



Sacred Depths Certification

Next Steps Strategies & Ritual as a Coaching Tool

Joanna: Okay. So it's our last class. I can't believe it.

I'm so sad that we're at this point, that this is our last class, but I'm also so thankful that we've gotten to this point and so grateful for all that we've experienced together. So we're going to have a big class today. We're going to end with a bang.

So it's going to be a big class today. We're looking at a lot. We're going to be looking at ritual as a coaching and transformational tool. I know I always say one of my favorites, but it is one of my favorites. And we're going to also go into two kind of... You'll see, we're going to kind of fit it all together. We're going to look at assessments and next step processes in particular and how to support one-on-one clients who are coming to the end of a cycle, what to do and how to have a conversation if they're aligned and you want to invite them to continue to work with you. And how to end a cycle with clients as well, right? Apt for our time together today, all of it. And then I've got just a little something for all of you at the very end.

Before we dive in to all of that, a couple of pieces.

You have your member center and all of the recordings and the worksheets for life, or as I like to say, for as long as I'm in business, which hopefully will be for a very long time. So it's not like we're done and you don't have access to all the material that we've looked at so far. It's there for you for whenever you want to go back to it.

Certification, I know I reviewed a month or two back, but let me review again and just see if there are any questions on that. So I know that life is busy and some

people are going to like wrap up and finish certification within the next few weeks. But honestly, most of you, it's going to take a little bit of time before you get your materials together, and you have plenty of time. I forget... I should have come to this call knowing the date.

I'm just going to be totally honest with you. We have a suggested date that is easiest for my team because I'm not the one that reviews all of the certification materials. It's like two or three months out from now. I will post it in the Facebook group. I can't remember. So we do have a due date because that's easiest for my team, but don't stress out if you need a little extra time than that. I know that there's so much happening in the world and in our lives and all of that. If you need a little bit extra time, submit when you can, we will always review. We are always happy to certify another practitioner.

For certification, what you'll need is, obviously, you have a checklist in your member center that you've listened to all of our sessions, that you've done all of the homework from the sessions and gone over all of the materials. That is honor system. You guys are actually lucking out because we've changed our certification requirements and there's a lot more moving forward and tests and all of that, but I'm not going to make you do all of that since that's not what you signed up for when you started the program. I told you what it was. So, it's on the honor system that you've gone through all of the material and you've done all the homework, and you want to fill that out.

The next requirement are your coaching partner hours. And that's one of the reasons why I want to keep... There's a few reasons why I'm keeping the Facebook group open until next Friday. If you still need coaching partner hours, post in the group, I know there will be people that will meet you there that are also looking for more practice sessions. So if you know that you need more, make the connections that you need to make so that you can get those done. You need 18 sessions. You need another 18 on top of that, another 18 sessions with clients or volunteer clients, right? So to have completed those.

And then the other piece is to submit a recording. All of the instructions on how to do that and how long, all of that's in your member center. What I just want to highlight right now is a couple of things about it. So you'll submit a recording and what we're really looking for in the recording... I am not the person that listens to it myself. [Inbal], on the team, listens to all of the recordings, and she is looking for very particular things. Like, what it takes to pass is very particular things. So she's looking at energetics and container. Did you set the container? Did you

open and close the container? Did you hold a tight container? What is the energy? Everything we learned about in terms of energetics. She's looking for listening skills, she's looking for creating awareness skills. And each one of these get weighted. She's looking for questioning skills, and then she's looking for visioning and strategizing skills.

We can't look for befriend your fear skills or wheel of self-sabotage skills or rewiring, because that may not necessarily come up, right? Those things aren't going to come up in every session. So it's great if you can pull one of those things out, from everything that we learned, and when you do, we'll be looking at it through the lens of those foundational skills that I mentioned in terms of passing for certification. So you don't need to be... Anyway, there's no such thing as perfection. I think it's weighted on a scale of one to five. You don't need to get a five on all of them. You just need a certain score overall.

The other thing I want to say about it is this. Sometimes people, I don't even want to use the word pass. I don't know what the better word for it, but just for the sake of the conversation. Sometimes people do not pass on the first recording. If that happens, a couple of things. Number one, no shame or judgment. Number two, you will pass on your second pass. I can almost guarantee. We'll give you very specifics, like, "Work on this part of your questioning," or, "There wasn't any strategizing," or whatever it is. But I'm just bringing it up to say, if that does happen, you are in good company. You can resubmit again as soon as you would like, and we'll really give you the instructions so that you know the little tweaks to make to pass on the next pass.

Joanna: Okay. Ritual. So I am so excited for us to be looking at ritual today. At this point, we're really off kind of the beaten path of traditional coaching, but this is something that is so embedded... I don't know how to say it. It's just so embedded in everything we've looked at so far in Sacred Depths, and this is not going to be exhaustive because, like some of you might know, I teach a whole program just on ritual and experiential work and all of that. I haven't offered it in a while because of COVID, but there's so much... And I know some of you are ritualists, there's so much to look at when it comes to ritual. So we're certainly not going to be exhaustive, but we will toe dip into it today.

