



Sacred Depths Certification

Systems and Protocols

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Hey everyone, welcome, welcome. Good to see you today okay

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for people in the US this week is for some folks, it's a Travel Week. So I hope that a lot of us will be here today. But if not, if you're listening to the recording, glad you're listening to the recording and happy that we're all here, I'm really excited for oops, I forgot to turn my email off. I'm really excited for

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our session today. So we today

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we're gonna be looking at logistics, systems, templates, and logistics and systems are actually you know, everything and sacred depths we make deep there is actually they are way deeper than you might think there's the outer pieces, logistics and systems. And they're, the harder part are the inner pieces about it. So this is about so much more than simply the document, that you're the scheduling email documents, or the contracts or the welcome packets, et cetera, we are going to be looking at those logistics for sure. And just so you know, you're going to have in the member center templates of like so many of my, the templates that we use on my team for scheduling and rescheduling, and contract and welcome packet and payment and all of that. But the bigger concept that is kind of at the heart of creating, executing, and then upholding all of these systems and templates in your business and with your clients that the concept underneath it is about energetics. This is these things contracts, welcome packets, scheduling, payment. This is all about the powerful container of the coaching relationship. These are important pieces to having a strong container. If you remember back to our very first call in this program.

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The one of the biggest pieces

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of aligned energetics is creating and maintaining a strong container. The container is what helps promote trust and vulnerability and appreciation and motivation and forward movement. Right. So how is it then that something like a confirmation email for a session or a welcome packet can help create and maintain a powerful container?

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Because these

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things create clarity and confirmation around expectations in the coaching relationship. They create clarity and confirmation around those expectations between us and our clients. And they create that clarity and that confirmation both for our clients as well as for us. And having clarity and confirmation around expectations creates a sense of safety. There is safety in that and safety is part of the container. So think about it for a moment when you know what to expect from someone else. And when you You know, what is expected of you? That's when you can settle in, you can relax, you don't need to worry. Is she gonna be there for me in this way? Or isn't she? Or am I supposed to do this? Or am I supposed to do that? Right? When we're clear on the expectations, then there's more of a sense of peace and safety. And reliability is right when there's that agreement. And then also, when those agreements are reinforced throughout the relationship, as by way of comparison, I don't really do this much anymore. But for many years, one of my side gigs was that I was a wedding officiant in New York City, and I worked with all different kinds of couples who are coming together in union. And a big piece of the work that I did with couples is getting clear on what were the agreements of their marriage. What were the expectations of the marriage? What do they think of marriage was right, and coming to some, like shared agreements on that, so powerful to be able to do that? For those of you that have been around young children, we kind of see how safety is created through agreements with young children to when they know what the rules are, even if they don't like the rules or fight against the rules. But when they know what the rules are, when they know, this is what's expected of me. And this is what's expected of my parent. They can settle it and they can settle into routines. For example, we first we eat dinner, and then there's a book and then you know, we get ready for bedtime. It's like through that agreement and the upholding of that agreement. There are safety that is created. So I was once on a sales call where I was the potential client. And it was someone I was considering hiring to help me stop biting my nails. Because I was I still kind of am a little bit of a lifelong nail biter. And I was really considering hiring this person. She came highly recommended, she did EFT. And we got on the sales call. And you know, I just said a little bit, I want your help, because I want to stop biting my nails. And basically, she just said her program was \$1,200. And it was seven weeks and what I like to buy it, aside from that not being a very powerful enrollment process.

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There was no way that I was going to step into a container. That was that vague, it didn't feel safe. It felt like there were too many unknowns, right when she said it's \$1,200. In seven weeks, I asked her questions like, how many sessions are we having? Over those seven weeks? How long are the sessions? What do you think that we're going to be able to accomplish? In those seven weeks? Will there be homework or things for me to do in between sessions, I needed to have some of those understandings and those agreements in order to feel like I can even be in this container.

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So

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that's to say that starting off powerfully with clear agreements, is essential. In a coaching relationship, it's part of container setting. And I really think about that the container gets set. Well before my first session with my client. We're setting and building the container honestly, from the moment we have an enrollment

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conversation.

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And we're starting to get clear on the agreements and what the work is about and how we're going to work together and all of that from before that. If you don't set that container and even start to think about it before the first session, things can be really shaky, but it's Have you get to the first session, or I've seen this happen for

people, they don't even get to the first session, someone like says yes and signs up. But then they get lost and fall off. Somewhere between the Yes, and the actual starting to work

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together.

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The more clearer that you can be from the get go. And of course, things will change too. Sometimes in containers, you want space and flexibility for that for sure. But the more clear that you can be from the get go, then the less understandings they're going to be or less confusion there will be moving forward, the more structure there's going to be so that everybody can

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settle in. Let me pause there for a moment.

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We're gonna get into details and pieces and enter and like a lot more, but I just want to pause here and ask what is feeling important so far? Like, what are what are you hearing so far? That you're like, oh, yeah, that that is resonating, or that feels important? Or I see where already, like, I kind of see where maybe I've messed that up in the past a little bit. Or when I've been somebody else's client, it hasn't quite been there. And I've felt it. Who wants

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to share on that? What are you seeing

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what's feeling important? How is this relating to your experience?

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I'll go real quick. Hi, everybody. Well, I'm definitely a newbie, I'm definitely in terms of the longer coaching thing. And so I have my first client was somebody I know, since maybe 20 years, but haven't seen in all these years. But anyway, I just set up a five session. thing with him. I am definitely nervous. So what everything you've just said, I mean, if I could just focus on that even to get started and to build that first day. And that first connection and honest communication and setting the space for safety and all everything you just said, feels really, really good. I just feel I feel safe now. Like, okay, just chill guy. Yeah, you know, just get that down. And then, and then the rest will come. And I'll see how it goes from there. So I'm really excited. I'm

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excited for you. Yay.

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Yeah. And with five sessions, I would still we're gonna talk about welcome packets and contracts and all of that today, I would do that for this client, I'd really set that. So we'll we'll take a look at all those P's and Q's,

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because I'm not there quite yet. But but that's good. I'm looking forward to that. Thanks,

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Courtney.

