

Sacred Depths

Introduction and Energetics of Coaching





Pre-Training Check-in

Managing Your Resistance

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Some thoughts you may be thinking:

- What was I thinking when I signed up for this?
- Am I really going to have the time for this?
- This is too advanced or too simple for me
- What if this doesn't work for me and I'm not going to get what I need here?

Actions that point to resistance

- *Not listening to the calls*
- Not catching up when you miss calls
- Not doing the homework, not participating in ways you know you want to participate



The Energetics of a Powerful Coaching Relationship

It's important to cultivate the powerful energetics of being a coach before anything else because it is the foundation of your coaching.



Understanding Energetics

 Powerful energetics of being a coach is about you, as the practitioner, setting the stage for having the most transformative and successful client relationship possible

- Energetics are about you understanding that a strong relationship with your clients is the basis of all you do together.
- True transformation happens in relationship, specifically your relationship with your client.
- What changes people is your energy and your presence as the practitioner.
- Your energy and how you direct your energy in coaching sessions as well as any interactions in-between coaching sessions is critical.
- How you as the practitioner shows up is at the heart of it all. It is what co-creates change for the client.

The relationship between you and your clients is referred to as the container. The container is where you deliver your how-to's and nuts and bolts information.

Energy follows Energy

- If you are not embodying the energetics of a transformational coach, your client feels it whether they're conscious of it or not.
- If you come to the coaching relationship with confidence in yourself, your client is more likely to have confidence in you and your work together.
- If you come to the coaching relationship confident that your client can succeed, then they are going to be more confident that they can succeed.

- If you come to the relationship with unconditional love and acceptance for your client's
 imperfections (and your own), then they'll be able to have more love and acceptance of their own
 imperfections.
- If come to the relationship not freaking out when there are obstacles and instead trusting that obstacles can be worked through your client will be more patient when obstacles show up. And your client is going to be able to trust that they can get through those obstacles with your support.

8 Important Dynamics

The foundation of energetics is vital because it allows you to honestly look at and course correct any misaligned inner dynamics, fears, perspectives, or limiting beliefs that are going on for you as the practitioner.

Working on those inner dynamics helps you as the practitioner be more clear, more grounded and much more in your zone of genius and leadership with your clients.

When you put the powerful energetics of being a coach in place, you discover that your relationships with your clients will contain the 8 most important dynamics that you need for a successful client relationship.



What is your brand of resistance right now? No judgment or beating yourself about it				
What's the fear behind the resistance?				
What's the part of you, or what pattern/person or idea is at risk if you were to really achieve your goal for this training?				
What is it you want to commit to for this program? Write a sacred commitment to yourself?				



Equalizing the Playing Field Resource Sheet

You and your client have different roles but there is no person in the coaching relationship who is better than the other or more powerful than the other.

Importance of leveling the playing field

- When you level the playing field, you see both you and your client as able, as mutually worthy of respect.
- Trust is created when the playing field is equalized. It is also where respect gets started.
- When there's an equal playing field, you've created an environment for true partnership to happen.
- If you aren't conscious of it and don't actively work to equalize the playing field, it's very easy to fall into the trap of not owning your brilliance or your expertise or not seeing yourself as smart enough or intuitive enough or [fill in the blank] enough. When this happens, you start seeing client as better than you or as smarter than you.
- The other way this shows up is when you come believing somewhere inside of you that your client isn't as good as you.

An equal playing field in the coaching relationship means you, as the coach, are approaching the relationship as if you and your client are two equal partners.

In either scenario – approaching the coaching relationship as either you or the client are less than - you're setting yourself up for having a hard time helping client in the way you want to help them. You are energetically creating an unbalanced relationship. One that's about fear or shame or miscommunication instead of alignment, openness, and an equal meeting of the minds.



Equalizing the Playing Field Worksheet

Here are some exercises and assignments to help you deepen the work we did on the Energetics of a Powerful Coaching Relationship (and all relationships!):

1. Fully Knowing and Believing that Your Clients are Whole and Complete

- Pick a particular client or person in your life that you know you need to step into this belief with even more.
- Start with the prompt "[Insert person's name] is whole and complete exactly as they are." Write for 5 minutes defending that statement no stopping, no editing, just keep writing.
- You can do this journaling exercise just once, or multiple times throughout the week (or month) to keep it top of mind and energy.

2. Fully Knowing & Believing that YOU are Whole & Complete

- Journaling Question #1: What did you parents, family, teachers and culture teach you (or not teach you) about being whole & complete exactly as you are?
- Journaling Question #2: Start with the prompt "I am whole and complete exactly as I am." Write for 5 minutes defending that statement no stopping, no editing, just keep writing.
- I recommend doing this journaling exercise at least a couple of times over the next week or two.

3. You Don't Need to Be Anything but Yourself for Your Clients & Coaching Sessions

- Even when we intellectually "know" this Truth, because of our programming and patterning, we can forget it pretty easily when we are with clients, or on sales calls, or marketing.
- To go deeper into this principle, journal on the following questions:
 - > When you show up for clients (or imagine doing so), who are you "trying" to be (instead of simply being who you are)?
 - > Why? Where did you learn you "need" to be those things?
 - > Instead of trying to be someone or something you're not, which of your innate qualities and learned wisdom do you want to bring fully present when you're with clients? Why?

4. To Keep the Playing Field Equal, Don't Take Over-Responsibility for Your Clients

- Where are the places you've been taking over-responsibility for your clients (or for people in your professional or personal life)?
- Why are you taking over-responsibility in those areas? (In other words, what beliefs are yourself or others are you holding that activate you to take over-responsibility?)
- What would aligned responsibility look like in these areas?

5. If You Are Working With Clients, Do A Client Inventory Around Energetics

• For each client, write out the beliefs or fears that you have about that client or about you in relationship to that client.

Clues the playing field is not equalized

- 1. You feel nervous or inadequate before, during, or after client interactions
- 2. You are not totally honest in communication with client. Not calling them out on things they're ready to hear or not making certain suggestions to them.
- 3. If you focus a lot more on your own needs or concerns or fears in your interactions with clients instead of focusing in on clients. If you're making it more about you than the client.
- 4. If you feel drained by the client relationship.
- 5. If you find yourself consistently concerned your client isn't going to succeed
- 6. If you are doing way more than you need to for the client.

How to Equalize the Playing Field

- 1. Really know your clients are whole and complete exactly as they are.
 - There is no need to fix your client in anyway.
 - The moment you approach the coaching relationship as if you need to fix anyone or their problems, it is no longer equal and won't be as effective.
 - Give unconditional love, respect, and acceptance to your clients and feel how valuable your client is exactly as they are.

Journal Prompts

- > Where in your relationships are you making the client (or friend/family member/colleague) less than you?
- > What are the judgments or assumptions you make about your clients? Get as specific as possible.
- > Where have you been feeling like your client (or friend/family member/colleague) are less than whole and complete?
- > Whatever you've identified, how is this impacting the relationship? (e.g., are you are overworking as s result? Not really being totally honest?
- > Reframe the assumptions you've made about the client. For example, "Jack will not stick to a food plan for more than two days" is an assumption. You can reframe it to, "It is challenging for Jack to stick to a food plan, but he's asked for my support for a reason. I sense with encouragement, accountability, and food planning he'll be able to do it."
- 2. Deeply know YOU are whole and complete exactly as you are
 - As soon as you approach client interactions from a place of not knowing you are whole and complete as you are things start to go off kilter.

<u>Iournal Prompts</u>

- > Look at your current client relationships, where are the places where you're making yourself less than the other?
- > What are the judgments that you're making about yourself? Get as specific as you can.
- > Where are you feeling like you're not smart enough or skilled enough or not successful?

- > How is impacting the relationship?
- > How can you reframe this judgment of yourself?
- 3. Remember, you are not perfect, and neither is your client
 - Perfectionism or striving for it causes you to forget your clients are whole and complete.
 - It also causes you to expect more from yourself than is possible or even helpful.
- 4. Sometimes coaches have a mistaken belief that you need to have all the answers
 - You do not have to all the answers or all the solutions.
 - As soon you think you have to have all the answer you go into fix it mode, which is unhelpful for the client in the long run.
- 5. You don't need to be anything but yourself
 - You don't need to be whatever it is you think a coach is supposed to be.
 - Be YOU!
- 6. You are not WHOLLY responsible for anyone's growth or results this is a partnership
 - What can mess coaches up is thinking it is your job to bring results for your clients.
 - As soon as you go there, it is no longer an equal playing field.



Energetics of Coaching Self-Quiz

1.	What are Energetics & why are they important in coaching work with clients?				
2.	What's another name for the relationship with your client?				
3.	Name the 8 dynamics needed for a successful client relationship				
4.	What does "energy follows energy" mean in the coaching container?				
5.	What does it mean to level the playing field in a coaching relationship?				

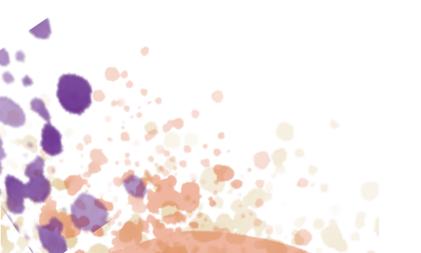
6.	is created when the playing field is equalized.
7.	What does it mean to see your client as whole and complete?
8.	T/F It's critical that as you coach you have all the answers and all the solutions to your client's problems. Or be able to get them the answers.

1) Powerful Energetics of Being a Coach are about YOU setting the stage to have the most transformative & successful client relationships possible. The Energetics are about how YOU as the coach/practitioner show up for your clients — the energy you show up with and the energy that gets created in the container. The energetics are about how you understand that a strong relationship with your client is the basis of all you do together — because if your relationship isn't strong, it doesn't matter how amazing your questioning or strategizing skills are, they are going to fall flat. 2) The Coaching Container 3) Mutual trust, mutual respect, partnership, space for creativity, clear and honest communication, healthy boundaries, belief in highest vision for client, integrity.

4) The energy that you bring to the container leads the energy that a client feels. If you bring the energy of confidence in your clients, your client is more likely to feel confidence in themselves, for example. If you are not embodying the energetics of a transformational coach, your client feels. If you bring the relationship as if you and your client in any way. Give unconditional love, respect, Vulnerability (and more!) 7) There is no need to fix your client in any way. Give unconditional love, respect, and acceptance to your client. Feel how onlumble and able they are. 8) False - You do not have to all the answers or all the solutions.