As far as I'm concerned, ritual is one of the most powerful... It's just one of the most powerful coaching and healing and facilitation tools that you can have for your clients and for yourself. And one of the reasons why ritual is so powerful is because it really allows you to tap into... Back to the theme that we've been

talking about throughout Sacred Depths, ritual in one fell swoop allows you to tap into the mental level of learning and processing, the emotional level of learning and processing, the spirit level of learning and processing, and the body level of learning and processing.

Joanna: So whether you're using ritual or not, we want to just always be thinking about these four levels of learning and processing and how are we using them in our work with clients. Aside from ritual, one of the other things that activates all four levels is the befriend your fear process. So it's yet another reason to love the BYF process. It, in this very simple way, really activates those four levels.

So we're not going to talk about ritual today in terms of group facilitation, again, because that's a whole other ballpark, although there are crossovers. We're really going to talk about it in terms of one-on-one work. And ritual can be utilized in one-on-one work, similar to what we were talking about journaling last week, either in session itself, or as homework. You can just do a ritual with a client in session together, or it's something that you can give them solo work to do on their own, based on what comes through in a session.

So let's even kind of take it back for a moment. So what is ritual? I mean, like what is ritual? Because that word is starting to become more popular and thrown around. So I'm going to give my definition of it for the purpose of our time together today. A ritual is taking an action in order to make the intangible tangible. Ritual is when we take an action in order to make what is intangible... And what I mean by that is thoughts, feelings, desires, fears, impulses, right? Anything that is intangible inside of us, to make that tangible. Because this is body, right? And so part of this is the body level. When we do that, when we make the intangible tangible, we can see it differently. We can process it in a different way and we can work it through in our bodies.

I really like to think of ritual also as play. One of my first teachers, mentors, Susan Mary [Hellerer], she always used to refer to ritual as sacred play. And what that means is, similar to young children that play, they play themselves into being. They play house. They play doctor. They play librarian. They play going shopping, right? Whatever it is. They're playing themselves into being. They're enacting it. This is what ritual can do.

When we do this, when we do rituals, it's a signaling to the psyche. It's a signaling to the psyche, right? So when we want to release something in ritual, it's a signaling to the psyche that we're ready to release it, as an example.

Joanna: Psyche that we're ready to release it as an example. Another important purpose of ritual is that it's an opportunity to create sacred space, which is so needed, especially in our lives today. When we do ritual, even if it's a short little five, six, seven minute ritual, it's sacred time out of regular time. There's a container around it. It's a place that's just for our soul to have space. Another definition or purpose of ritual is that ritual is an opportunity to mark an important moment or work through a transition.

It's an opportunity to mark an important moment and work through a transition. I'll just share briefly. For me, ritual has played a really big part of my life over the last number of decades. I came to it in this way. I was back in my New York days. I was living in New York. I was still living in New York city, not even in Brooklyn yet at that point. I was leafing through a brochure from the open center, which some of you may have heard of. I came across this just short little blurb, this district description of a six week class that was called Woman Ritual.

I don't remember what the description said anymore, but I remember so viscerally reading this description of how women have been the keepers of ritual for millennia and when I finished reading through those few sentences, having this recognition inside of myself, that when I was a little girl, I understood that the world was magic and that I was part of that magic and that I had lost that along the way. I just share that with you to say, whether you believe in magic or not, the act of ritual can support you, can support your clients to feel that connectedness to, and this is that spirit level, to the bigger things of life, that somehow when we're just so busy in our everyday lives we forget about.

Since that class many, many years ago, ritual has taken on a really big part of my life. I've integrated it just into how I follow the seasons and the cycle of the moon. For a long time, I was a celebrant. I officiated weddings and births and deaths in my own life. When I got married, I really didn't just go with the rituals you're supposed to go with. But John and I created a ceremony that was really representative of us and our union.

I could give so many examples but I'll just give one other. It's also been an anchor in my life for really hard moments. Before I became pregnant with Nina, I had a miscarriage. For me, what helped me process that miscarriage was to do a ritual

around it. This may sound a little weird, but we all know each other well enough by now. And of course I was already a ritualist, so I knew to do this, but when I realized that I was miscarrying, I somehow thought to catch some of the blood during those moments. And of course there was a lot of grief and chaos and all of that, but I caught some of it and I saved it for a time when I was ready. And then when I was ready, weeks later, I took the train, for those of you that know Brooklyn, didn't have a car, I couldn't drive.