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Hi, Joanna. Thanks. This is actually what this is bringing up for me is

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gratitude. There it

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there is an issue that I'm having that we're having right now in a group program with someone who is very disruptive because she keeps trying to break out of the systems and she keeps interrupting sessions to ask logistical questions, and try to get answers that are totally unrelated to what we're doing. Excuse me, and I'm

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and I'm, I'm so

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it's so nice to be at a place in the business now to where there is there are systems in place, and there's documentation of systems and to be able to just say, like, gonna stop you there. This isn't the space for you for that question. You need to go talk to Janet, who's our OPM and and, and the same person keeps doing this every session. And today, it happened again, and another student, like popped up in chat was like, go talk to Janet. She's got all the answers. And I was like, yes, it's so great that not only are the systems there, that I can fall back on them. And it doesn't have to become a whole derailment. But that the other people in the container also feel safe enough to be like, we know that this exists. Go find it over there. Yeah.

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Yeah, it's such a great example of how powerful those systems are and how they really and with groups to how it keeps everybody safe. Yeah. And in the container, a couple things I wanted to add or just anything to toss to you. So first of all, just for anybody that's listening to what Courtney just shared, and you're like, oh my gosh, but I don't have an established business within OBM and systems and all the things and so it's not good. I just want to say you can do this even as a solopreneur where it's just you and you're not going to have all of the systems ready tomorrow but you can build piece by piece by piece. So just like deep exhale

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for everybody. I didn't mean to introduce anxiety for anyone. No, no,

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no, I don't think you did. But I know like that can sometimes. And then I just wanted to toss this, it sounds like you're all handling it really well. But I suspect from what you're sharing that there's like a little bit of resistance, energy going on for this person, the fact that keeps coming up, and it keeps on coming up and it keeps on coming up. Like if the way that you're handling it, you feel is fine and good. Don't even need to do anything else. But I just want to offer to think about, it might be worth not a long conversation, but a short private conversation with her to see like to say like, I know, you are such a capable person, and you're so smart. And I know you're thorough. And so it's interesting that this keeps on coming up this confusion around logistics. And you know, I know that sometimes that can be based in fear. And maybe create some awareness there for her because that feels like one of those repetitive things. It's not just like, she just doesn't know.

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Yeah, they're definitely thank you so much for pointing that out. Yeah, that that really feels resonant.

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Okay, good. Lisa.

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liked what you said about the safety. I hadn't really seen it quite like that before. But it seems that's really super important for everyone. And I just wanted to follow on from Courtney's point, because I think when we're working with groups, it seems to me, it becomes even more important to be really clear. Because I think with one to one, you can kind of do it a bit ad hoc. And if I got something wrong, or you know, I need to explain it again. But when you've got a groove in front of you, to me, and that's evolved over the years, I mean, through bad situations and good situations. I had one client who turned up drunk quite often. That was interesting.

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Yeah, yeah, no, absolutely. It's it's such a good point. And, you know, we don't get too much into groups here. But what I will say is that, for groups, there's the systems and the templates. And then the other part of this that goes along with this piece is the shared agreements in the group. Yes. And I've also learned the hard way, over the years, about shared agreements, and they're continually evolving. And if anyone is interested, just to see some modeling of it, you can go back to our very first call, where I didn't do like everybody raise your hand if you agree to this, you know, this agreement. But I went through like how I didn't even call it rules. But I spoke about diversity in the group and honoring everybody's experience. You there were certain pieces that I spoke to that was part of what we're talking about here of this creating safety through shared agreement.

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You thank you for the reminder, because I can remember noticing that at the time, so yeah, thank

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you. Yeah. Good. All right. Let's keep on going. So

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Tantra contracts, and welcome packets are a big part of starting off in an empowering way, and setting the container. And I want to just kind of go through some of some pieces that I want you to consider including in your contracts. And welcome packets. i We have a contract. And then in our welcome packet, it's part questionnaire and part just kind of like going repeating some of the rules, et cetera. And again, you'll get templates of all of my things that I'm more, you know, feel free to work off of them. The one thing I'll say about it is, while I have had a lawyer, look at my contract, I am not a lawyer. So I would recommend if you're putting together a contract for the first time, have a lawyer look at it. You'll all get as a bonus call that goes along with today's call actually, from a lawyer who specializes in this perimenopause, I'm forgetting her name right now. And she, Gina Jaffe. And she goes through some of also from like a legal standpoint, some things you want to be thinking about in your documents as well, it's a really good call, I highly recommend it.

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So

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all right, what are some things that you want to include in contracts and welcome packets? How many sessions are included? How long are the session? This next one a really important one, are you including email or other types of communication? It's is that included in the package? And this is a very important piece. If so, if email or VOCs, or texting or whatever it is, is included? What is the turnaround time on it? That's an important piece of the expectation, right? Because if you're telling a client email is included, and you and the client is thinking she's gonna respond to me within the day, and you're thinking I respond to people within the week, but that hasn't been stated. Your client might feel betrayed or ignored or abandoned, or, you know, whatever it is, right. So you want to be really clear on that turnaround time expectation. I like to include in my contract, welcome packet, this one is usually put more in the welcome packet. But what if a client needs extra time? Do I offer extra time? Is