Energetics of the Coaching Relationship

Creating a powerful, effective, and transformative coaching experience for your clients starts with a powerful, healthy, and aligned coaching relationship



Energetics I

Energetics

Understanding Energetics

- The energetics are about how we, as the PRACTIONER, show up
- Energetics are at the heart of the transformational work



Coaching Container

- The RELATIONSHIP between you and your client
- The phrase 'container' is a linguistic tool to bring attention to the 'doing' of creating & holding the space for the relationship to thrive

Energy Follows Energy

- Embody the energetics of a transformational coach
- Step into the container with the energy of transformation (ie: love, acceptance, confidence, trust in the unfolding)

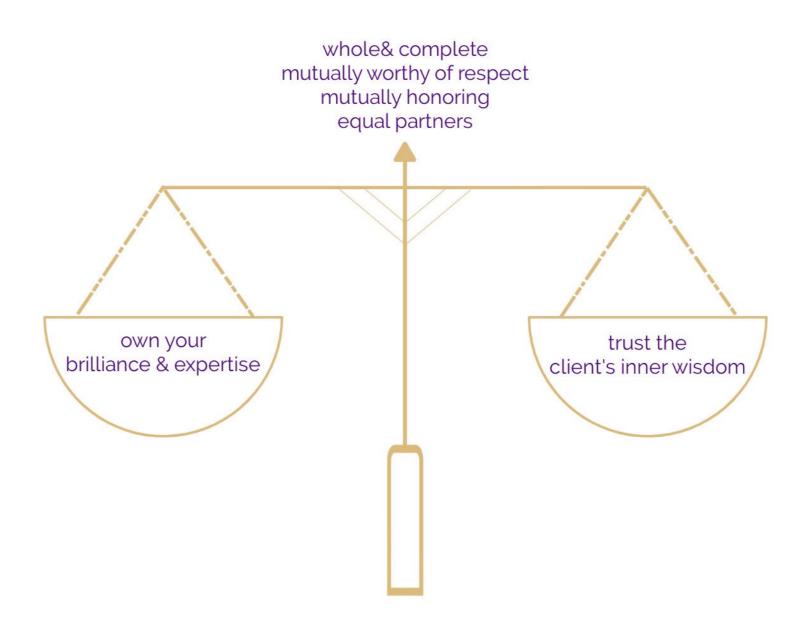


Energetics I

8 Foundational Dynamics

- Mutual Trust
- 2. Mutual Respect
- 3. Partnership
- 4. Space for Creativity
- 5. Clear and Honest Communication
- 6. Healthy Boundaries
- 7. Belief in Highest Vision for Client
- 8. Integrity

Level Playing Field



Sacred Depths

Deep Listening Skills 1





The Coaching Container Resource Sheet



In order to create a strong coaching relationship, you must create a strong coaching container. The container holds the coaching work together.



Purpose of the Container

- Every client relationship, retreat, coaching session, or workshop you lead needs a container
- The container is not something you see. It holds the coaching work together. It helps you and your client come together as a unified whole. Helps you both stay engaged, and it helps you both not physically, emotionally, mentally, or spiritually drift and disconnect.
- Containers keep your clients connected to you during the session and also in-between sessions.
- Tight containers create a sense of trust and allow clients to be fully present, engaged, and vulnerable. They create the environment for the highest level of transformation and results.
- A leaky container in coaching looks like disengagement, confusion, or session falling flat.
- Think of the container as a loving circle being held around you and your client(s), so you can do powerful work together and it is contained in a safe way.

Creating A Strong Coaching Container

- 1. Equalize the playing field
 - See Playing Field Resource Sheet
- 2. Prepare yourself and hold the container. Start paving the way ahead of the sessions.
 - Emails sent ahead of first session are part of setting the container.
 - Setting clear ground rules and protocols for coaching and then sticking to those rules
 - The more you and the client can agree on the terms of the coaching what the coaching will look like the tighter the container will be.



Checklist for Establishing a Strong Start To Your Coaching Relationship

Just like building a house, there are certain foundational processes that you will want to put in place at the beginning of your coaching relationship or each coaching session in order to get off to a strong start that will create strength, endurance, and a fabulous coaching experience.

Here is a checklist of things to put in place:

- ✓ Coaching Contact
- ✓ Welcome Questionnaire: create a client questionnaire that will help you learn any necessary background information from your client, as well as give your client an opportunity to assess and state where s/he is, who s/he is, and what she wants to achieve through the coaching relationship.
- ✓ Establish Your Clients Coaching Goals: It's so important to be 100% clear on your client's goals and vision at the start of your coaching relationship and then to check in on how those goals may or may not be changing on a regular basis. This helps you stay focused on your client's agenda, and know when you're getting off-track or distracted. Some great ways to establish client coaching goals are:
 - 1) include a question about it on your welcome questionnaire
 - 2) take the time to discuss goals in your first meeting, and
 - 3) check on goals regularly during sessions.
- ✓ Include a Special "Kickoff Conversation": I highly recommend adding a special "kickoff session" at the start of your coaching sessions. The purpose of this special session is to have the time and space to establish trust, to get super clear on the client's goals and visions, to also get clear on the client's obstacles and sabotaging techniques or patterns, to learn more about the "who" of your client, and to establish any important protocols or procedures for your work together.

- ✓ Start Each Session Powerfully and with Intention: How you start each coaching conversation can make a huge difference in the power, effectiveness, clarity, and progress of each call. Don't jump right in to your coaching any current situations, but instead take the time at the start of each session to create an environment of presence and establish focus and goals for that session. I often start coaching calls with a short meditation that allows clients to become more present to themselves, their bodies, and the call, and then ask a question or two that establishes the focus of the call. For example, you can ask questions like: "What would you like to focus on for today's call?", "What are your intentions for our time together today?", or "What would you like to walk away from this session with?"
- ✓ Focus Report/Progress Report: You may find it very helpful to create a short progress report that your client can fill out and return to you before each coaching session. The progress report can include questions that help you get a sense of your client's experience since you last spoke. For example: what your client has accomplished, where s/he has gotten stuck, what s/he has learned, and where s/he wants to focus next. A progress report is also a great supplemental tool that helps your client assess their forward movement and locate where they are on a regular basis.

3. Be clear about protocols – this creates safety

- How long are coaching sessions?
- What are your responsibilities as the coach, as well as what are your client's?
- When are sessions scheduled?
- Be clear on HOW sessions are scheduled.
- Be clear on payments how much and when they will be made

4. Every coaching session is its own container

- You can have clients fill out as pre-session accountability or prep form, where questions are asked to help prepare client for session.
- Start each session by getting clear on the client's intentions for the call. Clarity on intentions and what the client would like to receive will allow the session to flow better and results to happen easier.
- End each session by supporting the client to integrate what came through in the session. A great way to do this is to ask about takeaways, and to give follow-up homework or action steps.

5. The entire coaching cycle is also its own container

- Consider having a kick-off call, during which you set intentions for entire cycle.
- Have a closing call for integration
- Possibly a mid-point call to assess progress
- Be clear how quickly will respond to emails.

An ounce of pre-framing prevents a pound of reframing.



Foundational Principles of Deep Listening



When you, as the coach, can listen masterfully, you then hold in your hands the key to creating results through your coaching.



Principles to be A Masterful Listener

1. Everyone wants to be seen, heard and loved

- When client feels seen, heard, and loved they feel validated and naturally also feel more confident, more accepting of themselves, more courageous, more valued, and more willing/able to take action.
- When you focus too hard on being a good coach, you inevitably stop listening. And when you stop listening, you've detracted from the mutual love and respect of the coaching relationship.
- What usually gets in the way of client feeling seen, heard and loved is 100% related to the unequal playing field. If you're focused on your flaws or your client's flaws it will be hard to see, hear, and love your client.

Deeper Dive

- > On a scale from 1-10, how well are you doing at helping others feel seen, heard, and loved.
- > What stops you from being a wholehearted 10 in this area? What keeps you from being able to fully see, hear, and love others?
- > How has YOUR need to be seen, heard and loved by a client shown up for you?

2. Be truly present in every moment

- This means showing up fully. It means bringing full mind, attention, focus, heart, spirit, and soul to the session.
- When you're not fully present, you're not fully your best.
- Not allowing distractions like technology, or thoughts about rest of your day, or anxiety about performance get in the way of you showing up fully.
- Energy follows energy. If you're fully present, the client is much more likely to be fully present. If you're not, then the client is also not likely to be fully present.



Deep Listening Worksheet + Going Further with Clients

1) Powerful Coaching Relationships Help Clients Feel Seen, Heard & Loved

- What are some things you do to help clients (or others) feel seen, heard and loved?
- What are some things you do that stand in the way of clients feeling seen, heard and loved?
- How well do the people around you (past and present) help YOU feel seen, heard and loved?
- What are some things that others do that help you feel seen, heard and loved?
- Make a list of your client roster: what's one thing for each client that you could go further in helping them feel seen & heard?

2) Your Intuition is One of Your Greatest Assets as a Coach

I invite you to begin becoming more aware of and tracking your intuition when it comes to sensing how others are feeling and what they are believing.

The easiest way to do this is to pick 2-3 conversations you have every day – with clients or others – and after the conversation, write down what you sense about the other person – how they feel, what they think, what they know.

3) Practice Curiosity in Your Everyday Life

Curiosity will be one of your main strengths when it comes to formulating powerful questions that create breakthroughs for your clients.

I invite you to practice curiosity every day and cultivate that muscle for yourself. Become curious about the people you speak with, the things you read, your environment.

Allow yourself to explore. The best way to do this is to keep a log for a week of things you are curious about throughout your daily conversations.

4) How can you tighten up your client containers?

With your clients, work on setting intentions at the beginning of session and takeaways at the end.

After client sessions, reflect and answer: What went really well? What would I like to do differently next time? What is my inner wisdom telling me about this client and about what they need next?

- Distraction of you're not good enough or session is not going well enough leads to worry and stress, and you start to question yourself more. When you're feeling off because you're questioning yourself, there's no way you can remain fully present to client.
- Being present with client will actually help override the self-doubt, at least in that moment.
- Bring in any mindfulness or presence practices you can use to stay present.

Tips for Staying Present

- Do a grounding meditation before getting on a client call
- Get grounded at beginning of the workday. Take time to get present before starting calls. This can have a lasting effect throughout the day.
- In the morning, before client sessions, think about clients you'll be working with that day. Energetically send love and set intentions for how you want to show up in the session.
- Turn off distractions email, social media, and notifications.
- Tace care of body
- Don't read emails that might trigger you.
- Continue to bring your focus back to your client.

Deeper Dive

- > In what ways do you distract yourself?
- > What tends to get in the way of you being fully present?

3. Listen to yourself as well as your client

- Listening is a dance between listening to your client and listening to your own internal wisdom response based on what client is saying.
- It's checking in with your inner wisdom to hear beyond what the client is saying with their words.

Deeper Dive

- > How does your intuition or inner wisdom give you guidance when you are listening?
- > Can you recall a time when you followed your inner wisdom in a conversation with a client or friend/family member? What happened?

Post-session reflections can help build your inner wisdom muscle:

- What went well?
- What would I like to do differently next time?
- What is my inner wisdom telling me about this client that she may not even know about herself yet?

4. Be curious

- Things open up when you are curious. More solutions become available.
- Listening deeply to your client yields intuition or inner wisdom. Stay curious based on what you heard from client and what you heard from yourself.
- Your intuition is there to open you up to be curious in the most potent and powerful places of what the client is sharing with you.
- When your curiosity is activated, you don't simply take things client says for granted or at face value. Curiosity helps you listen underneath the surface.
- Curiosity helps you to be more fully present.