I took the train upstate to this mountain that I just really loved and I did a ritual. I honored the life that was lost. I grieved, of course, that wasn't the only moment that I grieved. And I buried the blood and I planted some seeds. It was just so important for me, again, to make intangible, tangible, and to mark that transition. That might seem a little bit out there, or some of you may love it, like yes, but either way, we actually in our just everyday mundane lives have rituals all the time. We blow out birthday candles and make a wish. We have graduation ceremonies. Why do we have graduation ceremonies? It's a ritual. We put on the hat and we moved the tassel from the one to the other. We walk down the thing and we get the diploma. It marks a transition. It marks an ending of one cycle and a beginning of another.

We make wishes and throw a penny into a fountain. Again, making the intangible, the wish, tangible, all right. You guys with me so far. Let me pause here. And just so you know where we're going, I'm going to just describe a couple of different types of ways to ritualize things that you can think about with clients. And then we'll do what we did last week with journaling, but I'll give some scenarios and ask you to create some rituals. And then we'll move on to, we still have a lot more after that. But let's pause here. I'd love to hear what you're hearing so far. What's coming together for you so far. What questions you have? Kathy is saying in the chat, I also see it as opening up and continuing conversation with the divine forces.

Joanna: There are so many different types or intentions for rituals. Again, we could go on and on and on. For today, I want to just name a couple of categories that I think are helpful to think about when it comes to ritual. One type of ritual or one portion of a ritual, again, making the intangible tangible is about releasing something that a client is ready to release. This can be releasing a belief that they've been operating under for a long time. And maybe on a mental level you've created awareness about this belief and looked at how it's impacted the client and other pieces more than that, you've done rewiring, whatever it is. And now they're really ready to release it. Release can be releasing a fear. Although of course we

know it's more about befriending the fear, but releasing the impact, maybe the real negative impact of fear may be having on someone.

It can be about releasing a relationship. It can be about releasing a pattern that's no longer serving the client. Can be about releasing a home. I did a releasing ritual when we moved from Brooklyn to North Carolina. When a client is ready to release something inner or outer, there may be opportunity to do a release ritual. Some of the most common we use to ritualize releasing something is thinking about the elements. We're always working with the elements with ritual. Fire, burning something. It could be writing a belief that's ready to be released down on a piece of paper and burning the piece of paper.

Again, thinking about the elements, earth. You can bury something that is ready to be released. Give it back to the earth. Maybe you have a stone that symbolizes a pattern that's ready to be released or whatever it is and bury it. Or something else, but you find an object and take some time to really infuse the object with this thing that is ready to be released. And then you can bury it. Ripping, ripping pieces of paper. I once did a really powerful ritual with a friend. She had this big knit blanket and we unthreaded the entire blanket. We just unraveled it. We were doing release work. Flushing down the toilet. Shaking it. Releasing, shaking it out of yourself. Other ways to release, but those are some to activate some of your creativity there. Another type of ritual or part of a ritual purposes about honoring.

Again, making the intangible tangible. If you have a client that is really ready to honor something about themselves or own something about themselves more deeply, you can ritualize that. You can make that tangible. For example, if a client is ready to own some of their brilliances more, and this can be so simple. With oil, they can take some oil and anoint different parts of their body and name this part of my body holds my intuition and this part of my body holds my sensitivity. Just really to own in those ways. Another example of an honoring or an owning ritual can be creating something to symbolize what wants to be honored or owned. Another purpose of ritual or type of ritual is setting intentions. Again, making the intangible tangible. You've been working with a client and they realize that they have an intention around something. There's something that they want to start. There's something that they want to do. Anything they intend, inner or outer. Intention rituals. Some nice intention rituals can be planting something. Taking seeds and having that symbolize the intention and planting those seeds.

Sometimes I've had rocks with markers that you can draw on rocks and you can have a word or a symbol for the intention and really infuse the rock with the intention. Candle carving, carving intentions into a candle and then lighting it. There's so much more but hopefully this is sparking some thoughts and ideas. And then another purpose of ritual is cleansing. A little bit different than releasing. Releasing is letting go. Cleansing is wanting to be cleansed of something. Can use water for cleansing. Putting hands and water, a shower, putting feet in water. Salt. Having salt, this could be for releasing to, having salt symbolize something that you want to cleanse or release and then letting it go into water.

Okay. That was a very quick whirlwind just to get ideas going on ritual and things that you can do. I think the best way for us to go deeper with the is to brainstorm on some scenarios. I've got some scenarios for you. Either for yourself or the practitioner, what's a ritual that you would create. First one, and I'll give you a couple of moments to jot down some notes. Let's say you've got a client who has a birthday coming up and it's a big birthday for them. Maybe it's a 30 or a 40 or a 50, or it's just they have a sense it's going to be a really big year.

What is something or a series of things that your client could do to ritualize the ending of one year or one decade and the beginning of another one. Take a moment and think on that. You might have little ideas here and there. I'll give you like two, three minutes. You might even have some ideas for an elaborate ritual. What might be a good for birthday ritual? If you have a birthday coming up or a client with a birthday, they've had a big year, they're moving into a big year. How can you help them mark the transition, make the intangible, tangible, create sacred space for themselves around this.