that extra time they have to pay for it? Is it just on me? And in case you're all wondering, the way I work with private clients is if we need to hop on for 15 minutes or 30 minutes? Usually that's included, it won't be regularly but if every now and again. But if it's kind of more of an extensive thing, then it's a separate session that almost always they'll pay for although I'm a softy every now and again, I won't. But my clients are also signing up much of the time for year long, expensive packages that include the full container, right? But you want to be clear on that. You want to be clear on what is payment look like not just what the number is, but what are they how can they pay you? How do you make payments, you want to be clear on your policy of what happens if a payment fail if they're doing monthly or whatever payment plan if it fails, or if it's late. Having shared agreements on that so important. You want to be clear about confidentiality. And again, you can feel free to use any freezing that I share with you in my templates. But that's an important piece like what is confidential in the container. Is everything confidential? Are pieces confidential, etc. Again, we're not talking about groups, but I'll just toss in there. We all have you all signed in your contract for Sacred depths. Something a piece around reusing pieces of the recordings and getting permission on that so long as you're not mentioning names or specific things we have like specific wording on that. You want to include the sounds so simple and basic, but it's still important. How do you schedule? What happens if you need to reschedule? What's the protocol for rescheduling? What's the amount of time you know, do you have a 24 hour in advance policy a 48 hour in advance policy? If you're not clear on that, then someone can cancel last minute and just think they're just getting that session whenever right now maybe that's your policy, and that's okay. But be clear with all of that. In the contract, I like to include what is the scope of the work? So for me and probably for a lot of people and again, go and look at my language in the contract. I'm very clear that I'm not a therapist. I'm not a financial adviser either, just just so that it's explicitly stated. I have a client that is a natural path. And in that section of her work, you know she speaks of her contract she speaks about the difference between supplements and medications and how it's not in her scope to not only prescribe medications, but give opinions on medications, like she's very clear about what her scope is and what her scope

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isn't.

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Another thing I like to include more in the welcome packet than the contract. What if you call me and I don't pick up right away, right? That sometimes happens, you're into the bathroom, you might be running a little late, it's different than going into a waiting room for a practitioner. So like, what's the protocol? Sounds like such a silly thing. But you don't want to get into like, you see, they called and then you're calling them back while they're calling you back. And from this connection and all the things or, you know, the client is like, Oh, my God, did they forget whatever it is, right? So for example, for me, I say, if I don't pick up when you call, it probably just means I've run to the restroom or on the phone. I'm wrapping up another call, please wait two minutes, and then call me back. Like that's my protocol for it doesn't have to be yours. But good thing to think about? Like, what's the policy for that? What if you want to terminate the relationship? Or the contract? What's the policy for that?

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Is there a refund policy

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that's involved in that? And then I like to just also think, you know, what are the coaches responsibilities? And what are the clients responsibilities? You know, are there any other things in there that feel important? showing up on time, etc?

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Let me pause there.

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Any additional thoughts or questions on what to include? Or what else this is sparking for you? For contracts, and welcome packets when it comes to shared agreement?

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What about recording? is, I don't think I mean, I don't want to record a session with me, but I want to respect them. But if they want to, I don't want to do that.

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Yeah. It's a great question. So you know, what is your policy on that? Right? So guys, if you're just like, no recordings, if that if you if that is what feels aligned, then that's the policy. I don't generally send out recordings, but if someone requests it, then we will send out recordings, and we'll put that into the contract. Nikolas asking in the chat, or saying in the chat, the agreement on how to end the relationship sounds really helpful. It's something that you've missed before. Yeah, good. And I have some language on that. And the template that I'll share.

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Here is Oh, I know

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what I wanted to say this thought popped into my mind. For welcome packets, as I said earlier, it's part like, Here are some helpful thing we call it, we don't call it rules, we call it like, here's some helpful things to remember to make the most out of your work to gather our work together. And we list the things. And then the second part of the welcome packet

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is a questionnaire.

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And I think we've spoken about the questionnaire already. But again, you'll have it in an example of it in the member center. The questionnaire is another really, I think intro questionnaire, a powerful way of setting the container. Based on the questions that you ask your client to fill out it, like they're starting to pave the way of the work, they're starting to think about different things. And then you're getting a lot of great information about them to go into your work together with. So there's all of that going on. But this is like a subtle point that I want to make it because I think it's powerful in a client relationship. I also ask questions in the questionnaire of things like Do you have a partner? If so, what is your partner's name? Do you have beloved pets? If so, what are their names? A couple of I asked a couple of personal things. So that like, even if it's not related, quote, unquote, to the work like if I'm helping them build their business as it comes up, if they name names, or whatever it is, I know who it is. And it just, it really helps to save that relationship. The third thing that we include in our welcome packet is a pre call form.

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That ideally,

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I like for clients to fill out before every single one of our sessions and email to me 24 hours in advance. It's questions like, what's been resonating for you the most since our last session? What do you want to celebrate? Where have you what has the forward movement been? Since our last session? Again, you're gonna get templates on all of this. What has your inner wisdom sometimes I'll include what has your inner wisdom been sharing with you since our last session? What has been hard are standing in your way right now? What is it that

you want us to take a look at, or what do you want to receive from our session? So it has, it will, I'll share upfront the template for and give instructions on how to use the pre call form, I find a pre call form to be a very powerful tool that really it helps me know where my client is at, especially if we haven't been in touch since our last session. It helps the client do some free thinking and feeling into where they're at from week to week or session to session. And, and prepare for the session, it gives me information that then we don't need to rehash necessarily pieces of it take that time during the session. So it can be a really useful tool, and Julie is asking, and this is what I was gonna say next, it can be a very useful tool when people actually use it. But many times people don't use it. And so just want to name that is like I still after all these years. There are some clients that love pre call forms, and they are like spending all their time and, you know, filling out all the things there's some clients that they couldn't do it, it's one sentence answers and and that's still good, it's fine. And then there are a couple of clients that it just like, it doesn't matter how much you tell them. This is important. And this is helpful. And this is part of the process. And like all the things, they're still not gonna do it. And that's okay. Right? Always coach the what based on the who? I mean, well say I think it's okay, I'm never going to tell a client, they can't be my client, because they don't fill it fill out the pre call form, they'll understand that we might be losing some time in the session. If they don't, they'll understand that they're not doing all the work that they could be to move forward on their goals, like, so long as I'm clear on that. I'm cool

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with that.

