Systems & Protocols

Joanna: Hi, everybody. All right. Hi everybody. So before we jump in, I want to acknowledge that for a lot of us, particularly for those of us in the US today, but really probably for all of us, it's not exactly business as usual today and just want to really honor and acknowledge that it's a big day. You may be on edge a little bit as I am, although I'm here and fully present for all of you and so happy to be here. There may be some nervousness or not, or whatever feelings just with the election happening here in the US. And I just want to say wherever you fall on that spectrum of feeling or having feelings or whatever it is, all of it is welcome.

We haven't yet gotten to our work on resistance, but I will share with you. If there is one thing that I have learned in life is that really what we resist persists. And if you're feeling any of the feels, I just wanted to give you permission to be with them and to feel them and to honor them and to acknowledge them. And I know that whatever we have in our midst and in our circle here today will just work to make all that we're looking at more powerful.

But yeah, before we jump in, I just wanted to make space just for a minute or two just in case there was anything around any of this that wanted to be expressed before we look at logistics and systems and templates, which we will do in a deep way, but is there anything that wants to be expressed or set or spoken? I'll share one other piece about this. Those of you that are in Coaching Mastery Circle also you may have seen that I posted this, I believe deeply that as practitioners and as transformational leaders, that our politics are not separate from our work. Our values are not separate from our work.

And while of course, that doesn't mean that we don't honor and respect and hold space for other points of view, I just want to drop it in, like in your sessions with clients in particular in your marketing, share your values. People invest their time, their money, their energy, not just based on the results that they want to receive, but based on shared values. And I don't know about you, but I know for me, I always enjoy the work more when I'm working with someone that shares my values, it goes deeper, it flows better, it's more of an ideal fit.

Okay. So all that being said, this is going to seem not part of client work but this is actually a 100% part of client work. We're going to be looking at different types of systems, logistical issues, templates, things that we want to have in place that will really help us be able to serve our clients better in the work. And I'll get to more what I mean by that in a little bit, and actually before we even go any further, I also want to point out that you have in your member center, I think we just made it live a bonus call with a teacher. Her name is Gena Shingle Jaffe or Gena Jaffe Shingle, I can never remember which way it is, but she's a lawyer and she's specifically a lawyer that has worked extensively with people in the coaching industry, the transformational industry, and a few years back, she did a call specifically for safe adapts on legal aspects of your practice.

And so that relates to logistics and systems and templates. We're not going to look at any legal issues today I'm not a legal expert, but obviously as we look at contracts and different pieces today, it touches on some legal pieces so I felt like that the call with Gina is a good pairing for what we're looking at today.

Logistics and systems are actually way deeper than you might think. It's not just surface paperwork stuff. What we're going to be looking at today, we are going to talk about the nitty-gritty paperwork stuff, but that being said, I find depth in everything. There is something underneath it that's actually very important. Logistics and systems are about so much more than just simply the document that's the scheduling emails or the contracts, or the welcome packets or the progress reports, all of that. The bigger concept behind creating, executing, and upholding all of these systems and all of these documents and all of these materials is really about energetics. All of these pieces support you to hold a strong and powerful container for the coaching relationship with your clients.

So if you remember back to our very first call, part of the fiber of aligned energetics in the client relationship is about creating and maintaining that strong container, right? And again, I'm a visual person I think of it like a glass of water. The magic, the transformation, the depth is like the water in a glass of water, the container is the glass itself. You need the container, you need the glass in order for the water, the transformation to happen for movement to happen. You couldn't get the swirling of the water unless you had it in the container, unless it was contained. And things like scheduling emails and contracts and welcome packets and all the different logistical pieces and templates and payments and all of that, they actually help. In addition with all the things we've already looked at with energetics and containers, but those things actually help create that container, create that cup.

How? Why is it that these things help create the container? Because they create clarity and confirmation around expectations in the relationship, both for the practitioner, as well as for the client. They create clarity and confirmation of expectations. So for example, something as simple as we're going to be meeting at this time, this is the payment plan. This is what you do if you need to reschedule. This is my responsibility, this is your responsibility. This is what happens if we come to the end of our session and we haven't finished our conversation. All pieces like that help create clarity and confirmation around expectations and when there's clarity around expectations, there's more of a sense of safety. When there's clarity around expectations, there's more of a sense of safety. And part of a strong container is to in some ways, have a sense of safety.

Think about it. When you know what to expect from someone else, and you know what is expected of you, then you can settle in, then you can relax, then you don't need to worry. Will she be there for me in this way? Or won't she? Am I supposed to show up in that way? Or am I not supposed to show up in that way? There's a sense of peace and safety and reliability when all parties know and agree upon expectations. And then when those expectations are reinforced throughout the relationship.

For those of you that have been around young children and toddlers, it's the same thing for them, right? They thrive on expectation and routine. We know that snack time is happening at this time. We know that nap time is happening at this time. This is the bedtime routine and order. Those things create containers and they create senses of safety and then magic can happen, things can happen once we know that we have that matrix. So just to give you one example of this, and I'm sure you all can think of your own personal examples of this, but I'll just give one of my own. I was once on a sales call with a healer that I was considering hiring. So I was on the prospect of things and we had a very short conversation. She didn't ask me too much.

She asked me what I needed, why I was there. And then she just said to me that her program was $1,200 for seven weeks and would I like to purchase it. And I really liked this person. She had come highly recommended and I liked her energy and all of that, but there was no way that I could step into a container like that. It didn't feel safe to me. It felt risky and vague and there were a lot of unknowns. Like how many sessions was I getting for that $1,200 over the seven weeks? How long were those sessions? What did she think that we could accomplish in those seven weeks? Was she going to be available in between sessions? How was it going to work? So sorry guys. Starting off powerfully with expected expectations in place makes all of the difference. It's part of the container setting.

