being coached, the coach being mentored or supervised,



or the coach or the student coach being trained.

- **Coaching**- partnering with Clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.
- **Coaching Relationship** - a relationship that is established by the ICF Professional and the Client(s)/Sponsor(s) under an agreement or a contract that defines the responsibilities and expectations of each party.
- **Code** - ICF Code of Ethics
- **Confidentiality** - protection of any information obtained around the coaching engagement unless consent to release is given.
- **Conflict of Interest** - a situation in which an ICF Professional is involved in multiple interests where serving one interest could work against or be in conflict with another. This could be financial, personal or otherwise.
- **Equality** - a situation in which all people experience inclusion, access to resources and opportunity, regardless of their race, ethnicity, national origin, color, gender, sexual orientation, gender identity, age, religion, immigration status, mental or physical disability, and other areas of human difference.
- **ICF Professional** - individuals who represent themselves as an ICF Member or ICF Credential-holder, in roles including but not limited to Coach, Coach Supervisor, Mentor Coach, Coach Trainer and Student of Coaching
- **ICF Staff** - the ICF support personnel who are contracted by the managing company that provides professional management and administrative services on behalf of ICF.
- **Internal Coach** - an individual who is employed within an organization and coaches either part-time or full-time the employees of that organization.
- **Sponsor** - the entity (including its representatives) paying for and/or arranging or defining the coaching services to be provided.
- **Support Personnel** - the people who work for ICF Professionals in support of their Clients.
- **Systemic equality** - gender equality, race equality and other forms of equality that are institutionalized in the ethics, core values, policies, structures, and cultures of communities, organizations, nations and society.

### 3. **ICF Core Values and Ethical Principles**

The ICF Code of Ethics is based on the ICF Core Values ([link](#)) and the actions that flow from them. All values are equally important and support one another. These values are aspirational and should be used as a way to understand and interpret the standards. All ICF Professionals are expected to showcase and propagate these Values in all their interactions.

#### 4. **Ethical Standards**

The following ethical standards are applied to the professional activities of ICF Professionals:

##### **Section I – Responsibility to Clients**

As an ICF Professional, I:

1. Explain and ensure that, prior to or at the initial meeting, my coaching Client(s) and Sponsor(s) understand the nature and potential value of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement.
2. Create an agreement / contract regarding the roles, responsibilities and rights of all parties involved with my Client(s) and Sponsor(s) prior to the commencement of services.
3. Maintain the strictest levels of confidentiality with all parties as agreed upon. I am aware of and agree to comply with all applicable laws that pertain to personal data and communications.
4. Have a clear understanding about how information is exchanged among all parties involved during all coaching interactions.
5. Have a clear understanding with both Clients and Sponsors or interested parties about the conditions under which information will not be kept confidential (e.g., illegal activity, if required by law, pursuant to valid court order or subpoena; imminent or likely risk of danger to self or others; etc.). Where I reasonably believe one of the above circumstances is applicable, I may need to inform appropriate authorities.
6. When working as an Internal Coach, manage conflicts of interest or potential conflicts of interest with my coaching Client(s) and Sponsor(s) through coaching agreement(s) and ongoing dialogue. This should include addressing organizational roles, responsibilities, relationships, records, confidentiality and other reporting requirements.
7. Maintain, store and dispose of any records, including electronic files and communications, created during my professional interactions in a manner that promotes confidentiality, security and privacy, and complies with any applicable laws and agreements. Furthermore, I see to make proper use of emerging and growing technological developments that are being used in coaching services (technology-assisted coaching services) and to be aware of how various ethical standards apply to them.
8. Remain alert to indications that there might be a shift in the value received from the coaching relationship. If so, make a change in the relationship or encourage the Client(s) / Sponsor(s) to seek another coach, seek another professional or use a different resource.
9. Respect all parties' right to terminate the coaching relationship at any point for any reason during the coaching process subject to the provisions of the agreement.
10. Am sensitive to the implications of having multiple contracts and relationships with the same Client(s) and Sponsor(s) at the same time in order to avoid conflict of interest

situations.

11. Am aware of and actively manage any power or status difference between the Client and me that may be caused by cultural, relational, psychological or contextual issues.
12. Disclose to my Clients the potential receipt of compensation and other benefits I may receive for referring my Clients to third parties.
13. Assure consistent quality of coaching regardless of the amount or form of agreed compensation in any relationship.