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So yeah, we can't force them to do anything. Also say I have some clients that totally disregard the pre call form and they just send me emails beforehand, their own free form of what they feel like sharing with me. The other thing I just want to say about the pre call form is that most of the time I have it templated. And people answer the same questions no matter who they are. But as we move forward in our work, sometimes I'll tailor the questions on the form for that person, or for that period of time for them. So for example, if we've done some big work around their confidence, or they're good enough nervous, and I really want them to continue to like pave the neural pathways and the energetic pathways, I may add a question to the pre call for him have you been tracking over a year since our last session, what situations you feel worthy what situations you don't feel worthy? What are you know, two actions that you've taken to you know, blah, blah, blah with that, so we'll talk about it on our call, I'll say hey, you know, I think we should adjust your pre call form for the next few weeks so that we can like address this and hold this in this way. So really like to use that pre call form as kind of like a living, breathing document and tool for the work.

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Okay.

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Anything that wants to be set on pre call form or questions on

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that? Hi, Carmen. Hi. Hi. Um, at one point in life, I was very seduced by the idea of the prequel form, to work with my clients. And I think between my mindset and the energetics underneath that, and the anxiety that I was feeling about it, it didn't come across in a way that they were motivated about it. And in true honesty, sometimes I can spend 45 minutes in that catch up time of our hour and 15 minute session. And I just would like to hear some extra feedback on how to frame it, and they're genetically and verbally, potentially to, for that pathway to be smoothly paved. Yeah, I think

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I think I get what you're asking. So tell me, I'll answer and you can tell me, I mean, my thing is always to just say it like it is with love and compassion, like, to be honest, right. And so I straight up will say, you know, one of the purposes of the pre call form is for us to use our session time as efficiently as possible. And for you to get the most out of this container and our work together. If you don't fill out your form, that's absolutely fine, we can absolutely go in and have a super powerful session. But it might be that we spend a good part at the beginning of the session, 30-40 minutes that we didn't need to spend catching up, because I could have read it in the pre call form. You know, but that being said, it's your choice, right? Like, we always want to give choice to our client, you know, whatever feels right for you, and how you use your time is up to you. And if there is, if someone is like intrigued, but they're like, you know, have certain questions, or this that or the other thing, then you know, I might say like, what so what would be better? Is there a different? Just one question that you want to answer that you know, or do you want to just send me a check in email beforehand, or you know, what would really work for you here? And then we go from there. But yeah, I contextualize it just with the truth that this is the truth of the situation. Is that helpful?

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Yeah, it does make sense. It does make sense, I do feel that a lot of the resistance that are projected on it, when I tried to implement it was years back, was the fact that I was still feeling my clients were thinking of my work with them as a commodity, not necessarily a growing process. Yeah. So why would they invest that time on doing that catch up? You know,

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such a powerful example, again, of energy follows energy and how we feel about the process with our clients and about the pre call forms, it can lead a lot of the

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way. Yeah. Thank you. Natalie,

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I want to answer your question, but if you can hold it till the end, and I think that would be a great place to talk about taking

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notes. Oh, okay. So, maybe all

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of this sounds pretty simple and easy. We just put our policies and agreements into our welcome packets and contracts, and we're good. But what I know of soul lead practitioners who are really caring is that even if it sounds pretty simple and easy, it can often feel really hard or really heavy, to share contracts or to uphold contracts if an agreement has been broken. Just quick raise of hands, raise your hand if he like there's a part of you that feels that way or gets that that it's like, it's a little hard. I know I have certainly been there and I still sometimes go there as well. Um, so let's talk about this for a little bit. This time I stood a piece of this, I think a big piece of this has to do with having healthy and aligned boundaries.

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So

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less so now I still it can crop up every now and again, with upholding

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pieces

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now, but really more. So when I was first starting, it came up a lot. And I was just like all over the place. I mean, I would go over session time consistently, I would give x all be offering me extra time, but I'm offering extra time all over the place. I even went all like up in arms and anxiety when I realized it was time to move from checks to credit card payment, because I thought my clients would be like, Oh, she's so corporate. Now she's, like, I was scared to tell them that I we weren't gonna move to credit cards, I would get failed payments. And I would still continue showing up for sessions without really saying anything. So I just share all of this to normalize for you, if you're like any, any part on the spectrum of that just to say I get it, like I really, really get it. And it takes some awareness and work on the boundary piece. And one of the things that I've really come to learn is that it actually is not only helpful for clients, but it is showing love to our clients and to our containers to uphold boundaries. And I want to just also say, some coaches will say what I'm about to say is wrong, but I'm just I'll speak my truth. And you can see if it lands for you with flexibility. So for example, I have a policy of like, if you don't show up for a call, and you don't let me know, then you've lost that we're not going to reschedule that

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call. However, if it's the

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first time that it happens, or someone got caught in traffic, or their kid was sick, or they just like their their responses that they just like happen to forget the first time. I personally am not going to hold them to that I'll reschedule that first time. Right now not saying you should that doesn't have to be your truth. But I guess what I'm saying was like, there are rules and we want to uphold rules. And then sometimes rules are meant to be broken. Also, we don't have to be so rigid

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all the time.

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Okay, so

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let me ask you this question. And you can journal on it for a moment. Where do you struggle when it comes to setting boundaries with clients? Or if you don't have clients? You can answer the question for anyone, colleagues, friends, family members, where do you struggle when it comes to setting boundaries

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if you've got clients answer it for that with clients.

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And please share in the chat so we can normalize and get different ideas and awarenesses of maybe where we're not holding boundaries, but we didn't even realize that there was a boundary there. So Nicole is saying time maintaining the container of our sessions and then reschedule the rescheduling part

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yeah

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Lauren says sometimes I struggle with not actually naming specifically the thing that I see or feel maybe going on more talking around it. Yeah. Natalie says me going over time Um, but I'm okay with that. Is it a question mark, but I am okay with that with your time. Yeah.

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Lisa,

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I get it. Lisa feels like you have to be strict or uncaring. And that's what I'm saying. It's it's a kindness, actually. But we'll take a look at why it feels that way. Jennifer's saying failed payments and still having an appointment.

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Yeah.