Joanna: Birthday rituals. This is what I do every year on my birthday. I do it on my birthday. This is my thing with myself every year, always with a good cup of tea or coffee. First I take time to really review and write out all the amazing things that happened in the year just passed to really honor, even if it's been crappy moments to really, really honor all that came through in the last year. All that I learned you, any beautiful moments I can remember, new relationships formed, celebrations, all of that.

And then I make the list of all the things from the last year that I don't want to bring into me to the new cycle. Anything I'm gripping onto, either that just doesn't need to come with me. What is it that I want to release? And then I make a list of all the things that I want to create in the coming year. The things that I

honor are really the things that I want to take with me into the next cycle. And then the things I don't want to take with me, and then what is it I want to create.

And then I ritualize each of those three things. Sometimes in terms of what I want to take with me, I might find a piece of jewelry that symbolizes all of those things and really infuse all those things into that piece of jewelry. And so I have that when I wear it. I might do one of the release rituals I mentioned earlier on the things that I don't want to bring with me. And then a setting intention on what I do want to bring. As an aside, when we get to assessments and next steps, you'll see that there's a correlation between that and then bringing clients into new cycles as well.

Kathy's saying I might have the person make a beautiful herbal flower cleansing bath. Yes. And then after emerging from that write intentions from the new era. I love that. Cleansing the year that has passed and then being open to the new intentions. Gloria's birthday is at the end of the year so it's a two in one. Let's think about this. What if you've got a client or for yourself, that is moving through a divorce. What are some rituals that would be really supportive? And of course, everybody moves through divorce differently with different issues and pieces. You can think of what some of that might be for particulars. What are some good divorce rituals? I'll give you a minute or two to think about that?

Think about what someone might be going through in a divorce. What is intangible that would be really supportive to make tangible. What it is that they might need to mark this transition and move through it for themselves. In so many ways this is about so much of what we've learned over the last 10 months too, in terms of understanding human behavior and human responses to things. Hey Katy, We're talking about ritual. We've looked at a lot of things and now we're just doing some brainstorming rituals and we're talking about divorce. What if you had a client or for yourself, that was moving through a divorce, how would you want to make some of those feelings and ideas that are intangible, tangible?

Joanna: Okay. All right. So let's continue. We're going to spend the rest of our time together. So I guess the second part is kind of related to the first part because one of the pieces around rituals a lot of rituals happen around times of transition. The end of one cycle and the beginning of another one. And we're coming to the end of a cycle and the beginning of another one, and that happens in client work, right. Our clients, hopefully, we're not doing just one-off sessions with some

clients, and our clients hire us for a cycle, a three-month cycle, a six-month cycle, a one-year cycle, whatever it is. And when we come to end of a cycle, we're going to look at this specifically for one-on-one clients, how we looked at the very beginning of Sacred Depths at the importance of setting a container of how we start off. How we end, is it just as important to the transformation, and everything is how we start. How we end is just as important as how we start.

And we want to have... I think it's important with our one-on-one clients to have a powerful way to end a cycle. When we have a powerful way to end the cycle of coaching, it allows our client to integrate even more deeply all that's happened through the cycle of coaching, right. Similar to when we looked at the container of one session, we want to start by setting intentions. We want to end with takeaways, right. That ending is really important to the integration of all that happened. But we want to have a process for this when we end a cycle, so it can support a client to really get more of what they need from all the work you've done together. When done well, it can support... if a client is ready and wants to continue working with you, having a way to end a cycle is really important in terms of beginning the next cycle, right.

And we've seen that even just in our conversation of ritual, right. Birthday, how we end a year and we begin a year, right. Divorce, we end a relationship. We start a life without holding on to that relationship. So endings and beginnings are very much connected to each other. And I'm going to share with you a process that I have found over the years to be a very powerful and effective process if you're coming to the end of a cycle with a client and you know that you would like to continue working with them, and you have a sense that there's an opening for them to want to continue with you as well. Now, sometimes, this is really important, and I want to make sure I mentioned this.

We're not meant to invite every single client to continue working with us, right. And that doesn't mean that the work together hasn't been amazing. It just means that there's not an alignment in that moment to continue working together, right. So we want to actually be very particular about who we're inviting into a next steps process versus who we're not. And even then, we do want to be very particular about how we end our cycle with them so that they can get all the celebration and the integration that they can at the end.

So you're going to get templates and a script, all of that. But I do want to just take us through the next steps process, just so that you understand it, we'll pick it apart a little bit. There are too many practitioners in the industry who constantly

have to look for new private clients all the time. Obviously, being a good practitioner is the top thing you need in order to have continuing clients. That's number one. That's what we've been focusing on for 10-months. But you also want to know how to make the transition so that you don't always have to look to replenish and to have new private clients in your stable or your roster of clients.