## **Section II – Responsibility to Practice and Performance**

As an ICF Professional, I:

14. Adhere to the ICF Code of Ethics in all my interactions. When I become aware of a possible breach of the Code by myself or I recognize unethical behavior in another ICF Professional, I respectfully raise the matter with those involved. If this does not resolve the matter, I refer to a formal authority (e.g., ICF Staff) for resolution.
15. Require adherence to the ICF Code of Ethics by all Support Personnel.
16. Commit to excellence through continued personal, professional and ethical development.
17. Recognize my personal limitations or circumstances that may impair, conflict with or interfere with my coaching performance or my professional coaching relationships. I will reach out for support to determine the action to be taken and, if necessary, promptly seek relevant professional guidance. This may include suspending or terminating my coaching relationship(s).
18. Resolve any conflict of interest or potential conflict of interest by working through the issue with relevant parties, seeking professional assistance, or suspending temporarily or ending the professional relationship.
19. Maintain the privacy of ICF Members and use the ICF Member contact information (email addresses, telephone numbers, and so on) only as authorized by ICF or the ICF Member.

## **Section III – Responsibility to Professionalism**

As an ICF Professional, I:

20. Identify accurately my coaching qualifications, my level of coaching competency, expertise, experience, training, certifications and ICF Credentials.
21. Make verbal and written statements that are true and accurate about what I offer as an ICF Professional, what is offered by ICF, the coaching profession and the potential value of coaching.
22. Communicate and create awareness with those who need to be informed of the ethical responsibilities established by this Code.

23. Hold responsibility for being aware of and setting clear, appropriate and culturally sensitive boundaries that govern interactions, physical or otherwise.
24. Do not participate in any sexual or romantic engagement with Client(s) or Sponsor(s). I will be ever mindful of the level of intimacy appropriate for the relationship. I take the appropriate action to address the issue or cancel the engagement.

#### **Section IV – Responsibility to Society**

As an ICF Professional, I:

25. Avoid discrimination by maintaining fairness and equality in all activities and operations, while respecting local rules and cultural practices. This includes, but is not limited to, discrimination on the basis of age, race, gender expression, ethnicity, sexual orientation, religion, national origin, disability or military status.
26. Recognize and honor the contributions and intellectual property of others, only claiming ownership of my own material. I understand that a breach of this standard may subject me to legal remedy by a third party.
27. Am honest and work within recognized scientific standards, applicable subject guidelines and boundaries of my competence when conducting and reporting research.
28. Am aware of my and my clients' impact on society. I adhere to the philosophy of "doing good" versus "avoiding bad."

#### **5. The Pledge of Ethics of the ICF Professional**

As an ICF Professional, in accordance with the Standards of the ICF Code of Ethics, I acknowledge and agree to fulfill my ethical and legal obligations to my coaching Client(s), Sponsor(s), colleagues and to the public at large. If I breach any part of the ICF Code of Ethics, I agree that ICF in its sole discretion may hold me accountable for so doing. I further agree that my accountability to ICF for any breach may include sanctions, such as mandatory additional coach training or other education, or loss of my ICF Membership and / or my ICF Credential.

For more information on the Ethical Conduct Review (ECR) process, including the links to file a complaint, please visit [coachingfederation.org/ethics](https://coachingfederation.org/ethics).

## Appendix C: 100 Powerful Questions



### 100 Powerful Questions

Dr. Felix C. Villanueva, MCC

## How to use this eBook?

As a new coach, one of the most common requests I receive is for a list of questions that can be carried into coaching sessions. While every coaching interaction is unique, having a resource to spark our thinking can be invaluable. The more questions we have at our disposal, the more potent our ability to guide our clients becomes. This book is designed to serve as just that resource—an inspiration for your coaching practice with powerful questions that can help you dig deeper and foster meaningful conversations.

Before you incorporate these questions into your sessions, I encourage you to take the time to get familiar with their structure, wording, and the intent behind them. While the questions in this book are not exhaustive, they can act as a springboard for creating your own, more personalized questions that resonate with you and your clients.