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With people that you want to please are not upset personally, Angie saying. Financial asks, honoring your worth flexibility on time. Yeah. Okay. So, in a moment, we're gonna look at a couple of deeper pieces around boundary setting, this isn't going to be exhaustive, we could spend a lot of time actually an advanced step that we do a full two day retreat on boundaries. But before we go there, because a bunch of you mentioned going over on time, I want to just toss this thing that I have learned about that, that I think is really helpful, it's can be really useful. So if you've consistently been going over time with a client or with all of your clients, a great way to come back to the agreement and uphold the boundary. And you can do this via email if you want, if it's easier, but is to send an email. And it can either be to just that client, or it can be BCC to a group of clients. And to basically in the letter, say, you know, I want to acknowledge that we've consistently been going over in our session times. And I want to acknowledge that I've let that happen. And not honored our agreed upon session time. And while of course, if you need extra time, every now and again, we can talk about it and acknowledge it and see if we both have a little time to give. While we while that's great, but moving forward, it feels really important to honor our agreement to honor my time, and to honor your time by holding two hour 45

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minutes.

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And so I want you to know starting on our next session, I'm going to be honoring our container in this way.

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I like

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this approach, because you're not blaming your client, you're not like making anything wrong, you're taking responsibility because you are the holder of the container and you're letting them know that there is going to be a change right because it sometimes can be weird if you're always going over without saying anything to then just be like we have to end at the 45 minute mark whatever it is so it's it's an honest compassionate honoring way to get back on course you can apply the same idea to if someone has been paying late for example, or or whatever it is, it can be applied to a lot of different

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situations. Natalie yeah, thanks

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Joanna this tour so I have so many things on my mind with the so I'm pretty good with my boundaries for the most part, but some what something happens so there's, I don't I don't go overtime with all my clients but with a few clients, I a couple clients I do. And I'm I'm conscious of it. And it's kind of like how the conversation flows kind of thing. But what's interesting is that one one of my longest clients, standing clients where I've gone over time with her so many times it's ridiculous now like it's par for the course. She said to me because I was I didn't show up for a call we had because actually most of the time and when I finally got her she said, You know I know you always run late on time, so I just assumed I was like what she was she was telling me and I'm like no I don't run late and miss and be late for my clients. Ever, but it was, it was a whole new way of looking at how she saw that. Yes. So what we're seeing now is learning in a whole different way. Yes, yeah, I'm

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so glad we're talking about it. It's so it's so true, right? Because people then make up stories about what it means. Or they forget that it was actually 45 minutes time, and then they expect an hour, or an hour or 10. The other piece, and I've shared this, I think in this group before, it's actually not a trauma informed practice to go over time without acknowledging it. So we think that we're doing our clients a big favor, by just going over time and giving them more and all the things but for some folks, depending on what kind of trauma they've experienced in their lives being held in a certain place is really triggering, we might think the client just has like all the time in the world and wants to stay on. But really, their their trauma response is to not say I actually have to go, I have another meeting or I have to go to the bathroom or whatever it is, and we think we're giving so much but actually, it's it's not right for the client. So if I am, it is looking like, Oh, I could use five more minutes in this session. I will say to a client, I won't just go over five minutes. I'll say, you know, I have an extra five minutes. I'd love to just finish this one piece. Does that work for you? Would you like for us to hang on for that? Again, getting a shared agreement even on that?

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I have another thing I want to bring up here too. That's been tricky. That that this is good. What you just said about? So no, I think I do acknowledge it some of the time that by the time but I don't deny it. That's a new fix I can do with that. And because they I don't know that what they have to do. I don't know what their schedule is. So that's really good. So one of my clients who isn't too enrolled, and it's happening with her reenrollment. She's been paying late, like not just a couple of days. And she's and so we only it six months, and she gave her 14 Stone points DOMA plan. She's in pain, like two weeks late every single time of the installments of this reenrollment I had. So here's where it gets tricky. I know she's got some stuff with money being tied up and all this stuff. So there's a problem. And I do send reminders every week saying you're late, you're late. But that's I don't, to my to my platform thing. But I don't personally send anything about it. She eventually pays.

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But a part of me is like, I don't say anything about

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it on the call. Because I think I met my mother one time. And I don't know when she may have brought it up. And she's like, you know, the money thing? And I'm like, Yeah, I know what it's like. So I'm kind of like having a hard time with this one. Like, it's a reenrollment she's committed, she shows up all this stuff. And I know she's got on her word. But it's almost like, she's not even saying not let me be laid in. And I mean, like, so it's kind of like, so what point at what point am I being too flexible? And at what point is she now almost disrespecting, you know what I mean? Yeah,

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yeah, absolutely. So okay, so we're going to, in a minute, start looking at inner pieces on why this is so hard. So people have already mentioned, but we're going to, I think that's going to help you know where the line is. And then what I'll say is on a logistical level, if you decide that you are being too flexible, which it sounds like you are

just because I can hear like you have some conflicted feelings about it. You can just spend a few minutes and say to the client, you know, I just want us to acknowledge together, and we have a little bit in the past, but I just want us to acknowledge together that you've been paying Li and you know, and I would say like no shame in that, and I am not judging you, or anything, but I think it's important for us to acknowledge it together. And you can say, I understand that sometimes you need to pay later. And you know, I feel like that is okay with me. But my request is if you are going to pay late that you let me know. So that I'm not left wondering what's going on. Is that something that you can agree to write and to just say that with utter respect, right? Because that stuff can bring up shame, right, just like utter respect of the other person and and love but to create that agreement together. Yeah. And I

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love what you say and I hope I can say exactly the exact words you just said. And I know it was even though I love what you said it will still be hard for me to say it because of my own my own stuff, you know

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We're gonna look at that right now. So perfect, perfect segue.

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So

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to just continue on with that, why might you have be having trouble setting boundaries or upholding boundaries and agreements? Now there are a couple of different reasons. Number one, if you are someone who is skilled at over giving, as I am, if you are guys, raise hands, if you are skilled at over giving, then chances are you are also someone who pretty consistently takes over responsibility for other people in your life. There is a difference, believe it or not people between generosity and civility sideline. But there is a difference. Taking over responsibility means that you don't maybe you don't think your partner's going to really be able to take care of the kids or take care of them well. So you cut your work time short, in order to like do all of the things that they said they were going to do. Taking over responsibility means that you don't know if your clients are going to do the work that they said they were going to do. So you spend a lot of time on email checking in on them over and over again, to quote unquote, make sure that they're moving ahead.