When you work with a client, the container that we've been talking about since the very beginning starts to get set and created well before your actual first session with the client. It gets created through the enrollment process and it gets created through all of these logistics and these expectations and these agreements. If you don't start setting the container beforehand, then either the first session is going to be shaky and possibly subsequent sessions will be shaky, or I've seen for some people a first session not even happen because of it. Meaning the prospect says, yes, they agree to work together but because you're not creating a container for them, they go into fear or resistance or confusion or whatever it is and then they don't show up for the first session. And they pull out of the work.

I have had that happen to me when I first started coaching, for sure, until I started putting these pieces in place. So the more clear that you can be from the get go, the less misunderstandings that there are going to be, the less confusion that there's going to be. The more structure there will be so that people can settle in. When there's a structure, when there's container, when there's the matrix you can settle in. And this isn't just about what we'll be looking at today, it's mostly what we set up in the beginning, but then how we continue to uphold that container. Penny is saying yes, better boundaries make for a safer and more fund playground 100%. And we're going to be looking at boundaries as a piece of all of this. We're going to be looking at that today. So contracts and welcome packets are a big part of starting off powerfully and setting the container.

So if you don't already have a contract and welcome packet, these are things that I want you to start thinking about for your client work. And even if you do already have a contract and a welcome packet, based on our session today I want you to go back and see if there are places where you can amp it up, where you can use it to even tighten that container even more. In a second, I'll get to some of the things you ought to be thinking about for your contracts and welcome packet. I just want to see, Allana has a question. How much detail do you go into on the enrollment call? Is that more of a program guide that you send after? Okay. So in terms of how much detail I go into in the enrollment call, that's all in the enrollment training workshop, but I don't talk about in the enrollment call what's the rescheduling process, or late payment or anything like that, I save that for the contract and the welcome packet, but we do speak about what are the expectations? What we're going to accomplish? How many sessions? That kind of thing.

If you're resigning a client, do you need... Yes, always new contract when you resign. And then I use a modified welcome packet for a client that we sign. You'll see, we'll get there. I have a questionnaire in there and sometimes the questions will be a little bit different. Penny's asking... Yes, you guys are going to get templates for it, tons of templates after our call today. It may have already dropped in the member center I'm not sure. And I want you guys to feel free to use. It has been a lot of work for me to get these templates together and I want you to feel free to adapt them and use them for yourself.

Alana's asking, "Do you do a new visioning session too when you resign?" Our very last call of sacred depths, one of the things I'm going to teach you guys is a process that I take clients through to support them in resigning.

Okay. So what are some of the things that you want to be clear on first for yourself when it comes to these pieces and then for your clients? So to be clear on that with your clients and put that into the contract in the welcome packet, these are just some things, and you'll see, when you look at my examples, you'll see all the pieces, but I do want to just speak about some of these pieces right now. You want to be clear on how many sessions. I mean, I know this is obvious, but still there's so many practitioners that don't clear on this. You want to be clear on how many sessions the contract includes. You want to be clear on how long it is, right? I mean, some of you guys may have run into this yourselves or have heard stories where it's like 20 sessions, but the scheduling is all over the place and it takes two years to schedule out the 20 sessions, right?

You want to be clear on the length of the container. You want to be clear on how long the sessions are. You want to be clear from the get go besides session time, what else is included in the work? Is email included? Is Voxer included? Voxer is like a voice. I use it with clients and we don't have that in our contract because that's new. I'm just thinking I have to add that in. If someone just needs a voice to voice with me, like it's a way of leaving a message. Do you include drop in calls? If it's like an emergency SOS 15 minute call in between sessions, if you are doing email or Voxer or something like that, what's the turnaround time on emails, right? That's really important.

If you have email that's included and a client shoots you an email and they're expecting you to answer that day, that business day, but you guys haven't set agreements on it and you answer two days later, it's going to feel like a leaky container. There's going to be frustration on the part of the client. There's going to be an expectation that hasn't been fulfilled. And you want to be clear. Like, for me, my turnaround time is 48 hours on an email, like 48 business hours. So my clients know upfront. Usually I'll answer quicker because that's just how I am. I'll answer within the day or the next day. But I like them to know it's not that that I haven't forgotten about them, it's not that there's a break in the container, it's not that I'm not focused on them, that I need two business days.

I'm also clear like with copy, it can be longer. If I'm going to review a full sales page, if I have like a two day retreat that I'm leaving coming up and someone drops the set, right? They know that that's going to take longer. This is small things, but they're big things. This will help so much. You want clients to know what if they need extra time? How is that handled? What does payment look like? Obviously they need to know the number amount to say yes or no. But what does payment look like? If they're doing a payment plan, how do they make payments? Is it going to happen automatically? Is it up to them to fill out the PayPal link or whatever it is. As I said earlier, what is the policy if payment fails or is late? You want to be clear on all of this. Again, understanding these expectations just helps with everything.

Confidentiality. How do you handle confidentiality as a practitioner? How can the client's schedule? You guys know I recommend scheduling all sessions up front, even if it's a year, and then if people need to reschedule, whatever it is, even if you're not doing that, is it the 15th of every month we schedule for the following month, so that people know what to expect, how can they reschedule if they need to reschedule a call? What's the process for that? You want that upfront in the contract, in the welcome packet. What's the rescheduling policy. My rescheduling policy is that within 24 hours, I do bend that. If there's an emergency or something like that, usually I give a grace for if the person forgets like the first time, it doesn't happen very often but sometimes it does.

But what is your risk? Because if you have a policy that if they cancel last minute and there's no good reason to cancel, that's it, they lost the session, that needs to be set upfront. That expectation needs to be set upfront. What's the scope of the work? For some of you this piece may not come into play, but for others of you, it may. So like when I'm working with someone one-on-one and we do business coaching, I'm clear on the scope of the work. I don't really know much about Facebook ads, that doesn't go into the contract, but I speak about that in the enrollment conversation. Like, I can help you with the messaging angle into the ads, but if you're looking for funnels and all of that, that's outside of the scope of our work.

