



Sacred Depths Certification

Strategizing

Joanna: Okay, it's good to see everybody. We are in our third of four sessions on visioning and strategizing. I'm really excited to dive in to everything that we're going to be looking at today.

We've already had two calls in this module. Our first call, we really started to dive into what is visioning, what does it mean to vision? What are the foundational principles? I don't know if this is the best way to say it, but "needed" or "required" for visioning. And we did some really good work around looking at visioning. Our call last week, we continued that conversation. We looked at different techniques we can use or things to consider when we're supporting our clients to vision. And then at the end of our call last week, we started to move into... Okay, so it's one thing to vision, but it's another thing to actually execute a vision. And we started to look at what I call the energetics of new things.

A vision, in one way or another, is a new thing. It's either a completely new thing or it's a variation on something that was done before, but in a new way. And so understanding a little bit more about the energetics of new things, who for us as practitioners can really help us support our clients to move into new things.

So today we're going to continue to look at that and then also move into strategizing. So once a vision is created and a client is ready to move into a new thing, how do we support them in creating a strategy to achieve it?

As we looked at last week, new things have a particular kind of energy to them. If we use the seasonal metaphor, something new is spring-like, if you will, versus something summer-like or autumn-like or winter-like. And we looked a bit at this idea that spring time is about excitement, versus the persistent and consistent of the summer. When we're supporting our clients to step into something new, how being in some of that spring energy, that excitement

energy, "This is new!" The curiosity, the, "Ooh!" All of that is going to be helpful for them to be able to step in.

That being said, and I'll take a step back. If you remember last week, we looked at something new is also, we can think of the difference, not to mix metaphors, but the burst that the mother needs to get the baby out. That's the spring time, new project energy versus the day in and the day out of raising the children, which takes a different kind of endurance. So when our clients start something new, we want them to have some of that push out energy to be able to start it with.

It sounds all fine and good, except of course, many times we don't feel this way about a new project. We don't have that excitement, energy about a new project. And so let's take a look at some of the things that we might want to be aware of as practitioners that can stand in our client's ways and in our own ways of being excited and ready, having that spring energy to start executing the vision that we have, the vision that we created. There are a couple of things that can be in the way.

The first thing is, I don't know at all yet. I don't know how this is going to turn out. I don't know how to do this, I don't know what it's going to be. I don't really know what the vision is completely. I have some ideas, but I can't see all the pieces. And since I don't know it all, I can't move forward. That's one thing that can be in the way. Since I don't know at all, I can't move forward.

Take a moment and consider that for yourself. Have you ever been in a place where it's felt hard to take action on something, to move into something new? Because a lot of it was in the mystery. You just didn't know. Elijah is saying, "Every day." I know. It takes courage to wake up every morning and not know what the day is going to bring, right? And step in. So, yeah. Good. I'm seeing some of you are, you've been there.

So here a way that I find helpful to think about this obstacle. This, "I don't know it all yet, so I'm having resistance to stepping in." Or, "It's hard to step in." Or, "I'm scared to step in." Back to the seasons. We said new things happen in the spring. Think about the very early spring, not late spring, but very early spring. Very early spring is still wintry, if you will. Very early spring, there's still as much dark as there is light, until we hit the spring. The spring Equinox is exactly as many dark hours, as is many light hours. That beginning of spring, we can see things, but not clearly yet. We don't have that full light that we do in the summer.

In the spring, we plant seeds into the ground, but those seeds are in the darkness. They're down in the deep, dark soil. They don't have all the sunlight yet. And again, I won't try, not to mix metaphors too much, but if we look at that birth

metaphor, when babies are first born, they're partially blind. They certainly don't have all of their faculties and resources yet in the very beginning.

So in other words, if we look to nature, we always begin in the mystery. That is how we begin. We begin in the mystery and the mystery is exciting, but it can also be for some people very scary. For some people, it can be exciting, this limitless, not seeing what's possible, but knowing that anything can be created. And for some people, that can be scary. And for some people, it can be both exciting and scary at the same time.

We can't totally see in the beginning, we don't completely know. Maybe not ever, but for sure not in the beginning. We may not trust that clarity is going to come, we may not trust that it's going to work.

So, take a moment and think about a situation where you started something and it really felt like it was still in the dark or in the mystery. A relationship, a work project, a habit, a new home, any new thing. Think of a time when you started something and it was really still partially in the dark or in the mystery, and how that felt.