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Here's the thing,

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if you look at over giving in this way, it kind of looks like over giving and over responsibility maybe has to do a little bit with your need to be in control, maybe by quite trust other people to take care of things or to get those things done, or take responsibility for themselves. And I will just say if you are like me, someone who was made to be or had to be the Savior in your family, the adult the only adult in the family when you in fact, actually were not an adult, you may have some of these tendencies of taking over responsibility. It's like a survival thing, right? Like we are going to die because I cannot trust anyone else to actually take care of things here. If you're recognizing yourself and what I'm describing, I want to offer you to consider the by taking over responsibility for your clients, you're actually not helping them on the outside, it might look like you are you might think that you are but truly if you try and play God and I say that like dramatically, right because we're trying to control here when we do this and you take on responsibility that others actually 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 even if until this moment you have believed that take that over giving is your way of loving others. This is how you love

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I want to

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ask you to consider that maybe it's not a healthy way of loving and that actually allowing others to find the pride in their own owning their responsibility is a much better way

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of loving

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Alright, let me pause there. What is the spark game? Is this resonating and how so what's feeling important in this I need to

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do what you just said now isn't resonating for me on a personal level in my personal relationship. So thank you for saying that I feel like I don't have this problem that much in the relationship with clients because somehow they are proven high achievers, and I trust them that they will do the things because they have a track record track record, but it hits made the poor my personal relationships. So thank you. Yeah, you're so welcome.

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I'm glad that it's creating awareness there. Anyone else want to share we have time for one more?

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No, okay. Keep on going. So,

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here's another

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reason why people,

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practitioners can over give or have poor boundaries in their client relationships or in any relationship. You're scared that you'll be alone or unloved. If you uphold the boundaries. You're scared that you will be alone or unloved. You're scared that your clients aren't going to want to continue to work with you. If you uphold the boundaries, or your friends won't want to be friends with you anymore.

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If you uphold a boundary

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it's kind of a core fear of ending up alone. So even if you think of yourself as a super independent, self sufficient person, are there areas in your life where you're scared of being alone? Are there areas in your life where you're scared of being alone. And by the way, I should say everything that we're learning today around boundaries is for us as practitioners but also good, like this was good, this will come up in our client work also whatever relationships there and so this is also just a awareness and wisdom for you on all of it.

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Do you have any clients or you're working with any clients right now who are maybe not upholding boundaries in their lives because they probably have a fear of being unloved or low.

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Good to have awareness, when we get to befriending fear and rewiring negative thought patterns and like all the different tools and the next part of the program we'll look at how to go deeper to work on with all of this. But for now I want to create awareness because the awareness just in and of itself can be enough to change start changing

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some things. Here's another

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reason why I'm practitioners oftentimes have trouble upholding boundaries if you're scared or worry that you're not good enough. So for example, if you don't think that your coaching skills are good enough,

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then

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you might be going over time to make sure the client like getting all of the value, right because you didn't give enough value in the agreed upon

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time. Trying to prove yourself

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by the over giving or compensate for yourself by the over giving. They didn't pay but I don't know if they're really getting a lot of value from the work so I'm not going to say anything about the payment being late because I'm not good enough and so I don't want to bring attention to me not being good enough. By talk Talking about the late payment All right, and then one more reason that I want to make sure we name that can come up when it's hard to hold boundaries. And this is a can be a biggie for people, sometimes. If we are scared of anger, other people's anger, or we have our own anger in shadow, it makes it very hard to set or uphold boundaries. The fear is that if we uphold the boundary, the other person is going to get angry, and we won't be able to handle it, or we're gonna get hurt because of their anger. In general, in our culture, we aren't taught how to properly be with the natural normal energy of anger. We are not taught that anger is a natural emotion that comes up for people. And we're taught in subtle and not so subtle ways to ignore anger or to avoid anger. The majority of examples in popular culture that that speak to anger usually illustrated as terrible or overwhelming, et cetera. And of course, so many of us have experienced that kind of anger from other. And so there is a lot of fear around that. And then the result is that we try to over accommodate instead of making requests or setting boundaries.

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Or

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we try to cover up our own anger at a situation by over giving. We try to cover up our own anger or frustration, by over giving, because we've got that and shadow are not willing to look at the fact that we are really angry or worried of coming off as a prey. And so then we over get,

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or don't uphold the boundary.

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Does this show up any of this show up for you? And how does that show up? So there's a lot of deeper work to do around this. And as I said, like we, as we continue on, we'll definitely be looking at it. But for now. I want to offer the archetype of the warrior as an antidote to issues with boundaries, the archetypal energy of the warrior. And if this resonates for you, I invite you to connect into this archetypal energy. So I think of the ideal warrior, not worrier, worrying warrior, as one who respects themselves and others enough

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to know

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what their boundaries are, and to uphold them. The Warrior is one who isn't aggressive, but who states the boundary and upholds it cleanly. Without shame, without manipulation. The Warrior is one who trusts themselves and others enough to have clear communication.

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Even if, at first there's resistance

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more confusion and or pushback?

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And I always think

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of the warrior poses in yoga, and like, why are they called warrior poses. And to me, all of those poses, they're about setting boundaries, like, this is the boundary here, not gonna like obnoxious in your face way. But this is what feels right for me. And I am up holding that All right, let's pause here for a moment. What's feeling important? And or exciting to you about all of this? What are you seeing? Who wants to share?

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I just want to say I'm very excited about showing up in these ways, you know, I feel I feel that I have them and I've cultivated them over the years. But, but but now to put it into practice, I feel like I can do it. But when you're being paid, there's a, there's something about receiving money for your, you know what I mean? And then to stick with that, I mean, I can do it with friends and with my community and just to where I am in the world. But now, when you're showing up, and you're paying me money, and I'm receiving money from you for my work and to support you, then it's Did you know what I mean? It's like, I'm

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so glad that's coming up. So I feel like there's a little place, ya know, I'm so glad that you're speaking into this. I feel like it's exposing a belief for you Gaia. And probably some other people have it as well. Of, if you're paying me, I don't get to have boundaries. Right? And so yeah, so well, right, like, good that that's we can like see that, that there's awareness being created on that, because that's probably silently impacting so much in your business and in your client work, you know, without you even realizing it. And so, if it, if this resonates, I want to invite you to do a little bit of a homework assignment. Some journaling, and I want you to start with the following journaling prompt. Just because I'm being paid doesn't mean I can't have boundaries

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that respect me.