I'm thinking of one client, that's a natural path. Part of the scope of her work is she also prescribed supplements. You want to share that that's the scope of your work or that you don't, or that you can provide that, or whatever it is. So for some of you, you're going to want to think about what the scope of the work. This is back in like phone terms because I still do most of my one-on-one calls on the phone, but whether you do it on zoom or whatever it is, what do you do if I don't pick up? Like sometimes I'm not going to pick up at exactly 1:00 PM. Maybe I'm running late with another call or this or that. It can cause a lot of confusion for a client if they call you or get on zoom and you're not there, you want to set up beforehand. You want to let them know I'm usually on time every now and again, I might be running a few minutes late.

This is what I do, if you call me and I don't answer, it just means that I'll be there in a minute, hang up the phone, wait two minutes, call me back. So then there's not this confusion like, is she going to call me back or am I going to call her back? And then you waste like five more minutes trying to figure it out. Again, these are little things, but they're actually big things that help everything run more smoothly, create this tighter container so that everybody feels more safe in it.

PART 1 OF 4 ENDS [00:25:04]

Joanna: It feels more safe in it. What's the refund policy? You want to be clear on that. I have in my contract, what happens if you want to terminate your relationship? Right? That hopefully will almost never happens, but what's the protocol if you do? If the client does? Or if the practitioner does? What are the coaches or the practitioners responsibilities? And what are the client's responsibilities? I like including a section on that, right? I like for my clients to show up, to be prepared, to show up on time, to do the homework.

Every now and again they may be distracted and have to be in their car, or walk their dog or whatever, but to have the space to really be present. What are my responsibilities to the client? How will I hold them? How will I show up for them? What can they expect of me? So let me pause there for a moment before we get to what's next. Any questions on this? And again, you'll see all of my templates for the welcome packets in the contracts. And [Gina] also has in her recording a lot of great information on contracts as well. [Shauna 00:01:23].

Speaker 1: Yeah. I have a question about COVID right now, with me doing my priestess training, my nine month program, and then watching all the numbers go up in Sweden with COVID, I was wondering if I should put something in the welcome packet into the contract if I, or one of my family members, or even a client got COVID, how would I word that? How would I deal with that? And have you thought about that yet [Joanna 00:01:59]?

Joanna: I just want to make sure I understand what's behind the question. Is it because you guys are going to be meeting in person? Or meaning if you get so sick that you have to terminate a contract?

Speaker 1: Well, yeah. I mean, if I did get COVID or... And I've actually got nine or 13 women doing the priestess training, what then? So I also-

Joanna: Are you asking about because you're meeting in person? Or just because too sick to show up kind of thing.

Speaker 1: Yeah, probably. I mean, I don't know. I hope and pray that I don't get COVID, but I think that some reality that all of us have to consider. And I was just wondering if you have considered it.

Joanna: Yes. So I'll answer your question a couple of different ways.

Speaker 1: Okay.

Joanna: So in terms of this getting sick piece, we haven't added COVID specifically to our contracts, but I do believe, and I'm not 100% sure on this, I need to go back and look, but you can look too, because I'm sharing everything with you. There is something in there about if I need as a practitioner to reschedule. Because sometimes I'm going to need to reschedule. My hope is that I wouldn't be so sick that I would have to end a program completely.

But I feel even though that's not in the contract, I mean, maybe that is a good thing to put in a contract. What is the refund policy? Or whatever the policy is, that may be a thing that you want to think about. I'll just speak transparently. I don't think I would at this point put that in. I don't think I would put that in. But if you feel that that's important, and that's important for your people, 100%. The other piece I'll share is that last year... A lot of my programming has in-person retreats, and last year because of COVID, there were two retreats that couldn't happen.

And I didn't know when those programs started. There was no such thing yet as COVID, right? And so we had to scramble and decide what we were going to do. It wasn't appropriate for the type of work we were doing for it to be online retreats. And so we had to put systems in place for that. But this year, for programs I'm offering... I haven't offered my retreat heavy programs, but there is one program I offered that I'm hoping, hoping, hoping the shadow weekend or the shadow retreat will be in person.

That I was very clear. And this is part of what we're talking about here. From the get-go I said, my highest intention is for the retreat to happen at this state, in person, for us all to be in the room. But there is a chance that we're going to move this retreat online, and I will let you know, as soon as I know, but if you're signing up for this program, you need to know that there is the possibility that we may not be in person for this. There isn't going to be a refund for it. We're going to do it online. Right? And so that was part of setting that container. That answer your questions?

Speaker 1: Yeah, I guess I was thinking in regards to what some of them, some of my clients might just see the numbers, because it's all over the news that the numbers in Sweden are going up through the roof at the moment. And I then didn't want any of them to maybe feel apprehensive about signing up for a nine month program. And then wondering if I should just put something in there to give them that comfort and that safety, but then also, I don't want to draw attention to-

Joanna: I think for what you're asking [Shauna 00:06:20], I think it's providing an opening for people to ask refunds when there may not be a need to. Obviously if somebody is very, very, very ill I would expect you to allow them out. But if you keep... But then in a contract it's hard to put parameters around what's very ill and what's not. So I don't want you to open yourself up to just people who decide, because resistance happens that they don't want to continue, oh, it's getting scary.

That kind of thing. I mean, what you can say is to just let people know, if you have to miss a session, or two, or even a month of this nine month program, there is space to make it up. I'm available to you for this, that, and the other, to support you when you're ready to make it up. But that's a nice way to set an expectation, but not this open... And you can leave if someone in your family gets COVID, but it lasts for two weeks, whatever it is. Does that make sense? [crosstalk]

Speaker 1: Yeah.

Joanna: Good.

Speaker 1: Thank you, makes sense.

Joanna: Gloria.

Gloria: Hi, when you were listing the certain things to be clear about, I was wondering what you meant by if the client needs extra time.