Deeper Dive

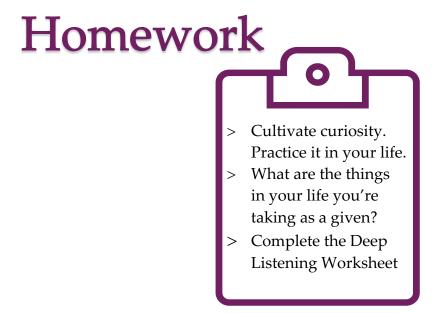
- > What is your relationship with curiosity? Do you lean into curiosity easily or is it harder for you?
- > What are the things in your life you're taking as a given?

5. Listen for the WHO

- As a coach you want to coach the WHAT based on the WHO
- A mistake some practitioners make is, for example, hearing a certain result a client wants to achieve and begin coaching towards that goal without considering where the client is and what else might be going on with the client. They coach the WHAT and not the WHO.
- Be sure to listen for where a client is when they start working with you.

Deeper Dive

- > What causes you to default to coaching only or primarily to the what rather than the who?
- > Where do you tend to apply a cookie cutter approach to coaching?





5 Principles

Foundational Principles to become a Masterful Listener



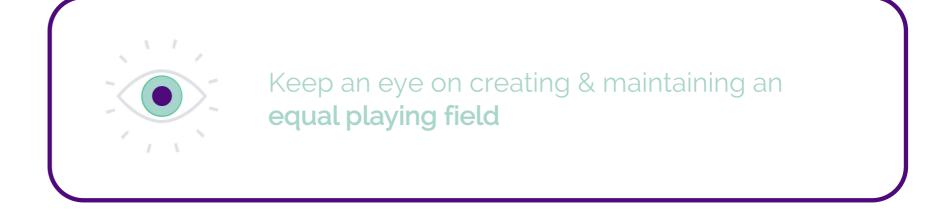
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Deep Listening I

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Coach the WHAT based on the WHO

Deep Listening I

5 Principles

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Sacred Depths

Deep Listening Skills 2





Filters & Biases Resource Sheet



Filters and biases can help you listen masterfully, or they can become a major obstacle to truly hearing what your client is saying.

You will never be able to fully hear what another person is saying, the layers beneath what they are saying, and the meaning behind their words, until you recognize that whenever you're listening to someone else, you come to the experience with all of your own filters and biases.

Your filters and biases are part of any conversation and any learning experience you may have.

What are Filters and Biases?

- Filters and biases are the sum of all the beliefs, perspectives, and understanding we have about the world. They are based on past experiences and our background.
- Filters and biases are deeply imbedded inside us and unless we do the work to become aware of our filters then generally, we are not aware of them.
- It's not that filters are bad or prevent you from being an amazing listener. Your filters have the power to help you understand the layers beneath the layers.
- Filters are powerful but only if they are checked.
- Filters can help us listen more effectively IF we are aware of them, and not take them for granted, which allows them to slip into our subconscious.
- When we take our filters for granted, we get blocked in our listening. We start making assumptions and we stop hearing our clients and the important details they are sharing.
- When we aren't aware of our own filters and/or our clients' filters, we also run the risk of coaching the WHAT without basing it on the WHO
- This is ultimately about seeing your client with full clarity and not through the distortions of your filters.
- Unchecked filters lead to unchecked biases

Becoming Aware of Filters

- 1. Do the Identifying Unproductive Listening Filters worksheet
- 2. Take note of client filters how do they see the world?
- 3. Activate highest level of empathy
- 4. Find a similar filter as your client to create a connection point. But check in to make sure you are getting it right.

Empathy is the action of understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experiences of another – past or present - without needing the feelings, thoughts, and experiences to be communicated in an explicit manner.

Journaling

- Think of a time when a filter helped you listen and understand well.
- Consider a time when communication with another person where you had a filter that wasn't checked, and it blocked you from really hearing the other person?
- Take a look to see how unchecked filters have led to unchecked biases.



A Checklist of Things to Listen For

I. Your Client's Presence

- ✓ Client's emotional state
- ✓ Silence
- ✓ Pacing
- ✓ Tone

II. Apparent Clues

- ✓ Match or mismatch between behavior, goals, and commitments
- ✓ What is motivating the client
- ✓ Client strengths
- ✓ Client wins and celebrations
- Client's obstacles and potential obstacles

III. Non-Apparent Clues

- ✓ Specific language and terms the client uses
- ✓ If something seems misplaced with the rest of the conversation
- ✓ What the client ISN'T saying
- ✓ Does the client process primarily visually, auditorily, or kinesthetically?

- ✓ Client's Essential Nature
- ✓ How connected the client feels to you as a coach
- Client's engagement with what (s)he's talking about
- ✓ Client's beliefs
- ✓ Who is influencing the client (who are they listening to or modeling)
- ✓ Shifting of goals and vision
- ✓ What inspired the client
- ✓ What the client is scared of
- ✓ Inconsistency between who you now your client to be and what they're saying
- ✓ If the client repeats anything
- ✓ What the client is becoming aware of
- ✓ Your own intuition and hunches

Assignment

On your next few client sessions (or conversations with others), see how many of these things you can listen for. The more you do this intentionally, then eventually the less you will have to think about it, and the more it will come organically and naturally to you.



Identifying Your Unproductive Listening Filters

An Unproductive Listening Filter is ANY assumption or held belief about anything you have acquired over the years that stands directly in your way of hearing the meaning, energy and truth in your client's words, voice, and posture. If you enter a coaching conversation with an unproductive listening filter, the filter will literally get in your way of hearing the full picture for your client. In order to engage in Soul-Centered Listening, you want to eliminate your unproductive listening filters. This is a 3-part process that includes:

1. Clarifying Your Unproductive Listening Filters

Take some time to clarify your unproductive listening filters by writing your filters down. You won't be able to be comprehensive with this, but it is helpful to clarify as much as possible. There are some of the most popular categories where people tend to hold filters:

- ® Religious background
- Economic background
- Geographic location
- Race
- Gender
- Age and aging
- Parent or no parent

- Family Relationships, connections and dynamics
- Health background
- Education background
- Employment background
- Cleanliness and Organization

2. Listening to Your Client's Truth, Background, Beliefs and Filters

For each client, ask yourself "What are this client's beliefs, filters, truth and background?" as you engage in the conversation. You can also ask yourself after the conversation or write out a chart of filters for each of your clients to practice identifying them. As you practice this concretely more and more, it will become second nature to you, and you'll be processing this information with much less effort.

3. Getting Clarification on What You Sense

Let your client know what you are hearing, and ask: "Am I getting this right? I'm hearing that....."



Soul-Centered Listening Practice Exercise

Client #1: "I left my career as a lawyer when I gave birth to my first child, and that was 7 years ago. Since then, I've happily been a stay-at-home mom, but the last few months, I've felt a little unsatisfied with my life. Being with the kids is fun and amazing, but there's something nudging me. When I think about going back to work, the thought of a law office repulses me. But am I really going to look for a new career at this point in my life? It's just been so long since I've been in the workforce, I don't even really remember how to use that part of my brain or be professional. Also, what if my kids need me at home? What will my other stay-at-home-mom friends think? Will my partner be amendable to doing laundry sometimes?"

What are you hearing?		
What are you NOT hearing?		
What are you curious about?		
Which of your filters do you want to check to make sure you don't bring assumptions or biases to		
your listening?		

Then everything in my life would change – I could graduate from my Masters program, get a job, have more time. But it's just like the Universe doesn't want me to finish this or something." What are you hearing? What are you NOT hearing? What are you curious about? Which of your filters do you want to check to make sure you don't bring assumptions or biases to your listening?

Client #2: "I've been working on my thesis for months now, and I'm in the homestretch. All I need to do is the last pass of edits. It's been sitting on my desk for 3 weeks now, and I still haven't done it. Every time I sit down to work on it, something else comes up — a phone call, an important email, I get hungry, etc. If I could only just get it done!

today to help me finish packing. At the last minute, she texted to tell me she'd be late. I waited. I just waited there, waiting for her to mess up, because I knew she would. She always does. And sure enough, she did. She just didn't show up. Ha! I knew it from the moment she told me she'd help out. So, she just didn't show up, and I just sat in my apartment overeating, and worrying that I'll never get fully packed for my move." What are you hearing? What are you NOT hearing? What are you curious about? Which of your filters do you want to check to make sure you don't bring assumptions or biases to your listening?

Client #3: "I'm fed up with my sister. My whole life, she's given me a hard time. It doesn't matter how nice I am to her, how much love I show her, what I do for her, she just always finds ways to insult me, to leave me hanging, to disappoint me. The latest disaster: I'm moving tomorrow. My sister promised me weeks ago that she'd come over

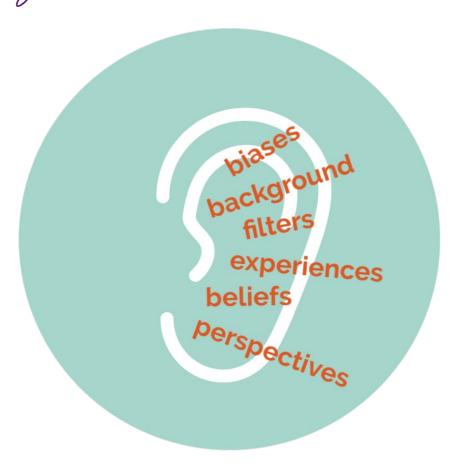




- Pick 3 of your filters, and for each one list out the biases and beliefs that you've acquired as a result of that filter
- Name 3 instances where you haven't been able to fully hear someone because you had an unchecked filter in place
- ® Name 1-2 instances where you haven't been fully seen or heard because the listener had unchecked filters in place
- Name 3 instances where your filters have helped you listen more efficiently and effectively

Filters & Biases

"We are not listening with clean ears unless we clean them first"



Risk: coaching the WHAT instead of the WHO

Awareness Of + Working WITH

- 1 Awareness of your Own Filters
- (2) Awareness of Client's Beliefs and Filters
- 3 Activate Empathy

Find a Similar Filter | Create a Connection Point "Am I getting that right?"



Listen For...



Client's Presence

ie: client's emotional state, pacing, tone



Apparent Clues

ie: client's strengths, motivations



Non-Apparent Clues

ie: what the client isn't saying



Deep Listening Self-Quiz

What are the 5 principles for being a ma	asterful listener?
As a practitioner, you coach the	based on the
T/F: When you focus too hard on being	a good coach, you inevitably stop listening
Explain why listening is not just about to yourself.	listening to your client but also about lister

(I) a. Everyone wants to be seen, heard, and loved b. Be truly present in every moment. c. Listen to yourself as well as your client. d. Be curious. e. Listen for the who. (2) The WHAT; the WHO (3) True (4) Listening in a coaching session is a dance between listening to your client and to your own inner wisdom response based on what the client is saying. This deep listening allows you to hear what the client is saying and what is under the surface that wants to come forward.

5.	What is a technique you can use to build your inner wisdom muscle?
•	helps you to be more fully present.
	What are filters and biases?
	What is the role of empathy in listening?

(5) A post session reflection, where you ask: what went well, what would I like to do differently next time, and what is my inner wisdom telling me about this client? (6) Curiosity (7) Filters and biases are the sum of all of the beliefs, perspectives, and understandings we have about the world. They are often deeply imbedded inside of us. (8) Empathy is essentially putting yourself in someone else's shoes. In coaching sessions, empathy is a tool to help you connect with what your client is experiencing even if you haven't had a similar experience yourself.