Okay. So all that being said, a couple of things before we get into the mechanics of the next steps call itself because there are a couple of different pieces that you want to take into consideration. But even before we get there, a couple of things to say. If you know that you don't want to continue with a client, you don't necessarily need to schedule a separate next steps or end call. You can do celebrations on the last call. But if you know that you do want to invite a client to continue with you, unless it's a client that you've just been with forever, and your rates are pretty much staying the same. And unless it's that situation, I do recommend scheduling a separate I like to call it next steps and celebrations call. You'll get a template, an email template of how to invite a client to do that.

I recommend scheduling that call between the penultimate and the last call of the cycle if it's possible scheduling-wise. So that most ideal is to have this call happen between the second to last and the last call, if not, between the third to last and second to last call. But I really liked to have it before the very last call because it can be a little anxiety-making for the client. And sometimes even the practitioner if you have your last call, but you haven't had the next steps process, if you don't know if you're continuing or not together. Like, "Is this the end or not?" Right. So it can really help create the closure of the cycle if you know before then if you're going to continue or not, or at least if you've been started the conversation.

So I recommend either verbally towards the end of a coaching cycle to invite a client into that special call or to do it via email. And again, I'll send an email template for that.

All right. So what happens on the call itself? Well, again, the call is really this kind of ending a new cycle and opening up the door, ending an old cycle and opening up the door to a new one. So I always like to start the next steps calls by setting an intention, right. And this is something that hopefully we're doing in all of our clients' sessions. So our clients are kind of used to this already at the beginning of a call setting an intention. I like to set it a little bit differently than a regular client session where you'd ask the client what's your intention for our time together today.

So on these calls, I'll start first, and I'll say, "Let's take a moment and set our intentions for the time together." Oh, let me just back up and say one thing. You'll see in the email template that I shared to schedule the call that it's very upfront what the call is about and that's really important, right. In terms of integrity and consent, we're setting up a special call so that we can really look at and celebrate all of the work that we've done together and then explore together if it makes sense for us to continue. You don't want to just say it's like a celebrations and wrap-up-call and then have this invitation to work together. It's icky, right. All of us already know that, but I just want to make sure I point that out, right.

[inaudible] because that's also going to come up in the intentions when you set intentions on the actual call together. So I oftentimes like to say, "Let's take a moment and set intentions, and I'll go first," and then I'll ask you your intention. And my intention is for our time together today is first and foremost for us to connect and to connect deeply, right. And that you can't... obviously don't say anything that you don't mean, right. So when I say that, I mean that. Part of my intention is to connect deeply with the client. And then I'll say something like, "And to really use this time to celebrate and honor how far you've come since we've began working together because it's really incredible all that's been created. And then, from there, my intention is to use this time to really look at where the places that you are ready to go next. Where is your evolution leading to you next? Where your next set of goals. And then as we do that, if it makes sense, we'll also, together, look at how I can help you with those goals moving forward."

And then I'll ask what the client's intentions are, right. So I'm all ready at the start of the session. We're understanding why we're here. We have a focused intention. Asking a client for their intentions, obviously, you want to do it so that they get to express, they're seen and heard, and it will give you information to go into the call with and the session with. From there, the next part of the next steps process is about celebrating. It's about celebrating. So similar... Remember I was sharing my birthday ritual when I'm moving from one year to the next. One of the first things that I want to do is honor everything that was just created, right, that honor the year. We want to do this in a next steps call for a number of different reasons. Number one, so that the client, by naming all of the celebrations, they can go deeper into integrating all of that they've created inner and outer. All of the shifts, all of the learnings, all of the forward movement. There's a space to really be seen and heard and mirrored in all of that.

Another reason why we want to do celebrations and next steps calls is, and we looked at this, back in strategizing because we know that we're going to be asking

them to look at what's next. We always want to move from strength to strength when we're visioning, right. We want to start a new vision from all the resource that's already there. When you open this up with a client, this celebration. So a couple of things. First of all, I should have said, I really like to put aside a full hour for this call, just to really, I know it's an hour of your time, but to really give it space because there's so much magic that can happen in this call. And so, out of that hour, I like to spend at least 10 to 15 minutes, I shouldn't say at least, 10 to 15 on celebrations.

A couple of things to know. And some of this is review from when we looked at celebrations and our client sessions. As human beings, we tend to under celebrate ourselves and not really see everything that we've accomplished. We tend not to see all of the ways that we've evolved, all of the things that we've learned, all of the ways that we're moving forward, right, because we can only... this is a fault of human beings. We can only see what we haven't achieved yet and what is still wrong, right. We know this. We've looked at this already in this program, and that is still sometimes going to happen when you get to the next steps call, right. And so you really want to use the time in space to support your client to celebrate themselves. It is such a gift, and it is such a service we can do for our clients. Period. End of story.

Now, sometimes a client will come to the end of a cycle, and they haven't moved as forward as much as they would have liked or as quickly as they would have liked, right. They're not in the place that they would have wanted to be by the time they came to the end of the three months, six months, whatever it is. When you open up the space for celebrating, it's important to acknowledge that, or else the client's mind is going to just be stuck on what didn't happen, right. Again, human nature. So if it's someone who you know is really feeling like this didn't happen, and that didn't happen.