Joanna: So if you come to the end of a session, and you haven't gotten through everything, that's one. But the other is every now and again, I'll start working... And this happens almost never, but I still like to have it in there. It becomes clear that the client is either a much slower processor than I had realized on the enrollment conversation, or there's... They say that they just needed help on this, but then the sales page, and the website and all the things, is there a way for them to add extra sessions on?

And what is the rate to add extra sessions on? So that if at any time they want to add... Even for this program, we have that. Or when you came in, if you want extra sessions with one of the coaches, there is that opportunity, and this is how much it is, and this is how long the sessions are kind of thing.

Gloria: Okay. Thank you.

Joanna: Yeah, you're welcome. [Alana's] asking if there used to be an in-person shadow retreat with this program. There was a higher level of sacred depths that had shadow and a little bit because of the pandemic, but mostly because I pulled shadow out with other juicy techniques. I just made it into its own next step after sacred depths. Okay. Any other questions? We're going to go more into this, but just any other questions for right now?

Speaker 1: I have a logistical question. All the information that is in sacred depths in our members portal, is that available to us when we finish? [crosstalk 00:34:35].

Joanna: It's available.

Speaker 1: Oh, oh, that's great. Okay. Thank you. Thank you.

Joanna: Okay. So, all of this may sound pretty simple and easy. You just put these contracts together, make sure... Or maybe it doesn't, you put the contracts together, include these details, but it can often feel really hard, and really heavy for some of us. Challenging either to set out, to actually create, or to enforce if it comes up, right? If it comes up that somebody is late for a session, or misses a session, or doesn't pay, it's one thing to have it in the contract, and then it's another thing to uphold the boundary to not go over time, whatever it is.

So all of this has to do, and [Penny] mentioned this earlier, with having healthy and aligned boundaries. And I will share with all of you, to normalize that particularly when I started out as a practitioner, I did not have very healthy and aligned boundaries with my clients. I had sessions that went over time, all the time. I would give tons of extra time without charging. I mean, I still would give extra time without charging for sure. But I mean, I'd give a lot of extra time without charging.

Someone would have a failed payment, but I would still do their sessions just thinking they're going to pay at some point over. And then fears about things. I had fears when I brought on my first virtual assistant that if I didn't personally schedule with all of my clients, they would feel disenfranchised. And my assistant wouldn't know how to schedule them the right way. And then they won't want to work with me. And so I held onto the scheduling piece for so long.

And then when it was time for me to stop collecting checks, because it just got to be too many clients, and too many checks, and all the things, and it was so apparently clear that I needed to switch to credit cards. I lagged on that for months because I was like, they're going to feel like it's not hand-holding, like all of a sudden I'm a big corporation and if I take credit... I had resistance every step of the way with the boundaries. And Nicole was saying, she's working on the piece of giving lots of extra time.

So, so much as [Shauna] is saying as well, so much of what we're talking about today has to do with boundaries. And we could do a full session or three sessions just on boundary setting, and activating what I like to call the warrior woman archetype. I'll talk about her a little bit. Because warrior woman is what we need in order to set strong boundaries. But there's so much material that I want to share with you today. So we're just going to spend a few minutes looking at boundaries right now. First of all, let me just talk a little bit about this archetype of the warrior woman.

The warrior woman is absolutely loving, and absolutely generous, and absolutely respectful, yet she knows what her boundaries are. She values herself, and her time, and her energy, and she isn't afraid or reluctant to put down a boundary when it is being crossed. The warrior woman takes responsibility for herself, without taking over responsibility for others. She respects herself, and she respects others. She doesn't see it as a crime, or in a front, or something bad to take a stand for herself.

For those of you that practice yoga, I always see the warrior poses as poses that are about setting boundaries. If you think of warrior one or warrior two. It's a very clear [inaudible] setting boundary. And that is the warrior, right? The warrior it's not about fighting, right? It's about taking a stand for what is right. And putting a boundary down on it. So some of you have already started to answer this question, but I'll formally ask it. Where do you struggle when it comes to setting boundaries with your clients?

And if you don't have clients yet, you can answer this question in general with anyone, with colleagues, with friends, with family members. Where do you struggle? Maybe it's in your pricing, right? Like you have a price in your mind that is the right aligned price for your work. But then when it comes time to utter the number in your enrollment conversation, it's always lower than the number that it should be. And then wherever the struggles are with setting boundaries, what's the impact of having trouble setting those boundaries? What has been the impact on you? On your business? On your energy? What's the impact?

Let's see what's going on in the chat here. Gloria's saying she goes over time, she loses track and underestimates the timing in sessions. Sometimes you wonder if you should say that they're 60 to 75 minutes. So this is actually, this is important too. Right? So sometimes we think we are being amazing to a client by giving them extra time, but we need their, what's their permission to give extra time. So I've been on the receiving end of a session where, massage actually, where I thought it was a 60 minute massage and that this practitioner happened to be an over giver.

And it was like the massage ended up being an hour and a half. And I didn't exactly know because it was a massage, but I could tell. I started getting nervous. I had to be somewhere. Whenever I get to the end of a session with a client, if I see that we're not quite done and I happen to have an extra five minutes, then I'm happy to give it. I don't just go over by five minutes, I actually ask the client, do you have an extra five minutes? Is it okay? Again, expectations are really important.

So to answer your question [Gloria 00:00:44:03]. Yeah, if you just know that you need somewhere between 60 to 75 minutes to get through, maybe that's just your style, it's not because you're over-giving but that's just your style. I would let people know that it's a range. I would even say most of the time it's going to be 60 minutes. I really try to keep to 60 minutes, but let's both put 75 minutes in our calendar in case we need the extra time. That's a much safer agreement and expectation than just consistently going over.

The other problem I have seen for people, is they consistently go over and then when they actually stick to the time the client is like, why aren't you giving me the full 75 minutes, it's like, no, the session is actually 60. Right? So it's so good to be clear on these things. [Alana's] asking, what if there's a situation where a client is going through something intense and he wants support? Absolutely. This isn't about, we never give extra time or extra sessions.