The book is organized into five distinct categories, each targeting a different aspect of the coaching process:

- [Spiritual or Faith-Based Questions](#)
- [Goal-Oriented Questions](#)
- [Current Reality Questions](#)
- [Possible Options Questions](#)
- [What's Next? Questions](#)

I recommend keeping this book within reach during your sessions. When you're unsure about the next step or need a prompt to guide your conversation, turn to this resource for inspiration. My hope is that this book will not only provide you with a set of powerful questions but will also become a vital tool to enhance your questioning techniques and overall coaching toolkit.

## 100 POWERFUL QUESTIONS

*"If I had only an hour to solve a problem. I would spend 55 minutes trying to ask the right question. Because once I know the right question, it would take me less than five minutes to solve the problem."*

Attributed to Albert Einstein

## SPIRITUALLY-BASED QUESTIONS

### Awareness of Spiritual Journey

1. What does being spiritually aligned mean to you?
2. How do you experience a sense of the divine, sacred, or transcendent in your daily life?
3. What moments in your life have felt deeply meaningful or sacred?

### Purpose and Calling

4. How does your spirituality shape your understanding of your life purpose?
5. What do you feel called to contribute to the world?
6. In what ways are your current goals aligned with your deepest values and beliefs?

### Inner Transformation

7. What practices or habits help you nurture your soul?
8. What is one area of your life where you feel the need for spiritual growth or renewal?
9. What limiting beliefs might be holding you back from living fully in alignment with your faith or values?

### Connection with Others

10. How do your spiritual beliefs influence your relationships with others?
11. What role does forgiveness play in your spiritual practice, and how might it bring healing in your life?
12. How can you embody love, kindness, or compassion more fully in your interactions?

### **Navigating Challenges**

- 13. How has your spirituality helped you navigate difficult times in the past?
- 14. What would faith, trust, or surrender look like in your current challenges?
- 15. How can you shift your perspective to see this challenge as an opportunity for growth?

### **Vision and Legacy**

- 16. What legacy do you hope to leave behind, and how does it reflect your spiritual values?
- 17. If you were living fully in alignment with your spiritual beliefs, what would your life look like?
- 18. How do you want to be remembered by those you love and serve?

### **Connection with the Divine or Sacred**

- 19. How do you make space in your life to listen for divine guidance or inspiration?
- 20. What do you sense the Spirit (or your higher self) is inviting you to do or become at this moment?

## **GOAL-ORIENTED QUESTIONS**

### **Clarifying Vision and Goals**

- 21. What would success look like for you in this situation?
- 22. What do you want to achieve by the end of this coaching relationship?
- 23. How does this goal align with your core values and long-term vision?
- 24. What would you do if you knew you couldn't fail?
- 25. What is the ultimate purpose of achieving this goal for you?

### **Exploring Current Reality**

- 26. Where are you now in relation to this goal?
- 27. What resources, skills, or knowledge do you already have to achieve this goal?
- 28. What obstacles or challenges are you currently facing?
- 29. Who can support or influence you as you work toward this goal?
- 30. What patterns or habits might be holding you back from progress?



### **Developing Strategies and Options**

- 31. What are the possible ways to achieve this goal?
- 32. What are the pros and cons of each option?
- 33. Which action feels most aligned with your values and strengths?
- 34. How can you break this goal into smaller, actionable steps?
- 35. What would you do if you only had 24 hours to make progress on this?

### **Building Commitment and Accountability**

- 36. What's the first step you can take right now to move closer to your goal?
- 37. How will you measure progress toward your goal?
- 38. What systems or routines can you put in place to stay on track?
- 39. Who will you share your progress with, and how often will you check in?
- 40. What will you do to celebrate milestones along the way?

## **CURRENT REALITY QUESTIONS**

### **Current Challenges and Obstacles**

- 41. What specific challenges are you experiencing right now?
- 42. What is not going as planned, and what do you believe is causing that?
- 43. What external factors are impacting your current reality?
- 44. How aligned is your current reality with your values and goals?

### **Strengths and Resources**

- 45. What's working well for you at this moment?
- 46. What resources or tools do you have available to you right now?
- 47. Who or what is influencing your current approach to this situation?
- 48. What's the one thing you feel needs immediate attention?

### **Insights and Learning**

- 49. What patterns or habits do you notice about how you've handled this situation?
- 50. What have you learned from similar situations in the past that might apply here?
- 51. How clear are you about the steps needed to move forward?
- 52. How do you define the problem or opportunity in front of you?