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And then just do some freeform writing on that. Go deeper there. How does that feel?

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I love it. Just because I'm being paid doesn't mean I can't set boundaries. Is that what you said? I can't have? I can have Yeah.

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And if you want to include that are healthy for me or whatever it

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is. Is very, very good. Thank you. Good. Anita.

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First, I want to say call, it's interesting that the session about systems and protocols goes so deep into the shadows, I didn't expect this. And now I also see before I said that I see it more in connection with my partner. But now I also see it in connection with my clients were over giving my time and where I feel over responsible. And I'm starting to realize that by honoring the boundaries, I can give so much to those clients with whom I go over time. It's like, I can give them something in kind of therapeutic way. But I first have to do it to myself through facing those shadows that are coming up in today's session. So thank you big time. Yeah,

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you're so awesome. I'm so glad all that's coming through. Natalie.

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Yeah, it's just interesting to like observe that even within your client I'd roster like my client roster, how I can show up actually differently depending on my sense of qualification, let's put it that way. And so the client I'm talking about who is paying me late, is the one client I felt most intimidated to work with initially, initially. And I'm realizing that that didn't, because I felt she was like,

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had all the things that are good enough saying, Yeah,

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I lose, like, I don't know what I can do for you. And, and she's invested so much in me. And I think that's the part where this conflict is coming up because of that part that still feels none that I know the work we've done. And it's powerful, but it's like that, that feeling of am I still giving her what she needs? Given me? Like, am I enough for her is what's not making me say something about her paying up late payments, even though normally I think I would have said something by now. You know what I mean? So it's like, it's almost like, understanding the nuances of even with with with all our clients, we may actually show up differently, depending on how we feel about our competency or qualification.

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Yeah, 100% and then impacts this. So yes, so based on what you're saying, Natalie, if you want to take on this homework assignment, I would make a list just a whole laundry list of all of the ways that you are showing up with so much value in the container and the relationship with that client. Big little, like, all the ways that you are showing up with value, but also honoring your end of the agreement in terms of what you said you were gonna bring and show up with.

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Thank you. Yeah, good.

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Thank you, Nina saying in the chat, I often come back to the freedom and agency that boundaries could and would give to me in the people I interact with. Yes. And I also see how challenging it is to hold that accountability for myself and others in the situations.

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Absolutely. Yes.

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Julie's saying I'm thinking of a number of experiences and situations over the past several years, where I felt really proud of my courage. Even if I was shaking, I get that in confronting people when I felt my boundaries have been compromised or disrespected. Beautiful. Yeah.

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Carmen I'm having a bit of a hard time. I'm feeling very triggered in a way. Um I have I haven't had healthy I haven't had healthy boundaries modeled in a way that felt good for me. Yeah. And a lot of the teachers that I worked with and that I have studied with justify them with the spiritual offering that is the practice that I do.

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And that created safety for me in the way that didn't allow that shadow to come forward. And it's very hard to face it and it's very hard to see it. Yes. Like I'm listening to this whole call and I'm sitting with a little anxiety but I'm like, Okay, let's make this anxiety into excitement.

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Like Gaia was saying, and

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there is just so much pain attached to it. And I deflect that pain on others as well. Yeah, it's

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so deep. It is and I'm so glad you're sharing and I want to acknowledge Carmen that like you didn't run away from this call. Like Love log off and that you're like showing up now and sharing I think it says so much about even though you feel triggered, it actually says so much about your readiness to look at these pieces. And your capacity to look at these pieces. Because or else you would have been out the door it would be so easy. And so first I just like really want to honor that. And I want to remind you that you can take it piece by piece. You don't have to like tackle the whole thing at once. And with each piece you get to regulate and get comfortable with that. And you know how because that is your work right? And Then you look at the next piece, and you get to regulate and get more comfortable with that. So if there was one next, like little chunk, they will have all the things that are coming up like now we say, We're gonna like put those, they all came up. And that's great. We're going to put those aside and we're just going to like, take one of them to work on over the next week or two, what what piece is feeling important to work on

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next time? Yeah.

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How come? Why is that important?

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Is the one piece where I feel resentment? Yeah, after having spent so much time with a client, and it's understandable, like some of these people I've been working with for 10 years, and the relationships that we have built, have a level of intimacy that creates that safety to talk about my cousin and talk about my uncle and talk about my mom and this dream that I had. And that memory that came up. And that's great and helpful and awesome. But at the same time as much as I can hold information for that, that is not part of what the work that we're doing.

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That's right. That's right. Yes. So hey, if this resonates, here is a place that I think is on an inner level, that's a good place to start, is with maybe this prompt, just because we have a long standing relationship and an intimate one.

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Does it mean that I have to give away my time.

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And

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just maybe journal from that place? Just see what more wants to come from there. And tell me if I'm getting this right, Carmen is I'm hearing you it feels like a piece of this as this has been one of your ways of loving.

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Yeah. And so this this is about it. That's it's

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a huge paradigm shift, right and take it in chunks to love in different ways and in ways that honor you. Also.

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It's courageous work. And I'm really, really glad that you're up for it. Just in pieces and in persons. I think another thing that might help is to do some journaling on turning, turning this and say like, Would you want someone to be over giving to you because they think that's how to love you. You know, when do you want someone to feel resentful, and they're over giving and just like your thoughts on that

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as well.

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I know a lot of emotion is coming up. Are you? You feeling okay, or is there something else that you want to share?

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If there is I don't know. I

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can just

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there is a deep point

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there that.

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Yeah, yeah. They're going to speak it just doesn't have a voice yet.