I mean, my clients will tell you I do give extra time. Right? If somebody really needs it. And most of the time I actually won't charge if they're going through something that they really need it. If it's more of a habit, or they just didn't need all the extra time, that's when I charge for extra sessions. [Shauna's] saying when they're struggling and you over-give, and you don't charge enough, and then you get tired, and then the impact is the time with family, right? And our energy, same thing Nicole's saying, when you go over time it drains your energy. Right?

And it's not because a longer session is so exhausting. Although it may be it's more because the boundary has been crossed. And then our energy gets strained. And then Nicole was saying then she doesn't have enough time in between sessions to re-energize. It is sometimes hard to end a session if something big comes up at the end of the session, that's why you actually want to start wrapping up about five minutes before the session is done. You want to start talking about takeaways, and integration, and all that. It's not a perfect science. Sometimes something big will still come up.

Cindy is saying sometimes she adds extra sessions at the end of the package, and doesn't have the client pay for them if their goal wasn't reached. Yeah. Cindy, I'm so glad you're calling yourself out. I understand the... I don't want to shame you for this at all. Okay. I understand that it happens more than one would think. And I'm so happy you're calling yourself out on this. You're right. The extra sessions feel awkward. So there's always more work to do. You want to resign into the next package. And Cindy if you want to come on voice to voice and talk more about that just let me know. Because I think it's important for all of us. Penny. Oh, Cindy, go ahead [crosstalk 00:47:14].

Cindy: Yeah. It's hard because I work with parents who are trying to get their babies to sleep. And then sometimes it's a mis... I don't want to say diagnosis isn't the right word, but I have underestimated the amount of work that needs to be done. So then I'll say maybe eight sessions is enough, but then it's really 12 is what they needed to get the goal met. So I either have to be more clear about the fact that sometimes the goal isn't always going to be met in eight, for I have to make my package longer, to accommodate for the fact that sometimes they aren't met.

Joanna: So I think, yes, yes 100% either just make all of them 12, and be that way, or let people know sometimes you need an extra four sessions and this is the rate for those extra four sessions. And we will probably know, it's not that we'll know by our eighth session if you need an extra four, will let you know by our fourth whatever it is for you.

Or the other piece there Cindy is to see if you actually can get more specific in the diagnosing in the enrollment conversation. Look through your clients that have needed eight, versus your clients that have needed 12. And what have the differences been. And can you ask questions about that upfront to suggest which package is right for them.

Cindy: Yeah. I think part of it is my own inexperience just because I'm a fairly new practitioner and not... Like I said, being thorough enough up front. Do I need to change the way I enroll people at the beginning too.

Joanna: I mean, this is just going almost purely on intuition and a little bit what I know about human nature of practitioners, my guess Cindy is that probably everybody would be served with 12 sessions. You're just scared to go there upfront.

Cindy: Yeah maybe.

Joanna: I'm so glad you're bringing all of this up. It's good things to think about.

Cindy: Yeah. Thank you.

Joanna: Yeah. Thank you. Penny.

Penny: I was just remembering when I started private practice eons ago, and getting clients they would be like, I can only come Tuesday at 7:00, I can only come Thursday at 8:00 [inaudible 00:49:49]. And they were all over the maps. And I was just exhausted and had big gaps of time. It was a crazy person, right? When I had kids, I decided that I wanted to work during the day. I only wanted to work Monday evening.

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Speaker 2: ... Decided that I wanted to work during the day, I only wanted to work one evening at night. And that was what I wanted. Those were the hours that I wanted to have, period. And once I made up my mind and everybody said, "Oh, you can't do that in private practice, people have to come in the evening, you'll never fill your practice," the minute I said, "No, I have 11 o'clock on Thursday, I have this time," I filled my practice. Nobody ever said no basically. I mean, a handful of people. It was like magic, but it was me making the commitment.

Joanna: Yes. I'm so glad you're bringing this up. It's so true all around. And I'll share that I had the same exact experience until I had kids. I would see people at 10 o'clock at night. I had so much fear that there wasn't going to be enough clients, 10 o'clock at night, six in the morning, it didn't matter. And I always say that kids are great for setting boundaries because you almost have no choice or any responsibility that's really that big, right? But it is true, and this goes back to energetics, energy follows energy. When we are clear on, "This is my schedule and this is when I am available," the aligned clients will fall into place. We don't have to take people all over the place. Thank you for sharing that.

Okay. So if you do have trouble setting boundaries, I want to just talk a little bit, just look a little bit deeper at that. And we already have done this a little bit in our first call on energetics, but I want to kind of get a little bit more specific. So if you do have trouble setting boundaries, why? There are a couple of reasons?

One reason might be if you're someone who is skilled at over-giving. If you're skilled at over-giving, chances are you're also someone who pretty consistently takes over responsibility for other people in your life. Taking over responsibility means that you don't think your partner will really be able to take care of the kids or take good care of them so you cut your work or your social time short to be at home. Or taking over responsibility means that you don't know if your clients will do the work that you assign them to do so you spend lots of time on email and checking in on them over and over again, so that you "make sure that they're moving ahead." Taking over responsibility means that you undercharge your services because you don't trust that your prospect will value themselves enough to make the higher financial commitment. Of course, sometimes they just cannot afford it, that is a truth, but a lot of times, it's because we don't trust enough.

If you look at over-giving in this way, it kind of looks like over-giving and over-responsibility have quite a bit to do with needing to be in control because you don't trust in other people to take care of things or get things done, or take responsibility for themselves. By the way, I'm sharing this both in the context of our call today, but also this will help you with clients that have trouble setting boundaries. So if you recognize the tendency to take over responsibility for others in your life, then I want you to really consider what I'm going to say next, and really take it in.