### **Emotional and Relational Impact**

- 53. How do you currently feel about where you are in this situation?
- 54. What emotions are showing up for you as you think about your current situation?
- 55. How are your relationships impacting your current situation?

### **Success and Progress Measurement**

- 56. How are you measuring success in this area of your life?
- 57. If you had to describe your current reality in one sentence, what would it be?
- 58. What do you see as your biggest opportunity right now?

### **Assumptions and Beliefs**

- 59. What assumptions are you making about your current circumstances?
- 60. How do you perceive your current situation in terms of possibilities?

## **POSSIBLE OPTIONS QUESTIONS**

### **Exploring Purpose and Values**

- 61. What core values do you want to guide your decisions moving forward?
- 62. How does this situation align with your larger life goals and vision?
- 63. What deeper purpose do you feel drawn to in this phase of your life?
- 64. How do your values influence the way you see potential options?
- 65. What would it look like for you to fully honor your values in this decision?

### **Clarifying Options**

- 66. What are the various paths you could take to achieve your desired outcome?

- 67. What makes each option appealing to you, and what are the potential challenges of each?
- 68. Which option excites you the most, and why?
- 69. How do your options reflect who you are right now versus who you want to become?
- 70. What might you learn from pursuing one of these paths, even if it doesn't work out as planned?

### **Gaining Perspective**

- 71. How would you advise a close friend if they were in your situation?
- 72. What might your future self tell you about making this decision?
- 73. How does this decision impact your life in both the short and long term?
- 74. What assumptions are you making about each option, and how might they be limiting?
- 75. If you had unlimited resources, how would you approach this challenge?

### **Identifying Potential Obstacles and Resources**

- 76. What internal or external barriers could prevent you from pursuing your preferred option?
- 77. What strengths do you possess that can help you overcome these obstacles?
- 78. Who or what could be a resource for you in implementing your choice?
- 79. What skills do you need to develop to be more confident in this decision?
- 80. How will you stay motivated through the challenges associated with your option?

## **WHAT'S NEXT QUESTIONS**

### **Clarity and Vision**

- 81. What is the one thing you want to focus on right now that will make the biggest impact?
- 82. How would you describe your ideal future?
- 83. What excites you most about what lies ahead?
- 84. What does success look like for you in this moment?
- 85. What beliefs are supporting or limiting your progress toward your goals?

### **Self-Awareness and Reflection**

- 86. What strengths can you leverage more to move forward?
- 87. When you look back, what patterns can you identify that have helped or hindered you?
- 88. How do you want to be remembered in this situation?
- 89. What are you learning about yourself as you work through this?
- 90. What's the most important insight you've had recently?

### **Overcoming Challenges and Resilience**

- 91. What's the greatest challenge you're facing, and how might it be reframed as an opportunity?
- 92. How have you successfully overcome similar obstacles in the past?
- 93. What do you need to let go of to move forward?
- 94. Who or what can support you to move past the barriers you're encountering?
- 95. How can you adjust your approach to make this easier to accomplish?

### **Action and Accountability**

- 96. What is the next step you can take today toward your goal?
- 97. What will make taking action less overwhelming for you right now?
- 98. How will you measure progress as you move forward?
- 99. Who do you need to communicate your progress or challenges to for support?
- 100. What will your first action step be, and when will you take it?

# Appendix D: New Coach Toolbox

## Pre-Session Preparation Guide

### Questions for Clients to Answer Before the Session

1. **What are your main goals for our session?**
  - What specific topics or pressing issues would you like to address?
2. **What outcomes would you like to achieve during our time together?**
  - What would success look like for this session? What key "wins" would be most valuable?
3. **Do you have any documents or information for your coach to review in advance?**
  - Provide relevant reports, plans, or other resources to ensure productive discussions.
4. **What factors are influencing your ability to move forward?**
  - Identify any barriers or enablers affecting your next steps.

### Four Ways to Prepare for Future Coaching Sessions

1. **Pray for discernment and clarity.**
  - Seek guidance, wisdom, and an openness to where God might lead the conversation.
2. **Review your organization's foundational principles.**
  - Revisit your mission, vision, values, and annual goals to align your focus.
3. **Reflect on previous coaching sessions.**
  - Go over notes and key insights to build on past progress.
4. **Generate actionable ideas.**
  - List at least five potential options or paths forward on the topic you wish to explore.