Sacred Depths

Creating Awareness Skills Part 1

APPLIED PRACTITIONER INSTITUTE



Creating Awareness Resource Sheet

Creating Awareness is the act of supporting your client to see, acknowledge or accept something about themselves or their situation they could not before.



Creating Awareness

- Allows client to embrace more deeply something about themselves that will help them to be more confident, clearer, or more open.
- Is a strategy that allows client to feel seen, heard, and loved more deeply.
- Can support clients to see blind spots, achievements, gaps, obstacles, inner answers, and truest desires.
- Can sometimes create a breakthrough in an instant.
- Being able to do this stems from being a masterful listener.
- If operating with unchecked filters, you cannot create awareness for your clients.
- When creating awareness, you want to create an environment where client can be as aware as possible about themselves or a situation before moving on to the strategizing portion of a session or coaching journey.
- If you don't create awareness there are too many things that can be in client's blind spot. There may also be more resistance or the strategy that is developed is out of alignment.

Ways to Create Awareness

- 1. Ask questions that illuminate truth
- 2. Reflecting the truth back to client
- 3. Via consulting sometimes client needs your expertise.
- 4. Acknowledging and honoring what is
- 5. Thru personal anecdote or storytelling
- 6. Using myth and metaphor

Creating awareness is a gift we give to clients.

Reflecting Truth – A Tool for Creating Awareness

Most of the time, you want to create awareness by asking really good questions. This allows the client to get the awareness on their own and they are able to take it in more deeply. Client can often own the awareness more if they say it first themselves.

Sometimes the awareness that wants to come forward is so deep in the client's blind spot or so deeply ignored by the client that questioning alone won't do the trick. In those moments, reflecting truth back may be what's needed.

Reflecting truth should not be used as the default. Much of the time questions is best.

How People Respond to Hearing Hard Truths

- Get it immediately, have a breakthrough, and able to integrate
- Get angry or defensive or go into denial
- Go into self-judgment, victimhood, or hopelessness
- Check out or get confused

Energetics of Reflecting Truth

- One of the biggest roadblocks for practitioners is fear that reflecting truth will hurt or harm the client or make the client angry or upset.
- Reflecting Truth requires bravery. It requires us to take a stand for a client.
 - You have to check your own filters and fears. Reflecting truth requires objectivity and resolve, love and compassion, and courage.
 - Requires practitioner to be comfortable holding space for someone who is uncomfortable. Being willing to sit in the shadows and not run away from their discomfort.

Journal Questions

- > What fears come up for you as you consider sharing truth with others, either clients or personally?
- > What fears come up as you consider sharing controversial opinions with others?
- > How often was the truth named in your family growing up?
- > How was the truth shared in your family? How has that impacted you?
- > Do you have experiences of being told a hard truth but having it delivered with love and compassion? If yes, what's important about that for you?
- > How do you take in, receive, and respond to feedback or hard truths that others share with you? Do you respond or do you react?
- > How do your family members take in, receive, and respond to feedback or hard truths that others share with you? Do you respond or do you react?
- > What comes up for you as you think about holding space for someone who is uncomfortable or in pain?
- > What would you need to believe in order to see your client(s) as resilient?



Reflecting the Truth Techniques (A Tool for Creating Awareness)



Reflecting truth is sharing directly with your client what you're seeing or sensing.



Most of the time you want to create awareness by asking breakthrough questions. However, sometimes reflecting the truth back may be more impactful.

How to Reflect the Truth

I. Preparation

Question to Keep Top of Mind: What is my client NOT seeing, accepting, or fully embracing that would create a shortcut to their growth or results?

- Almost always, ask enough questions first to see if the client can come to the awareness on their own, before moving on to Reflecting the Truth.
- Check in with your inner wisdom on whether or not the client is ready to hear the truth. (This is not a perfect science, but consider: Do they have a history of being defensive? What is their mood today?)
- Be willing to be wrong. Tell the client that it's okay if you are wrong and leave open the option to be wrong (delivery is key in this).
- Reconnect to your LOVE for your client and to the TRUST that they are whole and complete exactly as they are.
- Make sure you've got an Equal Playing Field. If it's skewed to where you think your client is better than you, you won't have the confidence and courage to share what you are seeing. If it's skewed to where you think you are better than your client, you run the risk of "Guru-ing" and disempowering them.

Strategy #1 - Slow and Steady

Ask Permission

Example: "There is something I'm noticing about what you're sharing that you may or may not be aware of. Would you be open to me sharing this with you?"

• Share the Truth that you are seeing.

Example: "I may not be getting this right, and I trust your inner wisdom, so you will let me know. I've noticed $X \dots$ am I getting that right?"

- > X= you tend to self-sabotage every time you have a success
- > X= you are such a confident person, but when it comes to networking it's like you lose all of your confidence
- Follow up with a deeper question about the topic

Example: Why do you think that happens?

Strategy #2 - Personal Anecdote

- Remember: Only use a Personal Anecdote if it's truly applicable.
- Ask Permission to Tell a Personal Anecdote

Example: "Your situation really reminds me of something similar that happened to me. May I share it with you? I think it would be beneficial for your learning here."

• Help Client Connect Your Personal Anecdote to Their Needs Example: "How might this relate to your situation? And if it doesn't, let me know! I may be off here."

Strategy #3 – The Question Zinger

- Introduce Language into Your Questioning that the Client Hasn't Used Yet. Example: The Client is working, working, all the time. Doesn't want to but works all the time anyway.
 - > Question: When did you become addicted to working?; or
 - > Question: So, when did you decide that you were going to *risk everything in your life*, even your health, for your work?

Strategy #4 - Bold & Beautiful

- Need a tight container for this, and to have a sense client can really handle it
- Being bold does not mean that love & total and utter respect isn't involved Energy matters a lot!

Example:

- > "My BS detector is going off right now...."
- > "I don't believe that...."
- > "You're hiding...."
- > "Really?....."

II. Pre-Framing

When you Pre-frame, you are already calling out the resistance or trigger before your client has a chance to go into resistance or get triggered . . . and it can be a very powerful tool in avoiding resistance and trigger -- or at the very least making your client AWARE of her reactions before they happen. It also signals to your client that their anger or reaction or whatever it is, is welcome in the container and that you and the container can handle it, that it's normal and that you can work through it together.

- 1. If you know that you're going to Reflect a Truth that has the potential to be hard, triggering, uncomfortable, or anger-inducing, Pre-frame it in Strategy #1 when you are Asking for Permission.
 - Example: "I'm noticing a pattern that I'd like to share with you. When I first mention it, it may have the potential to piss you off, but it feels important for us to look at together. Would you be open to me sharing this with you? . . . And if it pisses you off, just let me know!"; OR
 - "There's something I'm noticing about what you're sharing that you may not be aware of. Would you be open to me sharing it with you?" [Client says YES, and you say:] "Great, so it might sound odd or maybe even make you feel uncomfortable at first, but bear with me . . .".
- 2. Remember: "An ounce of PRE-FRAMING is worth a pound of REFRAMING!

III. Mirroring

This technique is used to reflect back simple truths. It is typically used after a client shares something significant or something with a lot of details. It is an elegant way to let your client feel seen, heard and loved, as well as create awareness. Sometimes your client will speak the truth but haven't fully taken it in. Mirroring gives them space and opportunity to take in their truths more deeply for themselves.

Here's language you can use for mirroring:

- "Let's pause here for a moment."

 This punctuates the flow and opens up the space for the truth that is being reflected.
- "This is what I'm hearing, and I want to make sure I'm getting it right." Slow down your pace and modulate your tone so the client can really take in what you are about to say.
- Reflect back important facts heard in all the details. Emphasize the most important parts back that need emphasis. You may use client's own language or to create awareness, you may insert new words or phrases the client hasn't used that will help reflect the truth.



At Home Work

With a client or in your personal life, experiment with reflecting a hard truth that you would not have shared before today's class. Don't be afraid to go deep.



Creating Awareness Reflecting The Truth Worksheet

- 1. Think about 5 people in your life that you care about (friends, family members, colleagues, clients, etc.).
 - a. For each person, consider what is a possible awareness or Truth you see that may be in their blind spot right now.
 - b. For each Truth that you see:
 - Check your filters to make sure you are seeing objectively.
 - On a scale of 1-10, how scary does it feel to consider sharing that awareness?
 - If there is fear, what do you fear might happen if you share the awareness?
 - How might this person benefit if you shared the awareness?
 - What would you need to shift inside of yourself to reflect this awareness to them?
 - Is there a Personal Anecdote that would be helpful or applicable for you to share with this person?

<u>Important note</u>: The point of this exercise is NOT to actually Reflect the Truth with these individuals (although you may choose to do so if it feels aligned). The point is to go through the discovery process outlined above.

2.	What are 3 Truths about YOURSELF that your own Inner Coach wants you to become aware of?
	become aware or:
	a.

c.

b.



"Masterful coaching isn't about knowing the truth but being able to hold space for the client's truth to emerge." Joanna Lindenbaum



Ways To Create Awareness

1) Ask Questions

4 Honoring What Is

² Reflecting Truth

5 Storytelling

- 3 Consulting, Facting
- 6 Myth & Metaphor

A question to ask yourself when creating awareness:

What is my client not seeing or fully embracing that would create a pathway to their results?

One of the Tools*: Reflecting Truth

Prior to Reflecting a Truth



Energetics

- Readiness
- Love
- Filters
- Willing To Be Wrong
- Equal Playing Field
- Permission

^{*}Note: Most of the time, we'll create awareness by asking really good questions

Creating Awareness I

How To Reflect Truth

I. Preparation

II. Pre-Framing

III. Mirroring



Strategy #1
Slow & Steady



Strategy #2
Personal Anecdote



Strategy #3
The Question Zinger



Strategy #4
Bold & Beautiful

Just because they said it, doesn't mean they've actually taken it in.

Sacred Depths

Creating Awareness Skills Part 2





Acknowledging & Honoring What Is

Honoring What Is means supporting a client to become aware of or to connect more deeply with what they're feeling and experiencing. Even and especially the crappy, not-so-savory things that happen in their life.



What Does Honoring Do?

- Helps client feel seen, heard, and loved.
- Deepens connection to you as the practitioner and the client becomes more willing to have a breakthrough.
- Allows client to see something they otherwise would not have seen.
- Gives client permission to acknowledge and honor their own experiences and feelings.
- They can metaphorically take a deep sigh of relief as a result of naming the thing, being with it in full honesty, not hiding from it, not ashamed of it, or having it in their blind spot.

Coaching is love in action in a professional setting. When we honor what is, we show love to our client and create an environment of love for them.