By taking over responsibility for others, you're actually not helping them. On the outset you might think you are, but truly if you try and play God and take on the responsibility that others should be taking for themselves, you are robbing them of the opportunity to step up to the plate, to develop themselves and to feel good about having and holding responsibility. So for a moment, just consider how you might have always just blindly believed that your over-giving is serving other people and maybe consider that that's not actually true. And a lot of things, sometimes the over-responsibility, it helps you feel needed. So true.

And so that actually dovetails into another reason why you might have trouble setting boundaries. So a second reason for over-giving or having poor boundaries is you're scared that if you have healthy boundaries, that you will end up alone or unloved, that you will end up alone or unloved. And this one I have found is really one of the core pieces for almost anyone who struggles with boundaries. It's kind of like a core wound of the undeveloped warrior woman that I was talking about before. It's this fear that you'll be alone if you aren't over-giving. I can't see all of you on my screen right now, but just kind of shake your head or raise your hand if you know what I'm talking about here. Yeah.

You're scared that your clients won't want to buy from you if you set boundaries, that they won't like you anymore, your friends will leave you, your kids will shrivel away, your team members will be horrified by you if you set the boundary. That's how I felt when it was this simple thing of moving from checks to collecting credit cards. It's like, "They're going to just think I've become this whole hard person." Yeah, a lot are saying people pleasing, exactly. So let me ask you this, just to consider for yourself for a moment. Even if you think of yourself as a super independent person, are there areas in your life where you're scared of being alone and that's a cause of poor boundaries?

The next reason why you might have trouble with boundaries or over-giving is that you're scared you're not good enough. We spoke a bit about this on our very first call. So if, for example, you don't think that your skills are good enough, then it's really hard to charge a certain amount. Or if you're scared that you're not good enough, then it's hard to end a session when it's time to end the session, because you feel like you haven't given enough. Or if you feel like you're not good enough, you may end up continuously checking in on clients in between sessions when that's not really needed. If you're scared your service isn't valuable enough, it's hard to end a session on time because you sense you might be able to prove yourself more, just those 10 more minutes, then I'm going to prove that it was a good enough session.

And then the last reason just right now for us to just briefly take a look at for not holding to your boundaries is that you're scared of either another person's anger or your own anger. This one is a doozy, particularly for women. When I do do shadow training, it's one of the shadow pieces we look at very deeply, but I want you to just think about this for a moment and see if this one applies to you. In general, in society, we aren't taught how to properly express our anger. We're not taught that anger is a natural emotion that comes up for people. Instead, we're taught in subtle or not so subtle ways to ignore anger or avoid anger or see anger as a bad thing.

The majority of examples in popular culture that deal with anger illustrate it as a terrible, overwhelming emotion that ends up in killing or destroying or hurting. And of course, this is one possible expression of anger, that's an expression of anger in shadow most of the time. Truly, it's a last resort response to anger when anger isn't dealt with upfront and properly, but most people don't fully realize that and instead, we come to fear our anger and then the result is often that we try to over accommodate others instead of upholding our boundaries or we're scared of other people's anger and so we don't uphold our boundaries or we maybe try to cover up our own. I've done this before, not intentionally, but I've realized afterwards I actually cover up my own anger at somebody else by over-giving. It's like, I get angry and then I become so shamed and how could I be so angry? And then I'd give them more.

So taking all of this into consideration, all these reasons or other reasons that may be coming up for you, when you think about the places that you're either not establishing strong and aligned boundaries or holding strong and aligned boundaries with clients, or it could be with others, for you, what's the biggest fear or limiting belief behind the not establishing or holding the boundaries?

I'd love to hear from you in the chat, or if somebody wants to come on voice to voice, what are you seeing that's important for you here around boundaries? We're going to get back to more materials and looking at logistics, but I'd love to hear from one or two of you what's becoming clear here for you, what are you seeing?

Speaker 1: I have something to say, but I don't have any clarity on it because in the last two seven-week journeys that I've run, I've noticed consistent them not knowing where to find the Zoom link. And I put it in the Facebook page, I put it in the email, I put it in the messenger, it's in three places and they still have a hard time getting on. And I've found it actually amusing because it's like, I'm doing everything I can to make sure that they know where to go to get it and it's still every single time a problem. And I mean, I don't know what that's about, I don't have any sense of clarity on it because I know I'm being really clear. And so, yeah, it's actually really frustrated me.

Joanna: Yeah, so this may have to do with boundaries and may not, but I'll just share briefly on this. If that's happening consistently and you're sure that you're being clear and do you want to address it, then probably it has to do with resistance in one way or another. And you want to just really name it and say like, "I'm noticing, even though I'm being really clear, people are showing up late or not able to show up, they're having confusion because of the Zoom link. And because I know that you've been given the instructions and all you have to do is click on the link, my sense is there's something else going on here for you and so let's explore that together." And I would actually just explore that as a group. I think it is about boundaries in the sense of you're like, "Okay, get with it people," right? But I think also there's some inner peace resistance pieces you want to look out there so I'll link you on tha.t.

Speaker 1: Okay, that makes sense. Okay. Thank you.

Joanna: Swati is saying she has a fear of disappointing others. Yeah, it's a big one. Rose has a fear of anger of others towards me, scared not knowing how to handle, saying the fear of being unwanted. Yep. Jordan is saying voicing my own anger still holds fear of abandonment. Yes, that if we're going to show anger, that will be abandoned. She can see herself overcompensating when she's angry because of the fear, right? These are things that we do, one of the ways that we can... And it doesn't always have to be anger, right? It's just about valuing ourselves. But whatever it is is when we set the boundary where we're channeling the anger in a healthy way. Good. Yeah, Kathy's saying she can see that she overcompensates. Yeah, Gloria is saying, what about the opposite? Too strict of boundaries to protect something. A hundred percent, it's like both ends of the pole.

When we do shadow work, we can really see this. There's the hyper and the hypo of any situation, some of us tend to the hyper, some of us tend to the hypo. Good. Okay. So much more we could look out for boundaries, but there's still some other pieces I want to make sure we get to today.