You could say, "I know that there are more places that you want to go. I know that there are certain places that we didn't reach, and we're going to look at those places and really name them and assess them in a few minutes. But that being said, you've also accomplished so much or so much has happened. There's so much to celebrate. And if it's okay with I really want to make space for that first," right. Acknowledging and honoring what is. We want to honor what is, and we also want that space to celebrate. So... sorry, hold on a second.

So I like to then just ask the client, "Think back to when we started X months ago, whenever the beginning of the last cycle was, think about where you were. What's

shifted or changed for you? What is it that you want to celebrate? What on the inner or outer level has moved forward?" And sometimes I'll say to a client, "We won't have time to look at all the things, right, because that could take hours. But what are the things that feel really, really important?" And then your job is to really hold the space to validate to reflect, to affirm each of the things that your client says and celebrates.

So not just like, "Yes." Right. But really reflecting back and pulling like giving the space and the weight to each thing. I can almost guarantee that, again, because of human nature, there are going to be things that your client doesn't mention or doesn't see. And so your job is to also point those things out as well and to bring depth and [inaudible] to all of the ways that they have really shifted and changed and moved forward. Let me pause here. There's still a number of parts left to this next steps call. But let me just pause and ask if there are any questions so far on what we're looking at.

Joanna: Okay. So after celebrations, the next kind of phase of the next steps process is about vision. So now that we've looked at all the places. How far the client has come. They started here, and now they're here. Then we want to... the next part of the call is, so then where would you like to be? Where would you like to be in six months? Or where would you like to be in a year from now? And we want to hold space 10-minutes-ish for our client to really take a look at what is it, where do they want to be in a year from now? What is it that they want next? Based on where they are right now, right, because the work that we just did is like kind of helping them see, like where are they right now? What is it that they want next?

And similar to celebrating, what I have found sometimes is that a client is really wants, sometimes not always, but really wants and desires and is ready for more than they may share in their vision. So, again, sometimes a client can underestimate what they want next or what they're ready for next. So as I listen and they lay out. And I always tell clients to take notes during these calls, so they can really kind of see all of it in black and white. As I'm listening... for example, if I see a client kind of set a goal next that may seem smaller than I sense not only what they're ready for, but what they may desire. I may kind of bring that into the conversation and ask them about it. So it's very much a conversation. It's very collaborative as they're laying out their vision.

We want part of our job in this part of the call is to really listen, do hold space for the vision and really listen deeply to support the client to vision a vision that is

aligned for them and appropriate for them. What I love about this and the celebrating is that... sorry, I forgot to put my phone away before we started. What I love about this and the celebrating is that it's such a powerful and sweet opportunity for you as the practitioner to be able to show your client how you see them. Because when we're in that space of celebrating with a client and when we're in that space of visioning in this way.

And it's interesting because for those of you that have listened to the authentic enrollment conversation workshop. When you're enrolling a new client, there's a vision portion of that conversation too. I always love the part of the next steps even more because, at that point, your client... You've seen what they're made of. You've seen how they've grown and what they've struggled with, and what they've worked on. And you can really honor and celebrate them, not only in the celebrations but as you support them to create the vision. Hopefully, that makes sense.

Okay. So we've set intentions. We've held space for celebrating for the client to see where they started, where they are now. We've held space for them to begin to create a really aligned vision of where they want to be next. The next part of the call, we can call it the bridge. It's different than the bridge and the original enrollment conversation. It's similar and different. So this next part of the conversation, the bridge, is about supporting the client to see what they're going to need in order to get to their next place of vision.

Joanna: ... to get to their next place of vision, what they're going to need in order to create that vision.

This is important for a couple of reasons. Number one, because it's just helpful in terms of strategizing, right? To see what they're going to need in order to get to this next place. Number two, this is the part of the conversation where you can honor and acknowledge what didn't go well so far and retool some of that. The client can look at how they may want to handle those blocks differently moving forward. Of course, all of the things that they're going to need in order to create what they want, those are the things that you would work on together. So everything that comes out of this bridge part of the conversation is also like a setup of, "This is the roadmap for us to work on moving forward."

So the way I like to start this portion of the call is to say, "Okay, so now we just laid out this beautiful vision," and I'll let them know I think it's so attainable and so achievable. If during the visioning part, they named things that I'm not sure

about, we'll look a little bit deeper. I won't say, "You can't create that," but we'll kind of look, and again, you want to create something appropriate.

And so then at that point, I'll say, "To get to X," right? Whatever it is that they've just visioned, what do you know about yourself that you're going to need? What do you know about yourself that you're going to need? Where are the places that you know you're going to need support? That's a question I might ask. So I'm not asking all of these together, but I may choose from any one of these. So what are the places where you're going to need support? Or what are the things that you sense you're going to need help with so that you can make this vision happen for yourself? And then you'll really take that time to look at piece by piece, inner and outer. What is it that this client needs next in order to create the vision that they want? In order to achieve the vision? I should say.