Examples:

- That must have been really frustrating
- That sounds really tough...
- I know you worked hard on that, and it makes perfect sense that you're disappointed...
- · I totally get why you'd be really angry about that
- I'm so sorry to hear that
- · I feel your sadness with you
- It's can be so painful when we have a employer who never acknowledges our strengths
- Right now is a super busy time It's a LOT.
- Right now is a super busy time. You've got a lot on your plate and I get how frustrating it is to not havetime for X

- You have moved beyond that relationship. Makes sense that it's bringing up many different emotions.
- That would have surprised me too
- Sounds like you really held your composure in a very tough situation
- I wanted that for you too
- · Sounds like you gave it your best shot

Honoring What Is: A Practice

1) A great way to practice the skill of Honoring What Is...is to Honor What Is in your own life

One of the most difficult – yet most healing practices we can offer ourselves is to truly and deeply Honor What Is in our lives and in ourselves. Most of the time, we judge What Is, we fight against What Is, we wish What Is away. And when we do this, we create deeper frustration, self-loathing,

Victimhood and a negative outlook.

I have a regular practice of Honoring What Is – Honoring the not-so-savory things, the less-than-successes, the frustrations, the unfair luck of the draw. And the result of Honoring is the same as when we do this for clients: more calm, more peace, more grace, more hope, more validation, more trust.

I invite you to take some moments and list 10 things in yourself and your life that would benefit from Honoring What Is. Write each one down, and for each one, take a moment, hand on your heart, and deeply Honor It.

The best solutions are found when we have first been honest and made space for honoring what is.

For example (from my real life!):

I Honor that my mother has a debilitating illness that has impacted me greatly. I honor myself for all I have been through as a result of her illness. I honor the pain, the disruption, the heart-ache. I also honor that I am who I am because of this, that my deep listening skills and ability to hold sacred space are a direct result of these experiences.

2) Journaling

- How were not-so-savory things Acknowledged or not Acknowledged in your family of origin?
- Historically, how have family members and others responded/reacted to you when you have acknowledged notso-savory things?
- When we avoid Honoring What Is, what are you actually avoiding or afraid of?



At Home Work

In coaching partner sessions or with clients, find something in the session to practice honoring what is.



Honoring What Is Worksheet

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Acknowledging & Celebration



G When you can masterfully celebrate with clients, it helps to cultivate confidence, self-love, and self-compassion.



Celebration

- Celebrating is a powerful tool for helping clients reach their goals.
- It is powerful because successful actions and aligned visioning stems from what's working and what's going well, not from what's going wrong.
- It helps clients not get stuck focusing on the negative.
- Celebrating helps clients to be connected to their inner wisdom and to their positive energy (always in right balance with honoring what is).
- A general rule, human beings have a lot of trouble celebrating themselves. This is why celebration is such an important awareness and acknowledgement skill.

As transformational practitioners, one of our jobs is to teach our clients how to internalize the skill of celebrating themselves.

Human Behavior Around Celebration (making it a hard practice)

As a practitioner it's important to understand human behavior around celebration because if you don't you have the potential of shutting down your client, upsetting them, having the client lose trust in you, or silently agree but not take it seriously or take it in.

- 1. We tend to focus on the negative and what's not working
- 2. We get an icky feeling when being acknowledged and would rather not be seen
- 3. We don't want to get hopeful and then fail.
- 4. We are taught that it's obnoxious to think highly of ourselves or our accomplishments
- 5. We cannot see our goodness or how amazing we are because of unrealistic expectations
- We don't know how to receive
- 7. We've already moved on to the next thing

Journaling Prompts (from class)

- ➤ How and how often were you honored and celebrated by your family of origin?
- When you were celebrated what was their motivation?
 - To be truly supportive of you?
 - Was the celebration to pretend that everything was okay when it really wasn't?
 - Was it to pressure you to continue to perform well?
 - Were you celebrated to compare you to your siblings or others in your family?
- What was the spoken or unspoken message behind the ways you were celebrated or not celebrated?
- ➤ How did role models or authority figures respond to you when you celebrated yourself?
- ➤ Do you tend to focus on the negative or on the positive? On your assets or on your deficiencies?

Journaling Prompts (deeper dive)

- ➤ How do you respond to the idea of celebrating in your personal life?
- ➤ Beyond birthdays and anniversaries, what other ways do you practice celebrating in your life?
- ➤ How do you personally receive compliments?

When to Acknowledge & Celebrate

- On pre-session form, ask what they would like to celebrate
- At beginning of session, set container and include what would you like to celebrate
- Anytime working with a client on a new project, before strategizing ask them to list assets and resources they have to help achieve their new project or vision.
 - Listing assets helps them see what they want to do is actually doable.
 - o Gives them more confidence
 - Success is based on leveraging assets
- Celebrate as it comes up organically in a session
- Let clients know in different ways how much you respect, honor, and admire them
 - One of the sacred roles of a coach is to support clients in knowing they are a person of value. This is a sacred act.
- Cheer them on and encourage them but always do it with honesty and not exaggerated
 - This can be another way to hold clients' vision for them, at the times when doubt shows up and they can't hold the vision for themselves.
 - o Sometimes a simple congratulations that is authentic and heartfelt goes a long way.

Another function of celebrating is to give your clients permission to be as big as they would like to be and in doing so we are correcting patterns from their childhood that told them otherwise.

A Practice

- For the next 7 days, take a few minutes every day and write down 5 things you want to celebrate.
- If you are working with clients: for each client, list out 1-2 things that you sense they are not adequately owning inside themselves or celebrating for themselves. Consider bringing it into your next session.





- 1. Experiment with mirroring simple truths
- 2. Keep working on reflecting hard truths
- 3. Find something in the session to practice honoring what is.
- 4. Find something to celebrate

Skill Focus



Acknowledging & Celebrating





Honoring What Is



Cultivates our clients' trust in themselves

Strengthens the Coaching Container

EMPOWERED COMPASSION: Honoring what is **WHILE ALSO** seeing the client in their strength & possibility

Acknowledging & Celebrating



Successful actions and aligned visioning stem from what's working well, not from what's going wrong

Toxic Praise



- Separate praise from recognition
- Praise feels icky because it's external validation
- Recognition is empowering because it's reflecting back



Creating Awareness Self-Quiz

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uth?

(1) Creating Awareness is the act of supporting your client to see, acknowledge or accept something about themselves or their situation they could not before. (2) Ask questions that illuminate truth; Reflecting the truth back to client; Via consulting/facting/messaging — sometimes client needs your expertise & wisdom; Acknowledging as celebrating; Thru personal anecdote or storytelling; Using myth and metaphor; Mirroring (3) Reflecting the truth. (4) All of the above. The strategy you use will depend on the client. Always coach the what based on the who.

5.	T/F: When you honor what is, you are empathizing with your client.
6.	Why might some clients find it hard to celebrate themselves, or resist Celebrating?
7.	What does "Honoring What Is" mean?
8.	What does "Empowered Compassion" mean?
9.	When is a good time to practice acknowledging and celebrating?

(5) True. Often a client needs empathy more than rooting them on or strategizing. They need a space to be held and validated in what they are feeling. (6) We tend to focus on the negative and on what isn't working; We get an icky feeling when we are being acknowledged ("don't see me"," it's not true", "if you or I believe this now, then it won't happen again and I'll look like a fraud"); We don't want to set and our accomplishments; We don't really think highly of ourselves and our accomplishments; We don't really think it's that good; We don't really think highly of ourselves and our accomplishments; We don't really think it's that good; We don't really know how to receive. (7) they're feeling and experiencing. (8) To hold two things at once: Honoring what Is WHILE ALSO seeing a client in their strength, wholeness, and completeness. (9) On a pre-session worksheet, at the beginning of a session, or organically as it comes up in sessions

Sacred Depths

Breakthrough Questioning Skills - Part 1

APPLIED PRACTITIONER INSTITUTE



Principles of Powerful Breakthrough Questions



At the heart of masterful coaching and real transformation is masterful questioning.



The most masterful coaching questions have the ability to do the following:

- Create awareness, breakthroughs and new habits
- Access client's intuition
- Promote creativity, brainstorming, and problem solving
- Empower clients to take responsibility for themselves
- Create integrity and commitment
- Help client articulate their judgment
- Activate learning
- Create connection to self

Principles of Powerful Questions

- 1. Avoid getting attached to a particular answer or outcome
- 2. A good question is rooted in:
 - Listening to client and being attuned to their needs
 - Listening to your own intuition and curiosity
 - Keeping track of bigger picture agenda
 - Your own experience
- 3. Remember client ALWAYS has a choice
- 4. Be willing to be lovingly bold
- 5. Language can help create masterful questions
- 6. As a general, use open-ended questions
- 7. Slow down the line of questions and connect the dots
- 8. Think about word choices when asking questions
- 9. Questions should sometimes challenge and stretch client
- 10. Be conscious of what level of learning and transformation a client needs in that moment
- 11. Use your questions to make connections on patterns, events, habits, or ways of being you notice in your client's behavior.
- 12. Know when something is meant to remain in the mystery for the time being

Make sure questions aren't leading. Avoid making assumptions and baking those assumptions into your questions.



Breakthrough Questioning Skills – Journal Prompts

Journaling Prompts (from class)

- Are there moments when you take shortcuts through consulting rather than providing learning opportunities with questions for clients? Why do you think this is happening?
- How often do you ask a question expecting a particular answer?
- On a scale from 1-10, how good are you at remembering that you have choice in your life and/or your business?
- How does it impact your life when you forget that you have a choice?
- What's one place in your life that could benefit from a philosophy of choice?

Questioning is a powerful tool for breakthrough because human beings are curious by nature and curiosity leads to learning.

Deeper Dive Journaling

- In class, six (6) reasons practitioners default to consulting instead of asking questions were identified. Of these, which one(s) resonate most with you? What steps can you take to shift this tendency so you can ask more breakthrough questions instead?
- A spirit of curiosity is important to asking powerful questions. How does curiosity show up in your life? Are you naturally curious or is this something you have to develop? How can you cultivate more curiosity in your day-to-day life?
- Extra credit homework: Think about each of your clients (or your coaching partner) and name the places where they're assuming they have no choice. How can you invite choice into the conversation?



Strengthening Questioning Skills Through Inner Work

oaragraphs on a co		,

2. Read over what you just wrote.

3. Intentionally craft 3-5 powerful coa	aching questions based on what you just wrote.
4. Journal on those questions.	At Home Work When working with clients, slow down a bit in sessions. Take a moment to craft questions based on the principles discussed in class. In partner sessions, do the same AND afterwards, breakdown the questions asked to see if you could have gone deeper with your question asking.



Coaching Session Self-Assessment

Name of Client:				
Session Date:				
What did I do really w	ell in the coachi	ing session?		

What didn't work or go as well as I wou	ld have liked?
What is my intuition telling me about the this client session and previous ones?	nis client? What patterns/themes am I seeing between
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What questions could I have asked? What are some questions I could have asked differently?
What do I want to work on skills-wise, or shift inside myself for my next session with this client?