### Nine Reflection Questions to Consider Before Future Sessions

1. **Personal Growth:**
  - What are you learning about yourself and your capacity to lead transformational change?
2. **Spiritual Perspective:**
  - How do you sense God's work in your life, your church, and your community?
3. **Energy Levels:**
  - On a scale of 1-10 (10 being highly energized), how energized do you feel about your life, ministry, and teams?

**4. Recent Achievements:**

- What have been your recent "wins" or bright spots in ministry?

**5. Coaching Process:**

- How satisfied are you with the pace and impact of the coaching process so far?

**6. Focus and Prioritization:**

- Where might you need to refocus your time, energy, attention, and talents moving forward?

**7. Resource Utilization:**

- What existing resources can be leveraged more effectively in the future?

**8. Accountability:**

- What do you want your coach to help you remain accountable for or to keep in focus?

**9. Session Needs:**

- What do you need most from your upcoming coaching session to make it impactful?

## Pre-Work for Coaching Sessions

Coaching sessions can shift from good to great when both coaches and coachees invest time in thoughtful pre-work. The questions and suggestions below are designed to help clients review their progress, identify key topics for discussion, and maximize the impact of their next session.

---

**Name(s):**

**Date of Coaching Meeting:**

**7 Key Questions to Reflect On**

**1. Accomplishments:**

- What have you achieved since our last meeting?

**2. Gratitude and Learning:**

- What bright spots are you grateful for? What are you learning about yourself and your environment?

**3. Priorities:**

- What tasks or goals remain unfinished but are still priorities?

**4. Behavioral Adjustments:**

- Based on recent outcomes, what do you plan to keep doing, stop doing, or start doing?

**5. Emerging Insights:**

- What new ideas, challenges, or opportunities have surfaced recently?

**6. Session Focus:**

- What topics or issues do you wish to discuss during our next coaching session?

**7. Goals for the Session:**

- What specific outcomes or takeaways do you hope to accomplish in the upcoming session?

**4 Suggestions for Effective Pre-Work**

**1. Review Past Notes:**

- Before completing this form, revisit coaching notes and correspondence to identify unresolved issues or recurring themes.

**2. Organize Your Insights:**

- Decide where to archive these reflections for future reference. Create a dedicated coaching folder if you don't already have one.

**3. Submit in Advance:**

- Share your responses with your coach a few days before the next session to give them time to prepare.

**4. Collaborate with Your Team:**

- If you're part of a coaching team, share your reflections with team members before the session to foster alignment and shared accountability.

**Questions to Ask During the First Coaching Session**

**Questions to Discern Coaching Focus**

- "So, how have you been?"  
*(A great open-ended question to start the conversation and identify key areas to explore.)*
- "What would a home run in your life look like this week?"  
*(Encourage the client to dream big and create a list of priorities.)*
- "What's been working for you since our last session?"
- "What hasn't been working for you?"
- "What do you need most from me today?"
- "What have been your highlights since our last session? And your lowlights?"
- "I'm curious, how do you think I can help you this week?"

**Questions to Define Session Outcomes**

- "What, if you got it finished this week, would make you jump for joy?"
- "What is the biggest change you are willing to make today?"
- "What would you love to have happen by the end of this session?"
- "What would you most like to get out of the next 30/45/60 minutes?"
- "What would be the most helpful thing for you to take away from this session?"
- "What, if you worked on it right now, would really put a smile on your face?"
- "Imagine you've just had an ideal week. What three things did you complete?"
- "What could we work on that would help you the most over the next few weeks?"
- "What would you be disappointed if we didn't work on today?"

### Additional Questions to Raise During the First Session

- "Tell me about yourself."
- "What specific goals would you like to achieve by working with a coach?"
- "What have you already done towards your goals?"
- "How will we evaluate the success of our coaching partnership?"
- "What kind of coach would you like me to be for you?"
- "What are your expectations for the coaching process?"
- "What do you need most from me during our coaching journey?"
- "What is the one thing I should not do or say to you?"
- "What excites you most about working with a coach?"
- "What concerns or fears do you have about coaching?"
- "What is the biggest change you are ready to make today?"
- "What is one thing you will commit to doing immediately after our session today?"