So I want to quickly just run through for you the way that I kind of set up the container before getting to a session, the first session with someone. I've already mentioned some of the pieces, but I just want to kind of go piece by piece. So number one, at the end of a sales process, after a client has said, "Yes, I want to work with you, here's my credit card," all of that, before we get off that call, I do a couple of things. Number one, I schedule our first call together, and then Talia will help the client schedule out the rest of their calls, but I'm already setting the container, we have a call set on the calendar. The container is there. So I'm scheduling that first call.

And then I'm also going to explain what happens next, right? To give that sense of safety, also excitement of like, "Talia is going to get in touch with you, you're going to be getting a welcome packet, there's a questionnaire." I'm letting her know what is happening. The expectations are being set. As you guys know, schedule out all the sessions beforehand.

One thing that I find important for a container is consistency in sessions. So unless a client has a specific need, I try to schedule sessions out. For some of my packages, it's every two weeks, for some of my packages, it's every three weeks. I don't recommend almost any of you, unless you've been doing this for a long time, not to go every three weeks. I happen to do that in a particular kind of way with some business coaching clients, but you don't want to have a five week gap if you can help it. So when they schedule out their sessions beforehand, consistency is really important.

And part of the upholding the boundary, it used to be that Talia scheduled all sessions for people, now they do it online. I know some of you probably have the online scheduling. I'll have Talia go through it, you can do this on your own. If there happens to be a big gap, we'll reach out and say, "Hey, I noticed that there's five weeks in between this call and this call, Joanna recommends that you do it sooner to have consistency." If you have too much time in between calls, leakier container, right? Sometimes somebody is going on vacation or whatever it is, and it's a different story.

The other thing, and I mentioned this, but I just want to mention again, is that if somebody signs up for a six month engagement, you will want to keep the sessions within the six months, you don't want to go over the six months. So we try to get that set up ahead of time. Clients also get a welcome letter. It's kind of like a welcome letter and a welcome questionnaire, the whole welcome packet, I'll say. So in the welcome packet, so first people sign a contract, right? I'll go step by step. Before we even scheduled beyond that first session, contract signed, because I don't want my team starting to spend a ton of time if we don't have the contract signed and we don't know that we've sealed the deal.

After the contract, we do the scheduling and they get a welcome packet. That includes a letter. The letter you'll see in the template is like celebration, "I'm so excited we're working together." It affirms the client's choice to step into this. It helps them feel special, it gets them excited. There's a welcome questionnaire that I really try to have people fill out before we get to our first session. Some of the questions we've already gone over in the enrollment process, some not, but it's a way for the client to start investing in our work together before we even get to our first session. And again, that helps strengthen the container. It's obviously also a way for me to get a lot of quick, easy information by reading the answers. I give you a sample of my welcome questionnaire, but my welcome questionnaire isn't going to be the same as yours. You're going to want to adapt it for your needs, for what you work on with clients, for what you need to know or for what you want them to be an inquiry about before you even get to your first session. I really think of the work starting there with the welcome questionnaire, even before we get to the first session.

But some things you do want to think about for the questionnaire. So number one, this is obvious, but I can't tell you how many people mess up on this, personal contact information. So you want your client's phone number, address, email, right? I can't tell you how many times I've had a client tell me they need to get in touch with their client and they don't have their phone number because they've just emailed, whatever it is. I like to ask for when their birthday is so I can wish them a happy birthday, if they have a partner and what their partner's name is. I like to ask if they have children or pets, just any information that I might need to know that impacts them/.

I like to ask about short-term goals and long-term goals. So for me, if somebody signs up for any amount of time, I ask for goals for the first three months, and then what are their year long goals? We probably have already spoken about that in the enrollment conversation but I like to go back over that. I asked them what their strengths and their resources are. I ask about habits, I ask about resistance. One question I really like to ask in the questionnaire is either, how can I best support you? But what I like even more than that is the, do I have permission to question. Do I have permission to call you out, to hold you accountable? Or, what is the best way to call you out and hold you accountable? I like to just set that expectation up ahead of time. If you're working with me, I'm going to be calling you out, just going to set that expectation up ahead of time.

And then any other background information that you might need. If I'm working with someone on their business, I ask about their existing marketing and their understanding of their message and how big their community is and what's working and those kinds of things, but whatever it is for you.

So that's all the kind of pieces before. The other piece that I include, I think I've mentioned this to you guys before. Oh, a lot of you guys asking, can you make it a shared Google folder, absolutely whatever works best for you. So this next thing I highly, highly recommend is having a progress report or an accountability report that your client fills out before each session. So don't overwhelm them with a million questions, just a couple, three, five, six questions, but it's an opportunity for them to think about the upcoming session before they get there so they're already prepping, and then it's a way for you to get any background information that you need so that you can go into the session and just get going with it.

It really can help, you get more things done during a session to get that background information. And what I find is it also helps me manage my time in the session, because I know already ahead of time, what are the different things that my client wants to make sure they get from the session? So some of the things I ask in the accountability form, I call it an accountability form, you can call it a progress report or a check in form or whatever it is, I always ask for celebrations first. We already reviewed celebrations and creating awareness. I like to have this consistent practice throughout the work of, "What are you celebrating since we last spoke?" Gives the client an opportunity in case they've gone down the negative rabbit hole, or haven't been fully.

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Joanna: In case they've gone down the negative rabbit hole, or haven't been fully owning what's going well for them to consider that. I always ask, "What's your big goal?" That kind of stays consistent throughout the work together. Just because sometimes we can get disconnected from our big goal. I ask, if it's for business, I ask what marketing have you done since our last session and how has it gone? Usually, I know, because they've emailed me, we've been emailing about it. But anyway, I like to ask a question of, "What is your inner wisdom telling you right now?" Sometimes I ask the question, "What opportunities are available to you right now?"