Masterful Questioning





Power in Self-Discovery





Consulting

in many, but not all, circumstances

Principles

SOME of the Principles of Powerful Questions

- No attachment to the outcome
- In service to the client's agenda
- The Principle of Choice
- Be lovingly bold (as needed)
- Succinct.
- Open ended (usually, not always)

- Ask a question and LET IT LAND
- The power of our word choices
- Healthy tension, welcoming silence
- Activate the levels of learning
- Support client to connect the dots
- Embrace & trust the mystery

Masterful questioning is an art that weaves in all of our coaching skills

Sacred Depths

Breakthrough Questioning Skills - Part 2

APPLIED PRACTITIONER INSTITUTE



Resource Sheet: 50 Questions

- 1. What do you really want?
- 2. How can I help you right now?
- 3. Have you ever considered . . .
- 4. Why do you think that's so?
- 5. What is that?
- 6. What's the dynamic here?
- 7. What's your role in that?
- 8. How long have you been doing that?
- 9. What is the permanent solution?
- 10. If you had a choice, what would you do?
- 11. Really? Are you sure?
- 12. What's the message here?
- 13. What is life asking you to do differently?
- 14. What gets in your way in this area?
- 15. What is your biggest fear about that?
- 16. What are the 3 steps to achieve that?
- 17. How could you over-respond to that?
- 18. How do you know that?
- 19. Is it or isn't it?
- 20. Does this really matter to you?
- 21. Whose life are you living anyway?
- 22. What question should I be asking?
- 23. What is your strategy for that?
- 24. What do you most need right now?
- 25. What kind of support would be helpful?

- 26. What would give you the most joy?
- 27. What is currently motivating you?
- 28. How healthful is that for you?
- 29. What are you tolerating?
- 30. Why are you pushing this hard?
- 31. Where is your integrity soft?
- 32. How are you underutilizing technology?
- 33. Isn't that delegate-able?
- 34. Why are you spending time on that?
- 35. Would environmental changes help?
- 36. Are you being selfish enough?
- 37. How could you simplify that?
- 38. What is the truth here?
- 39. Why is that so frustrating?
- 40. What is your vision?
- 41. If you were the coach, you'd say . . .
- 42. What is your next evolutionary step?
- 43. What would make that perfect?
- 44. Where might you get stopped?
- 45. What is your unique talent?
- 46. How is this problem perfect?
- 47. Who can get you that answer?
- 48. How are you?
- 49. Will you tell me everything?
- 50. How are you best coached?



Question Categories & Sample Question Sequences

Providing building blocks to help you craft a powerful breakthrough question in the moment it is needed

1) 'AM I GETTING THAT RIGHT?' QUESTIONS

When to Use: After you've reflected back to a client or created awareness by mirroring.

Examples:

- I'm hearing X, am I getting that right?
- It sounds like you're saying Y. Did I hear that correctly?
- As you were speaking, I could almost sense that Z. Am I getting that right?

(Opportunity to create awareness - how you state what you're hearing; you can insert some of your own perceptions and view of the situation and see if it resonates.)

2) DEFINITION QUESTIONS

When to Use:

You may think you know what the client means when they use a certain term to say a certain concept, but don't make assumption. You may actually be working with a different definition than them, so it's important to ask. Also, it's so powerful for the client to define something for yourself. Examples: Freedom, Family, Romantic Relationship, Success, Balance. It's a way of helping to connect the dots.

- What does X mean to you?
- Define "Y"
- Explain "Z" a little more --Tell me more about . . .
- How is X different than Y? (Ex.: How is space in your schedule different than space in your mind or body? Or how is self-trust different than self-confidence? How is service different from servitude?)

3) CLARIFYING CURRENT SITUATION QUESTIONS

When to Use: To gather more details on current situation both for you as coach as well as to create more awareness and understanding for client. Only go as far as the details you need and be mindful not to ask to satisfy your own curiosity; it must be in service of the client.

Examples:

- What exactly did she say during the team meeting?
- When you say no one signed up . . . Was there interest? An enrollment conversation?
- How did that date go badly?
- Tell me a little bit more about . . .
- What are you overlooking?
- What was your intention when you cancelled that doctor's appointment?
- 4) VISIONING QUESTIONS (Not "big" vision like our upcoming Vision & Strategizing Module)

When to Use:

- a. Something needs to change
- b. Something needs to be shifted or adapted
- c. An issue needs to be resolved and seen in a different way
- d. There is a new creative idea, projective or incentive ready to emerge that needs support
- e. Client is ready for expansion

If your client is feeling like everything is wrong in a particular area of their life, visioning questions can help put things into perspective.

- What would it look like if . . . you owned your own business, you had a child, you were painfree, you found your perfect home?
- If you could change 1 thing about X, what would it be?
- If you could have this any way you want, how would you have it?
- What would the best possible outcome look like here?
- What would an ideal X look like? (Examples: Relationship? Wedding? Program launch? Schedule? Job? Team?)
- What would you like to have happen here?
- Share with me the details, round out this picture . . .
- What do you see when you step out of the box?
- Where does the Universe want you to stretch next?
- What else wants to happen here? What else wants to be painted into the picture?

5) FEELING QUESTIONS (Activates the Body or Heart Level of Learning)

When to Use:

- a. After a series of Intellectual Awarenesses/Mental Level Learning
- b. When you sense client needs to connect deeper than the Mental Level of Learning
- c. When you sense there is not an emotional resonance with what you are discussing

Examples:

- How would that feel?
- How do you feel in your body right now? Or, how do you feel in your body as you describe that [the situation or circumstance]?
- What does your heart tell you about this?
- What energy do you associate that with?
- What do you notice about the tone of your voice?
- What's the feeling underneath that [the confusion, worry or anxiety]? (There is usually an emotion or feeling UNDERNEATH the stated feeling, particularly for confusion, worry or anxiety; in general, fear or anger or grief lay beneath those)
- What is an image or metaphor that reflects X situation? (also powerful for the coach to provide a metaphor or image- "It reminds me of a racehorse waiting at the gate . . .")
- What would feel exciting here? (or Joyful or Inspiring . . . Whatever is a value of the client)
- What would help you feel happy?
- 6) **MOTIVATION QUESTIONS** (Connects client to their big WHY. When your client is aware of their true motivation, it's easier for them to move forward.)

<u>When to Use</u>: When you sense your client needs motivation, or a bigger reason, a mission, or inspiration in order to move forward. These questions help a client connect more deeply to their motivation to do something and are related to the Spirit Level of Learning.

- Why?
- What's your deep why?
- Why is that so important to you?
- What about that excites you?
- You can continue to ask WHY? 3-4 times and get deeper and deeper
- What value does this experience have for you?
- Why might Spirit be inviting you into this project?
- What is your higher wisdom telling you about this situation?

7) PERCENTAGE OR NUMBER QUESTIONING

When to Use:

- a. When a client needs support distinguishing story from reality;
- b. when a client is unclear about their "Truth";
- c. when a client is confused about something in their life. Use after they have shared something that seems misaligned to you or confused.

Examples:

- On a scale of 1-10, how true is that statement?
- What percentage of your friends are actually not thinking about your best interest?
- On a scale of 1-10, how much do you actually want to apply for that job?

8) Uncovering the Obstacle Questions

When to Use: When your client has an obstacle and they can't see it. Or, they're having trouble doing something they want to do.

Examples:

- What's standing in your way?
- What's challenging here?
- What are you scared of?
- What's at risk for you?
- Pretend you know the answer. What would it be?

9) INSIGHT INTO THE OBSTACLE QUESTIONS

When to Use: These are a good place to go after you've uncovered the obstacle; this starts to poke holes in the obstacle.

- Why are you so attached to this particular obstacle/fear?
- What would be possible for you if you were to let go of this fear?
- How has this obstacle impacted other areas of your life?
- When did this obstacle come into being?

10) STRATEGIZING QUESTIONS

When to Use: Usually closer to the end of the session.



Examples:

- What would you like to do differently?
- What can you change about this immediately?
- What are 3 action steps you can take this week to . . .
- How do you plan to achieve that?
- If you were to move past this obstacle, what would you do, no matter what?
- What new belief would you like to step into? What would be the next step around that?

11) GETTING SUPPORT QUESTIONS

When to Use: When a client is overwhelmed or taking on too much.

Examples:

- Who can help you with this?
- If you knew they'd say 'Yes', who would you ask for help?
- What can you delegate?
- What requests can you make?

12) SIMPLIFYING QUESTIONS

<u>When to Use</u>: When a client is overwhelmed, taking on too much, or unhappy with a current situation. Helps the client simplify or prioritize what needs to stay and what needs to go. (*Can also be used on the Full Moon if you are tracking lunar cycles.*)

- What can you say 'No' to starting today?
- What are you tolerating?
- What can you simplify?
- What's no longer serving?
- What's no longer aligned?
- What's the priority?

13) INTEGRATION QUESTIONS

When to Use: After a lot of awareness has been created, or different strands/threads/ideas have come to the surface, or at end of session.

Examples:

- What are you seeing for yourself here?
- What's important about this?
- What's the bigger picture with all of these threads that we've been looking at?
- What are you learning?
- What's your takeaway?
- What's the wisdom that's coming forward here?

14) YES/NO QUESTIONS

When to Use: Very sparingly; they will be most powerful if only used seldomly, and in moments when a client is on the verge of making a serious commitment or decision.

Examples:

- Are you done with staying up so late?
- Are you ready to commit to blueprinting every day?
- Are you willing to let go of your relationship?
- Will you continue to complain every day?
- Are you finished allowing yourself to be a doormat?

15) Interruption Questions

When to Use: When a client has been talking too much and not getting to the point or distracting themselves with details or unimportant threads.

- What is the essence of what you're saying?
- What feels most important about all you're sharing?
- I sense you're beating around the bush. What are you avoiding here?

16) CHALLENGE QUESTIONS

When to Use: These aren't exactly questions, more like invitations. Use in moments when a client is ready to stretch beyond their perceived limitations in a serious way. These questions lovingly push a client beyond what they think is possible. It involves measurable action.

Examples:

- I challenge you to generate 3 sales calls this week. How does that land for you?
- I challenge you to stop complaining for a full week. What do you think?
- I challenge you to reduce your expenses this month.
- I sense that's too easy for you. How can you go further?



17) Intention Setting Questions

When to Use: When a client is ready to make a new commitment, inner or outer. (*Can also be used on the New Moon if you are tracking lunar cycles.*)

Examples:

- What intention would you like to set?
- What will your focus for this month be?
- What is the new energy you're bringing in?

18) CONFRONTATIONAL QUESTIONS (Bold & Fierce Questions)

<u>When to Use</u>: These are questions that help clients jump over blocks by being slightly confrontational with them . . . and loving at the same time. It's important to make sure the client is in the right place before you ask Confrontational Questions.

- What if what you just shared was actually not true at all?
- I feel like I want to call BS on what you just said. What do you think?
- Is it possible your relationship is wrong for you?
- How have you been clinging on to this relationship to keep you safe?

19) **ENCOURAGING QUESTIONS**

When to Use: When a client is thinking about stretching herself, but needs extra encouragement, assurance, and motivation.

Examples:

- What do you need to say 'Yes' to creating an online dating profile?
- It feels like you're almost there. What do we need to adjust inner or outer so you feel ready to create an online dating profile?

20) ASSESSMENT QUESTIONS

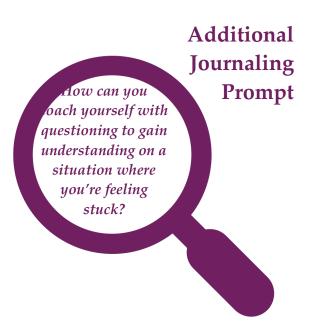
When to Use: When a project or initiative has either come to an end, or come to a turning point, or come to an obstacle.