Again, this is a place where it's so valuable for the client because you know them so well at this point, right? And so as the two of you look at these pieces together, there's a lot of wisdom that you'll be able to add, to toss for them. So, for example, they may not mention... I don't know, I'm trying to think of an example, like better boundaries, right? So, you know because of the work that you've done together, that maybe they haven't had the best boundaries around going to bed at night or using social media and technology. I don't know, I'm just making this up. And it could be a potential hindrance to what they want to create, or that has already been a hindrance to what they want to create. Right?

So, for example, in this part of the conversation, that's where I'd say, "I want to be honest. I really believe that in order for you to create X," whatever they want to create, "it's so vitally important for you to commit even more deeply to having boundaries around social media. I know that's a process. I know that we'll work on that together, but I know that in order for me to really help you with this, it's vital for you to have a deeper commitment to those boundaries. Is that something you're up for? Is that something you're up for working on together?" So you really want to bring everything that you know about the client and what can support them into this part of the conversation.

Okay. Let's pause here. What questions do you have? Or what are you seeing that's important? Anyone have any q's? Okay. All right.

So after that, really, you've worked together with your client in the session to do this beautiful assessment of the turning of the transition. What's been created so far, what wants to be created next? What is needed for that? The honoring of what didn't happen. All of that. And then when you get to that point in the call,

that's where you want to invite them in. If it still feels aligned after all of that, that's where you want to invite them to take the next steps with you. And so at that point, if I know I want to invite them in, I would share all of the pieces that we're talking about. "These are the exact pieces that we would work on together." Whatever, depending on how the conversation went, but essentially something like that.

And then at that point, there's one of two things that can happen. If your rates and the offering, like the amount of sessions and all of that, are staying the same, you can just tell them verbally, "I'm not raising my rates. What I think would be best for you would be another 12 sessions, just like we did over the last six months. It's the same rate." Right? So I would just kind of verbally say that then. And then from there, depending on the energy of the call, like if you feel like the person is just ready to go, you can say, "I might not be reading this correctly, but I just want to ask, are you just ready to step in?" Right? Like, if you can feel that excitement. If not, you can tell them, "I'm not raising my rates and how would you like to move forward with this information?" Right?

If you sense for that client, that they need a little bit of a different offering, like last time it was 12 sessions, but you need to meet every other week or whatever it is, or if you're raising your rates, that would be the point where you would let them know. Right? "I know this last session we met twice a month. Based on what you need moving forward, I feel like it might be better to meet three times a month, or it might be better to meet one time a month."

Or it might be the same amount of sessions, but if your rates have changed since the six months before, that's when you'll tell them that. And if the numbers are different, unless the client wants to know right then and there because they're just ready to make the decision. They're ready to say yes, they just need to know the numbers. I like to just say, "I'll send it to you in an email so that you can look it over," and then set up a second session just to kind of go through it and get yes or the no.

Joanna: I will also just say that next steps processes in some ways can be scarier than enrollment processes for new clients, if you, as the practitioner, are in any way not feeling enough. So you just really also want to check your energetics as you go in to those sessions. Just on that energetic level to come in, even if a client hasn't achieved all the things, because they probably won't, to not be beating yourself up or putting yourself down. Not even for you, for your client, to really

hold that strong space for them to see all the growth that has happened, because guaranteed, there's so much that has.

All right. Okay. So all this being said, let's go through a little bit of this process ourselves with Sacred Depths because we are coming to the theory and I want us to have opportunity to really integrate, just really celebrate and honor all we've been through. We've been through a lot together.

So let me ask you this. Think back to last June. Think back to last June, which in some ways has gone so fast and in other ways is a whole lifetime ago. And first just on the kind of personal level... When I say personal, I mean like through Sacred Depths, right? Like we've learned skills, but then there've been personal, like how you've grown as a person through this course. What is it that you want to honor and celebrate about new awarenesses for yourself, new ways of being, how you're showing up? What's shifted for you? What is it that you want to celebrate? Everybody should have at least a couple of pieces for this personal evolution. What is it that you want to honor and celebrate?

(silence)

And remember things that seem little count big, right? As we all know at this point. Sometimes there's these big fell swoop transformations, but a lot of the times it's piece by piece, by piece, by piece.

(silence)

And a part of this personal piece can be inner pieces and also outer pieces, like getting better at having clients continue with you. Or maybe you brought your first client on, or maybe you did your first group, or sales got easier, whatever it is. You got your offering together. So on that personal level, inner and outer, what is it that you want to celebrate? What's shifted for you? What's looking different now than it did a year ago?

(silence)

What do you know about yourself that you didn't know before? What do you believe that you didn't believe before?