All right. Let's take this. I'll give you guys another moment. Make sure that you're seeing your new home, new group coaching program. Hell, all. Right now, yeah.

All right, so let's take this a step further. I'm going to give you a writing prompt and the exercise is just write. I'll ask you to write down the prompt and then complete the sentence and then just keep on writing for about two minutes. And just see what wants to come through. Don't edit, don't think too much about grammar or sounding smart. Just really see what wants to come through from this writing prompt. And the prompt is, "Starting in the dark feels like..." And I'll put that in the chat as well. Starting in the dark feels like... I'll give you about two minutes.

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Joanna: That doesn't have to be negative or positive. In terms of how we relate to it. Just tossing that to chew on because there might be something there for you. And then just a reminder to everybody to speak to what you and what Lisa was just saying. The very beginning of spring is in the dark, but by the time we're done with spring, there's a lot of light. So we want to also make transition from the dark into the more of that clarity. Good. Okay. We often need to start in the mystery. And as we've seen from some of you that can be an incredible place to start. Dreaming happens in the dark. When everything is full clarity, it takes up a

lot of space. It can be harder to dream, but dreaming at night when there are no boundaries, when anything is possible, that's something else.

Sometimes it's also good to be in the dark a bit when we start something, because we don't see how hard it is and all of the things that it's going to take. Like if I knew when I got pregnant, all that it was going to take to raise a child. I don't know that I would have jumped in the way that I jumped in. Same with my business. So, how can we support clients that might be having resistance to something new because of whether they realize it or not, not knowing at all yet, or fear of dark? What are ways that we could support our clients if they've got a fear of not knowing at all yet and they've got resistance to starting something new because of that?

Joanna: It is so normal to have resistance to starting something because you don't know it all yet. And it is normal to start in the dark. We can't know everything in the beginning. We're not supposed to. So really creating awareness and normalizing around it can go so far. Beautiful. Good. Who else? What else can we do to support clients that might be in this position? What might we ask them? Think about questions. Anyone have any thoughts?

What's a good question you can ask the client who is in this position? Mm-hmm (affirmative) Heather's saying in the chat reminds of the energetics of the container, bringing awareness to the fact that they know best, that they have tools, yes asking questions about tools and that there is no wrong answer. That's because asking... Let's see, have you ever started something you didn't know the steps yet and it was amazing? It's a great question. Or when was a time, if you want to make it less of a yes or no, you could open that up. When was a time, what feels scary? So looking at the fears. Naomi saying, create space for them to be in that place rather than pushing them to move past it, no matter how hard it is. Yes. For some clients, that's going to be really important.

Sonya saying maybe a reality check, what's the worst that could happen? And then looking at how bad that really is. Nice. Bruce is asking when was a similar time and what helped you move forward? And what also held you back? Yes. LV saying, what if the growth in clarity comes with the not knowing?

Beautiful. These are great questions. A couple of others to think about. And I think Heather hinted at this as well is to see what resources they do have. You may not know everything, but what do you know? Or a question like how might it be a gift that you don't know it all yet? All right.

Another obstacle that can often stand in the way of moving forward on a new thing is this. It hasn't worked before, so it's not going to work this time. I feel like that was even brought up already on last week. Somebody brought that into the

conversation. Has it worked before? Marketing hasn't worked before. Whatever it is the relationship hasn't worked before. The trying to meditate hasn't worked before, whatever it is. It hasn't worked before. So it's not going to work now. And oftentimes when a client will say this, they won't say the second part of the sentence. They'll just say, well, it didn't work before. But really that whole sentence is it didn't work before and so I firmly believe, or I'm worried that it is not going to work now. I just point that out because sometimes even just helping clients complete that sentence can create a lot of awareness around where their thinking is.

So has that ever happened for you? Take a moment and think about that. Wanting to start something new. You've tried it before or a variation on it before and it hadn't worked. And then how did that feel to start it again? Maybe it was exciting for you, for the challenge or maybe it was like, ugh it didn't work. I'm not going to work again. Yeah. And it goes writing once bitten, twice shy. And then think about this. If you're working with clients, you can think about this with clients. If not, you can think about it really with anybody that you know. How has that showed up for clients? Didn't work before, it's not going to work now. What have you observed when it's shown up for someone else?