Examples:

- What's working?
- What are your resources and strengths in the project/situation?
- What's not working about the situation? Why?
- What can you learn from the situation?

Journaling Prompts (from class)

- Of all these types of questions, which feels the easiest for you?
- Which of these categories are you most excited about leaning into?
- Which of these categories don't resonate as much with you? Or feels too hard?
- What questions do you have inner or outer on any of the categories?



Sample Question Sequences

1) REFLECT THE TRUTH + ASK A QUESTION

- You don't have to be a Victim here. You have a choice. What would you like to do?
- The most effective ways of expanding your community are networking, JV projects, speaking and ads. Which feels aligned for you over the next 6 months?
- The longer you continue to cling onto this belief, the longer you will suffer. What would help you to let this belief go?

2) AWARENESS + INSIGHT + ACTION = RESULTS

- What's standing in your way here?
- What would be possible if you were to let go of this fear?
- What action can you take around this?

3) MIND + HEART + SPIRIT + ACTION

- What do you know you want in a relationship?
- How does it feel to not have that relationship right now?
- What does your Inner Wisdom want you to know about this? What's one thing you can do this week to support that inner wisdom?

4) PERCENTAGE OR NUMBERING QUESTION, followed by 'WHAT WOULD IT TAKE?' QUESTIONS

- On a scale of 1-10, how ready are you to apply to graduate school? (Client answers '7'.)
- What would it take to get you from 7 to 10 (or 9)?



Choose one of the sequencing strategizing to practice in your partner coaching session or with a client. Don't force it but be intentional to look for the opportunity to practice.

Reflection



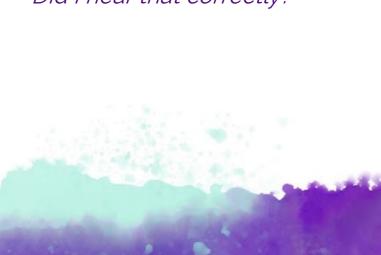
Breakthrough Questioning Skills II

20 Question Categories

'Am I Getting That Right?' Questions

I am hearing X, am I getting that right?

It sounds like you are saying Y.
Did I hear that correctly?



Definition Questions

What does X mean to you?

Explain Y a little more – Tell me more about...

Clarifying Current Situation Questions

What exactly did she say during the team meeting?

When you say no one signed up... was there interest? An enrollment conversation?



Visioning Questions

If you could have this any way you want, how would you have it?

Where does the Universe want you to stretch next?

Feeling Questions

How would that feel?

What does your heart tell you about this?

What's the feeling underneath that?

Motivation Questions

What about that excites you?

Why? Why? Why? (continue to ask why to go deeper and deeper)



Percentage or Number Questions

On a scale of 1-10, how true is that statement?

What percentage of your friends are actually not thinking about your best interest?



Uncovering the Obstacle Questions

What's standing in your way?

What's challenging here?

What's at risk for you?

Insight into the Obstacle Questions

What would be possible for you if you were to let go of this fear?

How has this obstacle impacted other areas of your life?



Strategizing Questions

What can you change about this immediately?

What are 3 action steps you can take this week to ...

Getting Support Questions

If you knew they'd say 'Yes', who would you ask for help?

What can you delegate?

Simplifying Questions

What can you say 'No' to starting today?

What's no longer aligned?

What's the priority?



Integration Questions

What are you seeing for yourself here?

What's the bigger picture of all of these threads that we've been looking at?



Yes/No Questions

Are you done with staying up so late?

Are you ready to commit to blueprinting every day?

Interruption Questions

What feels most important about all you're sharing?

I sense you're beating around the bush. What are you avoiding here?



Challenge Questions

I sense that's too easy for you. How can you go further?

I challenge you to generate 3 sales calls this week. How does that land for you?



Intention Setting Questions

What intention would you like to set?

What will your focus for this month be?

What is the new energy you're bringing in?

Confrontational Questions

What if what you just shared was actually not true at all?

I feel like I want to call BS on what you just said. What do you think?



Encouraging Questions

It feels like you are almost there. What do we need to adjust -inner or outer - so you feel ready to create an online dating profile?

Assessment Questions

What's working?

What are your resources and strengths in the project?

What's not working about the situation? Why?



Harnessing the Empowerment of Trauma Informed Skills

The Sacred Depths methodology is committed to being as trauma informed as possible.

Transformational methods that do not take trauma and survival strategies into account are at best less effective and at worst may trigger the client into shame, and further trauma responses. And, when we employ trauma-informed perspectives we get to harness empowerment – for our clients, and for ourselves!

Practitioner: Befriend your own Fears on the topic of being Trauma Informed

The topic of being trauma-informed can sometimes be activating for practitioners, bringing up fears like:

"I'm a fraud"

"I'm going to do this wrong"

"I'm scared to harm others"

If you have fears that come up around this topic, there are likely a number of reasons:

The topic of "trauma" carries so many taboos because of the ways our society has handled it and characterized it. It's not until pretty recently that society in general has stopped speaking of trauma with hushed tones, pathologized perspectives, and as something that is not mainstream.

Another reason the topic may activate you is likely because you are a person and practitioner of integrity – that is one reason why you chose Sacred Depths in the first place!

As a practitioner of integrity, you know that there are practitioners in the industry who are not informed and may be inadvertently causing harm, and you don't want to be that practitioner.

- > Honor and cherish your commitment to integrity. (I honor you for it).
- > Honor yourself for your commitment to knowing your scope and staying in your scope.
- > Continue to stay informed. Learn and show up with the important skills you're learning...but at the same time, do so with joy, trust, and spaciousness.
- > Also, become aware when your commitment to integrity starts to mingle with old beliefs about not being good enough or being wrong or a fraud, old fears about others judging you, and more. Continue to work on and address those fears and beliefs.
- → REMEMBER: When it comes to being trauma-informed and ANYTHING else there is no Myth of Perfection for any practitioner, no matter their title, scope, practice, or background. We all make mistakes and we are all, always, learning and discovering more on the topic personally and collectively. *I am sure at some point I will update this resource sheet on Being*Trauma Informed because new information will come to light!
- → <u>REMEMBER:</u> You already know so much more about being trauma-informed than you are likely giving yourself credit for! It is baked into every session of Sacred Depths even when it is not named as such!
- → <u>REMEMBER:</u> "Deep and Sacred" does not always have to equate with "heavy". We get to choose what energy we bring to these studies, these perspectives, these skills and our clients.

Journaling:

- 1. What are some unhelpful beliefs you hold when it comes to your scope on the topic of being traumainformed?
- 2. Track those beliefs back to their simplest form (i.e., "My actions harm others", "I'm a fraud", "I don't know enough", etc.). Where did you first learn or get exposed to those beliefs?
- 3. What are some higher wisdoms/more helpful beliefs to remember and come back to?

What does Trauma-Informed mean?

Being trauma informed <u>doesn't</u> mean that it's in your scope to go deep with a client into the crags of an event that created a trauma response for them.

Some (but not all) therapists who treat trauma *may* work deeply with the "there and then", but coaches do not. Coaches and transformational practitioners focus mainly on the resources and wisdom that are available to a client in the present and in the future.

What being trauma informed does mean:

- First and foremost, we recognize as practitioners our *own* trauma and trauma responses and check ourselves as best we can to not bring it into our client containers (this is in part why working on our Energetics is so important).
- We stay aware of our feelings and what we bring to the container, and if we notice our trauma responses consistently show up in our client containers beyond our control, this is an indicator we may need therapeutic support.
- Being trauma informed also means that we recognize the likelihood of trauma in the
 histories and lives of the people that we serve, and that we have awarenesses and skills
 that will help us lower the possibility of unintentionally triggering a trauma response in
 our clients.

Trauma Informed Practitioners also understand that trauma responses can be related to personal experiences or from cultural systemic discrimination or harm.

Being trauma informed also means that we understand that the survival strategies our clients have - for example overworking or shying away from speaking their truth - may have developed as a result of a traumatic experience.

- Clients' traumatic responses will very much make their ways into our coaching containers there is almost no way that they cannot.
- As practitioners, it is our jobs to support our clients in creating awareness of these survival strategies, as well as supporting our clients to make a distinction between the "then and there" and the "here and now". By doing this, we help clients resource themselves from the "here and now" moment versus the "there and then" moment.

When a client is resourced from the "here and now moment", new energy or inspiration can come forward, new solutions and brainstorming can emerge, and that is where re-commitment to aligned goals be strengthened.

As we work with and track our clients, if we see in our sessions that they consistently get pulled into the "there and then" or are unable to get grounded in the "here and now", that is a good indicator that our client may benefit from working with a therapist. It is within a coach's scope of practice to create awareness with a client that therapy may be valuable for them.

General Trauma-Informed Best Practices



Pacing

- When it comes to co-creating strategies with clients, what is the strategy and execution pace that is aligned for your client?
- It's also important to think about the pacing of your session work with your client. You may want to go slower, especially when you are building your container and trust.

Create Strong Containers

- Setting, Agreeing on and Honoring Rules, Agreements, Expectations. Maintaining Boundaries.
- How you are holding the container energetically (including being aware of your own triggers).
- Your rapport with your client. Trust and trustworthiness are HUGE.
- Transparency
- Showing your client that they are being seen and heard.
- Create collaborative relationships.

Consent and Getting Permission

- Things to avoid:
 - > Touching body without asking for any permission
 - > Saying things like, "You MUST do this, this way..."
 - > "I went ahead and did an energy check on you...."
 - > Even something like, "Close your eyes" (vs, "close your eyes or if you don't feel comfortable with that, close the metaphoric shades on your eyes")
 - > Asking client to breathe in a particular way if you haven't agreed on it first
 - > Going past session time without getting consent (vs. "Can you hang on the line another 15 minutes? I've got the time if you do.")

Other things to consider

- Ask Body-Based questions rooted in the "here and now" versus the "there and then". For example: "How does the fear of not being good enough feel in your body right now?" versus "How did it feel in your body when X (trauma) happened?"
- Remember the right to privacy. When a client shares about a painful event, listen with honor, respect, and acknowledgment. Thank your client for sharing this with you. And if you want to ask a follow-up question, first get consent: "Would it be ok if I asked a question about that?" or "Would you like to tell me more about that?"
- Be mindful to not shame your client or pathologize their fear, trauma, or resistance. Love, honor, and respect all of their experiences and responses.
- Be mindful not to see your client as a "label": addict, abused child, etc.

Discomfort and Dysregulation

- When you work with your clients and use the Sacred Depths methods, they WILL from time to time feel discomfort. Even sometimes a lot of discomfort. This is sometimes necessary as part of the growth process.
- When we lead clients through the BYF process or any other coaching process or conversation for that matter – it is extremely rare, but it may happen that we see our client is collapsing in the emotion of their discomfort:
 - > Their breathing becomes irregular.
 - > They are crying uncontrollably.
 - > Client has become a little spacy.
- This signals that the client is likely dysregulated and it is a trauma informed practice to support them in getting regulated again.