Some clients like that question, other clients hate that question. And then, "What would you like to focus on... for our time together?" So you can play with this and adapt it. Sometimes I adapt the focus report based on each client. Like if I have a client that really wants to have a regular meditation practice, sometimes we'll add them for a period of time to the progress report or the focus report. Like, "Did you practice your meditation regularly since we last spoke?" Or whatever it is for them. Gloria, do you have a question?

Alanna: Yes. I wanted to go back to when you were sharing around scheduling with clients. So I have a client right now who has resigned, she's in the second program with me for four months. I kind of know the solution as I'm saying this, like at least one system that I could set up, my scheduling calendar only rolls every 60 days. I'm getting my clients to book the first four sessions upfront, and then they'll book the second four. She's halfway through and she went MIA after that fourth call. It's early October and I've emailed her, and interestingly she paid still like the second half of the program as well. So I'm just wondering like what happens when clients go MIA?

Joanna: That's a good question. And so first of all, that just is more evidence to my point of scheduling everything out ahead of time, because there's less of a chance of a client going MIA. If you've got calls on the calendar, that program is more set, but if they do, my perspective is you handle it the same way if a friend would go MIA. I would call, "Are you okay? I'm concerned. Even if you're not ready to schedule calls, can you get in touch? I just wanted to make sure that everything is all right." So that would be my first kind of line of defense, which I would try. If they still didn't come around, then I might start sending notes, just talking a little bit about resistance and how resistance can happen. Are they feeling scared or if you have a sense of why, you get more of a coachy end of things, but I would really start with like, "You're so much on my mind. I'm a little worried. I hope you're okay. Let me know what's going on."

Alanna: Okay, beautiful. It also trickles into the container of the length as well because now that it's delayed a month... I have to think about this. She's a committed client and it's a really great relationship. So I think it is just a matter of trying to get in touch with her and have the conversation if it goes over by a month, I'm prepared to have that happen for now. But yeah, it's something that I want.

Joanna: So that's another good point. So first, yes. Do you just want it from your heart? Right. Always from our heart, it's just outreach. I would call and then what you're saying just reminds me of something. We have one of the things that I do, people rarely ever use it, but I have it that you can freeze your program for a month if you need to, because sometimes things happen in life, somebody passes or you're moving or who knows. So I do have it peaked in, if something happens and you need to freeze for a month, we can.

Alanna: Okay, cool. Great. Thank you for that. That's great.

Joanna: All right. I'm going to keep on going and we'll have time for questions at the end, but I want to make sure I get through all of this. I do not anymore use a midway progress report or a midway call, but I do want to share with you that that's something that you can do, it's like have a special call or just a progress report in the middle. Like if it's a year long at the six month mark, or if it's six months on the three month Mark where it's just like checking up on progress from the beginning. So if it was a call, you'd look at where you started and where you're at and where you're going and have things, have goals changed.

Some people like to have a midway assessment, something or other' I don't use, I'll just share, I don't use it anymore just because I find we're always tweaking goal. I'm always tweaking goals with clients, as we're going along and the celebrations, the progress and where we're going is really baked into every session. So if you're doing that, it's not so necessary, although it's a nice flourish.

Tell: Containers.

Joanna: People usually know that they have to set a strong beginning to a container. They oftentimes forget that you also need a strong ending to a container. We spoke about that in actual sessions. You always want to end the session with a takeaway, but at the end of a contract with a client, you want to have a special call at the end to close the container or reassign them into the next container. As I mentioned earlier, we're going to do a whole training on that one because what you'll find is like the deeper you go with your transformation skills, the more people, the more opportunity there is for people to want to continue working with you. And so I want to give you specific instructions on how to leverage that out the wazoo.

A couple other pieces I want to make sure I mentioned client care is part of the container. It's part of the relationship and it has an energy to it. What I mean by client care is it's not just the What of the policies, like all the policies we've been talking about, but it's also the How, how are you caring for client... Not in session time, but right in between session time. I already mentioned the responding to emails. That's a policy, right? But also it's how soon are you responding to emails? Just like a quick story, I once worked on the client end with someone who's an incredible practitioner, but she just never responded to emails. I didn't actually end up completing the container with her because I, it was hard for me to keep on going, because I just didn't feel like she was there with me in between sessions at all.

Are you following up on the things that you said you would share or send that's part of the container? If you say in a session, "I'll send you this.", Or "I'm going to follow, I'll check in on you." You've got to do it, that's part of the safety. Now I am really bad at... If I tell a client, "Oh, I have this template I wanted to share with you." Or, "I wanted to send you this article." I know that I don't have the capacity for it. So I say to the client, "Will you email me?" "Email me as soon as we're done with this session so that it's in my inbox and then I will send it to you." So if you're, if you're like that, just put that little safety hatch in.

In your communications around systems like scheduling or rescheduling, or whatever it is, it's not just about the policy, but again, the energy of the communication. If somebody writes, "I need to reschedule." What's the energy that you're responding to that with? For example, Talia has a template and when I did this myself, I did it myself. I'm not... it's not just, "Okay, let's reschedule." But, "I'm so happy to help you reschedule." Or whatever the energy is for you. But what is the energy with which you're doing these things.

One more little piece I want to make sure I mention. On your very first call with a client, I like to spend just the first five minutes of the call before we really get into the session, doing a little more container setting. What I usually do just on that very first call is, I remind the client that I'm there for her, not just in the sessions, but in between sessions. I remind her that I want her to email me in between sessions. I always want her to let me know what she needs and then at the end of the very first session, in addition to asking what the takeaway was, I'll ask, "So how did our first session go for you?", "Is there anything that you want me to tweak about the session?" It's just little things that help set the container in that way.

All right. Your homework is to review all of your different templates or start creating them. If you don't have them, you're going to get one, two, three, four, five... At least seven templates from me. So you can take a look, look at all of that. Take a moment and write down What are you taking away from this session? What's been most important for you from this session? What are you taking? [Silence]