Joanna: Because we're in maybe spring, but the cycle doesn't just go around like this, it kind of gets hot. So we're in a different evolution of the cycle and we are in a different place than the last time we tried it. So what is different? What have you learned since the last time? What resources do you have that either you didn't have last time or you weren't aware of or didn't know to make use of last time? Any types of inquiries and questions around that can really be supportive for a client.

I would say, if any of these questions that are coming up appeal to you, I would answer those for yourself. Anyone else? How else would you support a client that was in this place? Another thing that you can do is reconnect your client back to their deep why. Why do they want this vision? Why is it important for them?

What about it is exciting for them? How does it fulfill their values, whatever it is? What is really connect them back to their deep why. I know for myself even not when something is new, but even when something is long term, when it feels hard, reconnecting back to the why is so vital for me. Whether it's my business, a launch that isn't going well but I know I need to keep on going. Sometimes my marriage, sometimes I have to reconnect back to why I decided to have kids. Whatever it is. But coming back to that real heart place can really be helpful and

generate that excitement. Also normalizing. There's some normalizing to be done on this one too. Normalizing that sometimes things don't work out the first.

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Joanna: Normalizing that sometimes things don't work out the first time. Whether it's work or relationship, or home, or starting a new habit, whatever it is, that that's actually a very normal part of the human condition. Back to patriarchal messaging where it looks like everything always gets done on the first try if you're on your A-game, right? But that's actually not real life.

I think a big piece of my work, or a portion of my work, is helping my clients remember or understand, even, for the first time, what real life is like versus what life looks like in advertisements and media. Some things do not work out the first time, end of story. But that doesn't mean that they're not going to work out the next time.

All right. Anything else on this one? Didn't work before. Let's see. Oh, I haven't read that book, Jennifer, Immunity to Change. I'm going to check that out. "What is it about your current identity that you're worried about losing?" Yeah, what's at risk for you. Beautiful.

Joanna: Sometimes, especially if something hasn't worked before, we can create so many stories about our future success, our value, all the things if it doesn't work out. And sometimes supporting the client, it's a thing and if it works, great. All is well, no matter what. I love that. Thanks for bringing that in.

Elvie is asking, "Would you bring up examples of people who have tried a few times and then succeeded?" 100%. Elvie, so this is back, remember in our Creating Awareness module, we looked at, sometimes personal story or stories of others is a great way of creating awareness. So 100%, I would bring up the story of when I failed myself, because I have many of those. But yes, a famous people. I think there was, do you guys remember like 10 years ago, there was this video revolving about Lucille Ball and Albert Einstein and Thomas Edison, all famous people who had failed and failed and failed and failed until they didn't. Again, it was really inspiring. I wish I still had the clip, but anyway, probably if you Google it, it's out there and it's a great little video.

All right. Okay, last obstacle to new things that I want to look at for today. And then we'll move into some strategizing. Expectation of things being shiny and moving quickly with no bumps in the road.

And then you start something and then as soon as you start it, there is a bump in the road and it's like, "Ugh, this wasn't meant to be." Or, "Ugh, this is going to be

a failure." "Ugh, I can't," because it wasn't just all shiny and quick and totally smooth. Now that's different than maybe what Stephanie was talking before, where it's a lot of struggle, and a lot of struggle, and no flow. But again, I go back to just messaging from culture. Things don't always happen. There are bumps, easy, right? There are bumps in the road.

What I've found is that for a lot of us, for a lot of people, especially if there hasn't been a ton of hardship in their... Well, I don't want to make generalizations. That's not fair. I don't know, call me out on this, and this is going to be another one of those things I'm going to say and you can take it or leave it or make your own thing out of it.

But sometimes, if you haven't had hardship before, and then something is hard, the first bump in the road or two bumps in the road, and then it feels too hard. And you feel like you can't and you maybe just want to give up. Let me know, you can just raise your hand in the chat if any of this is sounding familiar for you or clients or people you know. It's like, some difficulty comes up and then the energy just goes away. There's no energy for it anymore.

Joanna: All right, the last thing for now that I wanted to just share about new things and this energy of stepping into new things is one tool that can sometimes be helpful depending on the situation is supporting your client to step into the energy, into that springtime energy. Supporting your client, and sometimes what that can look like, it can look like a lot of different ways, but one way for clients that are open to it, is to connect into the highest, healthiest version of their younger self. Ourselves in that spring time of our lives. Our young ones, of course a lot happens in history to not always make this so, but in their highest selves, our young ones are curious, are experimental. They're not attached to outcome because the ego isn't there yet to be, "I have to succeed because I have to look good." Or, "It means this or that." Right? They're just willing and open to... I see it with my younger daughter, she's just on the cusp now of seven and it makes me so sad where you have some of that is starting to go away. But up until now, "I'll do anything. And if I try, it's great. And if it doesn't work, it's fine." And we're going. That young one that has that energy, that laughs at their mistakes, that's not obsessed with perfection or success, that sees it all as a big adventure and fun.