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Yeah, I hear that. I feel like it's coming. I really do. Let's just take a moment. And just with your eyes open and I know you're so good at this Carmen find that place inside of you that trust

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that just trust that no.

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We're in your body. Are you holding that today? The part of yourself that trusts that gnomes? They told me yeah, what does it feel like in your tummy? It's warm. And cozy. Yeah. So lean into that feeling. Just be with that. With that knowing and that trusting and that warmth and that cozy. Let that be your anchor right now.

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Lean into that. Yeah. Thank you. Thank you. Okay, So

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last piece I want to make sure I mentioned for today client care is another part of the container and the relationship. So our container with our clients is not just what gets said and spoken and shared and worked on in our sessions, but how we communicate or how our teams communicate with our clients, in between sessions on logistics pieces, we call that client care. Are we answering quite logistical questions and timely manners? Are we following up on things that we said we would share with them? Or send them in between sessions? Did they ask for a recording? And we said we would send it and then did we actually send it those client care pieces are not just separate pieces outside of the container, they make up the energy and the part and parcel of that container. And whether you're doing it yourself, or if you're like me, and you have a team member, that's a client care coordinator. The energy of the logistical conversations is just important and logistical emails is just important is the energy you bring into your client sessions.

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And you want

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the energy of logistics to match your energy and the energy that you bring into your client sessions. And so like for example, a lot of you have communicated with Thalia, she's totally versed in the energy of my business and the energy of me, and what the energy that I bring to clients, right? And then that comes through in her communication. So as an example, she does my scheduling for my one on one clients. And if someone reaches out and they need to reschedule, she doesn't just write back like, okay, here are some times she writes back, I'm so glad that you reached out that everything is okay, I'm very happy to reschedule here are some times right like that energy is so important in the logistics. Okay, so in our last minute left, again, you're gonna have lots of different templates, for you in the member center, don't tackle all of them at once, it's gonna be overwhelming, it's not gonna work. Pick one, what is the one next template that you either want to create, or if you already have it created in your business that you want to level up and work on it, maybe it's a scheduling email, maybe

it's a contract, whatever it is, and just work piece by piece. If you want to go deeper with some of the inner pieces, I want to invite you to either what I was suggesting, for some folks just do some journaling on the beliefs that are coming up. That's one option. Or another option is I want to invite you to connect archetypal Lee with your inner warrior. And connect into the energy of that healthy warrior that I was describing. And then channel a letter from the voice of the war, the healthy warrior to you, telling you what they want you to know. And before you hop off the call today, please just take a moment and write down what is your big takeaway from our call? What is the biggest thing that you're taking away? And I'd love for you to share it in the chat. We're officially done if you have to go. But also, I can hang on for another couple of minutes if anybody has any questions or last words. Kelsey?

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Yeah, hi. Can you guess my sound working? Yeah, sure. Um, yeah. So what's been coming up on this theme for me, what I'm noticing is, I have a tendency to I feel like my boundaries are good until I get to the end of a session and then I want to say like, Okay, let me do XY and Z for you in between sessions. Like, I'll create this assignment. And I'm even noticed See it in terms of how often I'm scheduling calls, or I have scheduled calls, I feel like I'm in a process of moving this paradigm of like, it has to be weekly to like, I think I'm better at bi weekly. But it's, I mean, I think it just plays into the same themes. But I'm curious if you have any ideas about that, specifically, it's like, at the end of a session, I want to say like, I want to commit to all these things, and I'm not aware of my capacity in that moment. Is that me just being like, I am guessing if I, you know, because I know myself, it's probably like, I'm like, Oh, I'm worried about how this session went? Am I good enough? Let me give some extra value, because that'll make up for it.

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Yeah, yeah, good. So I'm glad you're seeing and calling yourself out on what it is. So there's some like inner and outer things you can do. So one is I would go deeper into that fear and that concern and journal on it and just like really be with it, right, like, can confront it and do that. And also similar to what I was sharing with Natalie, if you think it's helpful, write down all of the ways you're bringing value, and you are upholding what your responsibilities are in your client containers, really see it in black and white for yourself on the paper, name, all the things, that's gonna be a process, right, so that, so that's not going to change it all overnight. But I want you to start working with that. And then as kind of like a guard rail, as you get to the other side of that, I would recommend, like having some post its around your desk, around your house, wherever you are on client sessions, and be like, do not promise anything at the end of this session, Kelly,

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please

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have those reminders. And also maybe have a little ritual for yourself two minutes before you get on a call with a client, come back to the it's come back and say like, I know that it is not an honoring of me, or my client to make promises to do more work at the end of this session, and I'm making a sacred vow that I'm not going to do that in a session. And so kind of give yourself some of those guardrails as you work with them good enough notice, how does that feel?

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Yeah, that feels really good. I like the idea of just having those reminders, too. Because now that I'm aware of the pattern, I can work on shifting it and it's gonna, you know, this, this, when we cross our boundaries, like even saying, you know, it creates resentment, which is something I've had a huge like, I feel like that's one of my biggest things I've been working with. And like, kind of relaunching My business is like, how do I create, even through curriculum? Like, how do I create this program to not make me resentful by the end of it? Because I did too much more than want to do?

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Yeah, and the answer is to really be clear on your boundaries. And

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yeah, and look at and be, for me, it's also about being realistic, about what else I have going on, and how that actually plays out. It's like, I'm really good at scheduling out my day, and putting everything on paper, but then like, actually, I don't have the energy to match everything I scheduled for myself sometimes so. So that's such

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a good knowing too. And I would, if you can, after you've scheduled out your day, I'd actually cut 20%. Now, I would just be like, what's 20% of the things that I can cut out of this? Because I know from history,

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that this is how I do it. Yeah, yeah. I like this. Yeah, it sounds like I have a couple of avenues to kind of practice with myself of arranging things back in. That feels really good. Yeah. Thank you.

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You're welcome. So

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glad you have

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anyone need anything else before we wrap for today? All right, sending you all lots of love. I'll talk to you soon. I

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thank you. You're welcome.