(silence)

As you're reflecting, you can also start to add in client celebrations or coaching partner celebrations. So maybe, for example, a client that had an incredible breakthrough through work that you've done together. Or maybe you did a

Befriend Your Fear process and you had a client that was just like, "Oh my gosh, thank you so much." Or you got through a hard moment with a client. What around your client do you also want to celebrate and honor?

(silence)

Keep on going, there's more. Find the places. Use this really as a space for you to honor yourself and really celebrate.

(silence).

You can also add to the fold here, think about specific skills that you are using and integrating that we've learned. Right? So what has changed? What is it that you'd like to celebrate around how you're holding containers with clients?

(silence)

Joanna: What would you like to celebrate around your listening skills?

(silence)

What is it that you'd like to really celebrate and honor around your ability to create awareness, either to reflect hard truths or to support your clients in celebrating, or your partners or honoring what is? All the things we learned under creating awareness. What is something you want to really honor there, celebrate there?

(silence)

All right. So start to get into the skills, too. Do you really want to honor a way that you've gotten better at strategizing or visioning with a client? Or maybe you have less fear when their fears come up? That's something to celebrate. You may not have totally mastered, for example, the befriend your fear process yet, but maybe you've tried it. Right? That's something to celebrate. You've moved into that.

(silence)

Maybe you've figured something out around supporting a particular person and being more accountable. That's a win. That's a celebration.

Joanna: So even if you haven't achieved all of the things that you want, I want to you to just take a moment. You can even put a hand on the piece of paper that you just wrote on, that paper can ritually take on these celebrations and bring them in. Like breathe in so that you can feel your accomplishments, every single

person in this circle, so much. There's so much. I've seen it, and I've watched it. Honor yourself for your effort and how you've shown up and how you're moving forward.

(silence)

Okay. We've got a little bit more. I'm going to milk it until the very last moment. So from this place, I'm just going to give you like two minutes on this one. What do you want for your skills, your client work, your business and yourself over the next 12 months? So imagine that you are at the end of April 2022, where would you like to say you're at with your skills and your client work, with your business, with yourself? Take a few moments for that.

(silence)

Where would you like to be in 12 months in terms of how you're working with clients, the way that you're working, the level of the skill and the transformation? Where do you want to be in your business? And where do you want your energetics to evolve to next? And of course, we could spend easily an hour on this, but I'm giving you like two minutes just to get going with some thoughts.

(silence)

Give you another half moment on this. Half minute.

(silence)

And then next question, and again, you'll just lightly start to explore this and give you a minute. But when you think about what you want to accomplish next, what do you need on both the inner and the outer levels to accomplish this? What are some things you know you need on the inner or outer levels to accomplish this? So for example, you might know that you need to really work on your questioning skills, right? Or you might know that you really want to go deeper in working with shadow or the befriend your fear process. Or you might know that you need to do the next level of work on your fear of visibility, or support on how to put your packaging together. Right? So this isn't going to be exhaustive right now, but just to dab into it a little bit. For now, at least like two, three things that you know you need, inner, outer, to accomplish the vision.

(silence)

Okay. So I promised you a little something at the end. I have a piece of writing that I want to share with you, that's important for me to share before we wrap.

But before I do, first, just want to say, if you didn't get a chance to complete these questions, please do. It's really good to just assess and get clear. There are a couple of you who have told me that you didn't get to look at next steps pieces in the first couple of weeks. If that's something that you still want to talk about in terms of continuing our work together, more than happy. And of course, love everybody no matter what. And I want to end with sharing this piece of writing that I wrote many years ago, probably like 14 years ago, that I wrote it for myself, really, but I feel like I wrote it for all of the people that I worked with and are meant to work with and have. And so this is for each of you.

"You are a daughter of the earth. You are complete already, whole unto yourself. Your heart is the barometer for what is right in your life. You have choice. At any moment, you can choose to step into the flow, step into your flow, and move with the energy. Honor yourself. Love yourself. Know that you were put on this planet to do amazing things with your love. Open, open, open more, you're ready, always ever unfolding. You are trust. Knowing, knowing, knowing, knowing no matter what, you are here and that is what counts.

"You are magic. Without effort, you are magic. You are so important. You are seen. Don't hide any longer because you and your gifts are needed now. You are alive, pulsating, bursting, opening, moving. You are you in all of your beauty, love, wisdom, anger, sadness. You are you in all your perfect imperfection. You are you and so important. You are sacred and you are called. You hear the calling, even if you don't understand it yet, you recognize it somewhere inside and I invite you to follow. You matter. You have always mattered. You're a daughter of the earth and you hold all the answers inside. You are the one that you've been waiting for."

And with that, I just send all of my love to each of you and my deep gratitude for sharing the space with me over these 10 months. It means the world to me and each one of you have just infused my life these last 10 months with so much. I'm so thankful and I've learnt so much and my heart is even more open. So thank you.

PART 6 OF 6 ENDS [03:01:09]