Of course, this is the ideal young one. And for many people, this one has gotten buried under history, but that energy still lies inside of us. So sometimes it's also helpful to take a look at how can you access that one inside of you? Where is that energy inside of you?

Joanna: We're going to step into strategizing. We may not get fully through it, but I'll make sure that you get everything that you need on it.

So we've got visioning and then all of the stuff, the fears of the new things can happen even before the visioning, it can block the visioning or it can happen as you're visioning, in the middle of the process. Or they can also happen once you've visioned, and then after you vision, you're going to want to start strategizing, talking about next steps to take. It can happen during the strategizing part or when the steps are actually ready to be taken. So it will be different. Sometimes the fears won't come up at all and then you've got lucky and so did your client.

But anyway, at some point after visioning, probably there's going to be some kind of strategizing. So, creating a plan. Now that we have this vision, how are you going to get there? How is it going to be-

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Joanna: How are you going to get there? How is it going to be created? What's the pathway? I think that a lot of times, not always but a lot of times, part of our jobs as coaches, as practitioners, are supporting our clients to develop efficient, supportive, and enjoyable strategies to achieve their goals.

So when we strategize with our clients, it can really run the gamut of pure coaching to coaching and consulting. When we strategize with our clients, it can run the gamut from pure coaching to a combo of coaching and consulting. So what I mean by that is, sometimes, it's really just going to be about holding the space and asking the questions for the client to come up with their own steps and make their own decisions about, "I'm going to do this. I have a creative idea for this. I did this in the past and it worked, and I'm going to do this," right? Coaching. But other times, particularly if we have an expertise in something, like this happens for me, a client comes, they want support in marketing something or whatever it is, usually, in the strategy part, I'm holding a combo, always what is best for them, full agency for the client, supporting them to brainstorm, see what they want, all of that, but I'm also bringing my expertise in on what... some suggestions that I have.

I mention this because, sometimes, back to what we were looking at, the difference between coaching and consulting, sometimes practitioners can just go into pure consulting mode when it comes to strategizing, and that's not fully supportive for our clients. I don't think I have to say more on that. Let me know if I do. Yeah, you guys got it. Okay. Okay.

So let's talk about the elements of a good strategy. What are the elements of a good strategy? So I'm going to share some pieces, and you'll get handouts on all of this, I'm going to share some pieces... And as a reminder, always coach the what based on the who. You're not going to always need these pieces, right? It's an art not a science, all the things, right? But these are some of the things that I have really seen are elements that really support creating a good, effective strategy.

So number one, obviously, a clear goal. I shouldn't say obviously. So, sometimes, what you'll vision with your client is the goal that you're going to be working towards, like a new program that they want to launch and fill, a new team that they want to create, a new job in their career that they want for themselves, a new romantic relationship that they want. So, sometimes, the vision is going to be the goal. But other times, if you'll have gone out a little bit farther in your visioning, "This is the business that I want to create," you'll want to, first, hit then from there, "Okay, so then what's the first clear goal?" Maybe the first clear goal is three clients, or could be something else, right? But having a clear goal. The difference between the vision of becoming a yoga master versus the first goal of mastering a headstand. It's too overwhelming to just create a strategy for becoming a yoga master, right? But less overwhelming to create a strategy for that headstand.

Sometimes, a lot of times, another element that you're going to want in there is a due date for the goal, or an accomplishment date for the goal. By when is this going to happen? Now, sometimes, that is not good for a client, right? Always coach the what based on the who. It will create too much pressure or whatever it is, but a lot of the time, having a date, a ballpark date, a month, so a due date, Catherine, that's a good piece to work in there. By when do you want to master your headstand? When you have the date, it can also help you understand a bit more about the flow of the action steps that are going to be taken.

Another piece that I have found to be really helpful when creating a strategy is getting clear on either a guiding feeling or a belief. So, for example, as I learn how to do this handstand, as I learn how to master the handstand, I want to keep on coming back to the feeling of curiosity. Or I want to keep on coming back... I want to do this with a sense of courage. Or as I do this, I want to believe that my core is strong enough to support the headstand. Or the belief I want to come to is if I fall, it's okay. I'll get back up again, right?