## Coaching Self-Assessment Form

Use this self-assessment to reflect on your coaching practice, identify areas for growth, and strengthen your relationships with those you coach.

### Current Coaching Relationships

1. Whom am I coaching now?
2. How did I establish credibility in these relationships?
3. What initially motivates people to seek my counsel?
4. What keeps them engaged and returning for support?



5. How long do my coaching relationships typically last?

## Reflection on Authority and Expertise

6. Have I ever misused or abused my authority as a coach?
  - If yes, how can I learn and grow from this experience?
7. How can I continuously enhance my coaching expertise and skills?
8. How do I intentionally build trust and rapport with those I coach?
9. What steps can I take to deepen my spiritual authority and alignment?

## Personal Growth and Confidence

10. What are the first three steps I can take to increase my confidence as a coach?
11. Who can support and mentor me in my coaching journey?

## Balancing Grace and Truth

12. Do I naturally lean more toward being a grace-giver or a truth-teller?
13. How can I practice truth-telling effectively in my current coaching relationships?
14. How can I demonstrate grace in my interactions with those I coach?

## Sample Assignments for Clients

Explore ways to help clients accelerate learning and transformation by using purposeful assignments. Below is a sampling of suggestions you might invite clients to consider:

### 1 | Assign Reflective Questions

- Ask clients to list how they think things are going in their life, ministry, or team.
- Ask clients what prevents them from being their best selves with their family, colleagues, etc.
- Ask clients to reflect on how passionate they are about the causes they're investing in.
- Ask clients what actions they would need to take to achieve different results than they are currently getting.
- Ask clients to identify at least four new approaches or actions beyond what they've already considered.

### 2 | Encourage Observations

- Invite clients to reflect on the pace and progress of their transformation. List what has changed.
- Ask clients to identify factors that have helped or hindered their progress so far.
- Invite clients to observe and list who speaks up and who remains silent during team meetings.
- Ask clients to identify who needs their support and who needs gentle nudging.
- Encourage clients to classify team members as dreamers, doers, or delegators.

### 3 | Recommend Reading & Learning Resources

- Suggest clients explore resources about the process of change.
- Encourage clients to learn more about themselves (e.g., Enneagram, StrengthsFinder, DISC, etc.).
- Recommend readings on topics they wish to influence or lead in.
- Suggest exploring resources on discernment, spiritual practices, or theological perspectives.

### 4 | Conduct Research and Analysis

- Encourage clients to learn more about their organization or faith community.
- Ask clients to research the demographics of their local community.
- Suggest exploring societal or religiosity trends that impact their work.
- Encourage clients to investigate what similar organizations are doing regarding key issues.

### 5 | Conduct Interviews

- Ask clients to interview five individuals with three questions related to their initiative.
- Suggest clients ask three people how they handled or would handle a specific situation.
- Encourage clients to interview three individuals to explore how they might contribute to a project.
- Recommend clients ask community members about their views on the church or local needs.

### 6 | Journal and Share Insights

- Encourage clients to journal about their patterns of success and what they do well.
- Suggest journaling about what they could let go of to focus on the most important priorities.
- Invite clients to describe their ideal day, week, meeting, vacation, or staff member.
- Encourage clients to list what they want to change in their life or ministry within 30 days, 90 days, or one year.
- Suggest clients reflect on what they will no longer tolerate in life and the cost of those tolerances.
- Invite clients to identify what they are willing to give up to achieve their true goals.

### 7 | Prepare for the Next Coaching Session

- Encourage clients to list what they want to take away from the next coaching session.
- Ask clients to identify what they're learning about themselves and their environment.
- Suggest clients outline what they plan to accomplish within the next 30 days related to their goals.
- Invite clients to describe in greater detail their desired outcomes or preferred future.

By integrating these assignments into the coaching process, you can inspire deeper reflection, actionable insights, and meaningful progress.



# Surface to Soul Coaching School

web: [surfacetosoul.org/about-coaching-school](http://surfacetosoul.org/about-coaching-school)

email: [jimladoux@surfacetosoul.org](mailto:jimladoux@surfacetosoul.org)

[drfelix@discoverwonderment.com](mailto:drfelix@discoverwonderment.com)