So having a little bit of a guiding light, if you will, by way of a feeling or a belief. So often, we jump into tasks with only the task in mind but not the journey in mind, right? And what is that quote? I don't know, the journey is as important as the end result? I don't know, whatever it is. But right? We're spending time

getting to that result. It matters by way of quality of that time, but also, if we're intentional about how we want the quality of that time to be, they probably will help us get to the result in easier ways or better ways. That make sense? Yeah, okay.

Baby steps. My Virgo nature is to break everything down into small, tiny, doable, easy components. So when I was a student, when I was in high school and college and in grad school, I was literally... And you don't have to get as crazy on this as me, by the way, but I'm just showing you the most extreme. You can see for yourself or where your clients want to fit into this. If I had a test in college, first three chapters of the book test, and I knew the test was in four weeks, I would literally get clear. So the first week, I'm going to be studying part one of chapter one, part two of chapter two, and part one of... whatever it was. Literally, what are the smallest baby steps so that this feels doable for me, so that I can go at this at a pace that feels right. And I do that to this day.

If I have a big project, a small project, whatever it is, for example launching a new program, I will get down to the granular. Not so much that it's overwhelming, whatever the next step is. Maybe I'm going to do a preview call for that program. And I will list out the 10 things that need to happen for that preview call, and I will even list out the days that I'm going to do those 10 things. Now, again, for some people, that might be crazy-making, anxiety-making, I will just throw that out there as a thought. I like to call it blueprinting. And I'll share more on exactly how I blueprint. I'll make a little bit of a Facebook Live on that, but for now think about, "What are the small baby steps or the smaller steps?"

And then the other elements... Well, so the other element is markers or celebration moments built in. You can either build that into the strategy in the beginning or as you're going, but really knowing, "When I accomplish this, how am I going to celebrate? What am I going to do?" Right? Or, "Take myself out to lunch if I can get this done." It doesn't have to be for every little step, right? But building in some celebrations there, for some clients, can be really motivating.

Joanna: But one thing... and I'll go through all the pieces of blueprinting.

A couple of pieces. So one is, sometimes, blueprinting isn't for everyone. What I've found with clients is some of them love it right away, some of them hate it and then eventually come round to it anyway, and then it revolutionizes their lives. When I was younger, I was in the museum world, my career, and I remember the very first exhibition that I was responsible for, I had to create a budget. And I created this budget and every... what everything was and how much it should cost to a T, and I remember sharing it with my supervisor and my

supervisor said, "You got all the items, this is great, but I want you to add 15% to each of these costs." And she said, "You always need contingency."

And that was one of the smartest things that this particular woman ever said to me. And I think same with time. So I even do this for myself. If I'm doing something and I guess that it should take me 45 minutes, say to write a draft of an article, a newsletter article, I'll put in contingency time. I will give myself more like an hour or an hour and 15, sometimes even more, or I'll give myself two sittings instead of one for each of the action steps or some of them and not... And same with clients who are not... I am Virgo, but even ones who are not. And so that's, I think, something that could be really helpful.

The other thing is to maybe not blueprint all of it out, to maybe just blueprint a week or a couple of days at a time. And there might be something about the smaller, the real smaller blueprint goals, that will help you check them off in a different way.

Joanna: What you're talking about, I'm sure at least half of the people here are nodding their heads in understanding. Most things do take longer than we think they will. Most of us are behind. I mean, I can tell you 100 things I'm behind on. So, first, just really normalizing it. We're not robots, we're human beings. We each have our own pieces. That's one thing. Speaking of pieces, part of what I'll share for the rest of this strategizing, for us to look at, is we each have our own natural pieces and I've identified a couple of different ones. And so when we can really get to know what our piecing is, that can help with all of this. So that's another piece.

Having compassion for yourself and kindness for yourself, another big piece. And then looking... really asking yourself or if you're working with a client, what is the type of environment that you need? And by environment, I really mean anything. What is it that you need in order to not feel so overwhelmed? What is it that you need, or what is it that you need to know? And identifying those and then seeing how many of those things you can put into place.

Joanna: All right. All right. Everybody, thank you for today. Sorry that there's going to be a little bit extra for you to listen to, but I'll get that to you over this next week. I think you'll love it. Let me know what you need over the next week, and I'll see you soon. Bye.

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