Sometimes our own discomfort with discomfort can lead us to think that a client experiencing discomfort is harmful.

Some things to Consider when Guiding a client who has become dysregulated:

- Ask client to open their eyes
- Invite slow physical movement like standing up or switching chairs
- It can sometimes be helpful to utilize a certain amount of joking or irreverence
- Ask client to describe three things in the room in detail
- In the case of being spacy, ask client to breathe, stretch, pat their body, or feel the ground beneath their feet.

A client becoming dysregulated in these ways will rarely, rarely happen, but it might - whether it's during a BYF process...OR... a "surface" cognitive conversation about a big vision.

As trauma-informed practitioners, we want to be aware that sometimes even an edgy conversation might activate a trauma response. This doesn't mean we avoid edgy conversations if we feel a client is in the right place for it.

- If a client does get dysregulated, you likely haven't done anything wrong and your job is to:
 - > Not get activated yourself,
 - > Remember your client is whole and complete, and
 - > Stay present with your client.

Being Trauma-Informed in the Befriend Your Fear Process (and other somatic processes)

The BYF method supports clients to resource from the "here and now" moment when a fear or survival strategy presents itself. It does this in many ways, including:

- Helping the client identify the "there and then" moment their fear and survival strategy is based in.
- Supporting the client to connect into how they feel in their body in the "here and now" while experiencing the fear.
- Bringing the fear out of the blind spot so that the client can see the fear isn't all of them and then also become more seated in the REST of themselves and their higher wisdom.
- When you support a client to dialogue with their body in the here and now, they are engaging their current cognitive wisdom, body wisdom, heart wisdom, and spirit wisdom. They are also forward looking to the future!
- Supporting your client to co-regulate with all their current resources, even in the presence of the discomfort of the fear.

Trauma informed techniques for the BYF process:

- Before leading your client into the process, ask if the client would like to go deeper and get permission.
- Invite client to close their eyes if it's comfortable but give them the option to keep eyes open if that's their preference.
- Do not ask client to modulate their breathing in any way.
- Support client to feel grounded in their bodies and the seat they're currently in.
- Go slow through the process and give ample space.
- Throughout the process, let your client know they're doing really well, encourage them with love in your voice and let them know that you're with them.
- When your client identifies the "then and there" moment that the fear comes from, create even further awareness as well as rootedness in the wisdom of the "here and now" by saying something like, "Ahh, so when this fear comes up it's usually not your current self with your current resources that's running the show."
- Sometimes it can be helpful to ask questions of the "highest wisdom" of the fear than the fear itself.

<u>Most importantly:</u> **ENJOY the process!** The Befriend Your Fear Process can be so valuable and so satisfying not just for clients, but for us as we hold this beautiful and sacred space for another human being to connect with themselves, their resources, their strength, their wisdom, and their power. Remember to enjoy!

If you'd like to take this
further...

I highly recommend the book
"Coaching and Trauma:
From surviving to thriving"
by Julia Vaughan Smith.



Questioning Skills Self-Quiz

1.	What is one benefit of a masterful coaching question?		
2.	If a practitioner is uncomfortable with the learning process, or fear the client will take		
	too long to learn, what are they prone to doing rather than ask questions?		
3.	When is learning most optimal for a client?		
4.	A good question is rooted in?		
	a. Listening to client and being attuned to their needs		
	b. Listening to your own intuition and curiosity		
	c. Keeping track of bigger picture agenda		
	d. Your own experience		
	e. All of the above		

I) Create awareness, breakthroughs, and new habits; help client access their own intuition; Activate creativity, brainstorming, and problem solving; Empower clients to take responsibility for themselves; Create integrity and foster commitment; Help client articulate their own judgments; Activate learning; or Create connection to self. 2) Consulting. Too often practitioners consult when what is needed in the moment is a good question. 3) When it comes through self-discovery, self-inquiry, self-proclamation, or when they answer questions for themselves. 4) All of the above.

5.	T/F: There is a formula for masterful questioning and if you follow that formula, you'l be a master practitioner
6.	T/F: As a general rule use open ended questions, instead of multiple-choice questions
7.	When is the best time to use "Am I Getting it Right" types of questions?
3.	What is the Principle of Choice and how can you integrate it into your Questioning Skills?
9.	When are the best moments to use Number or Percentage Questions?
10.	What are the 4 Levels of Learning & Processing?

5) False. Masterful questioning is an art and does not exist in a vacuum. Masterful practitioners are working all their skills, all at the same time. 6) True 7) After you've reflected back to a client or created awareness by mirroring. 8) The Principle of Choice is remembering that your client always has some sort of choice in whatever situation they are sharing, even if they do not immediately recognize that they do. Asking questions like "What would you like to have happen here?" or "What are your choices?" or "In what ways do you have a choice here?" can be helpful. 9) When a client is ready to separate story from Truth. 10) Cognitive, Emotional, Spirit, and Body

Sacred Depths

Visioning 1





Co-Creating Magnificent Visions Resource Sheet

When people don't get what they want from life, usually it's because they don't know what they want.

Keith Ellis, The Magic Lamp

Visioning

"Visioning is helping clients get clear in aligned ways on what they desire in the future. This clarity is often the most efficient way to help client get, create, or achieve what they want."

Foundation for Co-Creating Aligned Vision

Start with the bigger vision

- Ask about vision throughout the process. On sales call, in welcome packet, and follow-up during the first call.
- It's okay (and sometimes better) to vision only a year or two out.

Track and check in on visions regularly

- Checking to see if a vision needs to be tweaked or shifted.
- Be mindful not to let a misaligned vision go on and on if things have changed.

Know the difference between a vision and a goal

- Vision = the bigger picture, farther off into the future
- Goal = a marker on the journey to the bigger picture. This is typically within sight.
- The vision is the guiding light and the goals are dictated by the guiding light

Know the difference between a desire and a "should"

- Visions based on "should" are misaligned
- To help client discern the difference:
 - o Why do you want this?
 - On a scale of 1-10 how much do you really want this? Why that number? What does it mean for you?
 - o What about this vision excites you?
 - Close your eyes, where are you feeling this vision in your body?

Ensure whatever vision is being created is in alignment with client's core values and priorities.

- Help client get clear about their core values and what is most important to them right now.
- If not clear about personal values, then values can end up being based on other's or society's values.

Give permission for true visioning and for breaking rules

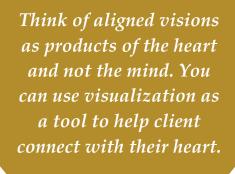
- You want your coaching container to be a place where people can give themselves permission to vision in aligned ways.
- Permission giving questions:
 - What would you want to accomplish in life if I were absolutely positively certain you would do it?
 - o What would you really want from life if I were absolutely, positively certain you would get it?
 - o What are you scared of when it comes to giving yourself permission?

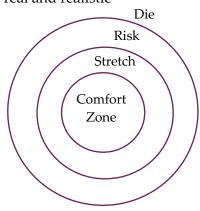
Be thorough when co-creating a vision with a client

- Take all different aspects and pieces into consideration so the vision can be real and realistic
- Get into the details beyond simply the numbers

Make the vision a stretch

- Generally speaking, the best visions are a little bit out of client's comfort zone
- When co-creating a vision want it to be suited to your client's future self; to who they are becoming, what they are mastering, and who they're evolving to be.
- When co-creating a vision or a goal with client, you want them to be in the zone of stretch or risk but not "I'd rather die than do that."





Believe in the vision

- If you're having trouble believing in client's vision, there are a couple of places you can look:
 - o Your own history, beliefs and habits?
 - Are there legitimate places you sense your client is setting themselves up for failure with this vision? Work with client to identify where this may be true.
- Helping your client to believe in the vision
 - o What inner resources do you have to help you achieve this?
 - o What outer resources do you have?
 - What have you already created that gives you evidence you can do this?
 - o Who will you need to be in order to create this?
 - o Are you willing to be that person? How do you know you can step into that person?

Support client to be excited about it.

- Excitement is an important ingredient for a vision to flourish and stick
- Questions you can ask:
 - o What would be possible for you when you achieve this vision?
 - o How will you feel when you achieve this vision?
 - Where in your body do you feel excited about this vision?

Know what season your client is in

(refer to Energetics of New Things worksheet for more on this element)

- If client is in summer or spring, they're in a good place to vision
- If they're in autumn or winter, they may need space before a big vision can emerge

Slow down

• Sometimes a vision doesn't come fully formed. Slowing down the exploration can give it space to come forward.

Be willing to reflect the truth

• If the vision sounds too small or based in fear, or doesn't feel aligned be willing to reflect this back to the client.

When Client is Resistant to Visioning

Manage your energy as the practitioner.

• If you freak out or get frustrated it will impact the client and exacerbate whatever they're feeling.

Normalize the resistance with the client

- **Explore the block** *Questions to ask to uncover why they are resistant:*
 - o What do you sense is in your way of being able to see this vision?
 - o What are you scared of by leaning into this vision?
 - o By not visioning this project, what are you avoiding?
 - o What is it helping you to avoid?
 - o What would be at risk for you if you were to open yourself up and create a vision here?
- Move client out of mental level of learning and processing and into the heart, spirit, or body level of learning and processing.
 - o Lead the client through a visualization, imagining their future self.
 - Create a vision board.
 - o Ask client to connect with Spirit. What does Spirit what you to know?

When client has too many ideas

- Often it can be related to the human fear of not being able to get to it all or having enough time to get it all done.
- Work the client on their priorities. Have them prioritize which one they want to do first.
- Can also look at should vs desire or ego vs desire.



This is a 2-session assignment:

If working with a partner, spend 30-40 minutes supporting partner to build out a bigger vision or goal. Then take remaining time to breakdown what you did, what worked, what didn't, etc.



Track yourself this week and notice the following each day:

- Do you allow yourself to vision what you want into the future, or do you cut yourself off from visioning?
- When you vision, do you spend time imagining the details of your vision?
- Do you take your visions seriously?



Deepening Your Visioning Skills Journal Prompts

Journaling Prompts (from class)

On Permission Giving

- How were you given or not given permission as a child to vision for yourself?
- What did you learn or not learn from your parents or authority figures about creating and having a vision?
- On a scale of 1-10, how often do you allow yourself to fully vision into your future and the things you desire?
- On a scale of 1-10, how seriously do you take this process for yourself?
- Why do you or don't you take seriously or do/don't allow yourself to vision?

On Should vs Desire

- Think of a vision or a goal you are working on right now, what's one part of that vision or goal that is based on deep desire?
- Thinking about the same vision and goal, what part is based on a should? Why is this should showing up?
- What's one thing you are doing in your life right now that's based more on someone else's expectation or satisfaction than on your desire?
- How were "shoulds" instilled in you growing up?
- How do you know within yourself the difference between a desire and a should?

On Stretch, Risk or Die

- Which zone do you generally fall into no stretch, stretch, risk, or die with goals and visions? And why?
- Where is one place in life or work where you can stretch or risk just a little more?
- What do you know, personally for yourself, that helps you to endure stretches and risks better? It could be a belief or a practice.

Co-creating Magnificent Visions

Visioning is helping clients get clear in aligned ways on what they desire in the future.

This clarity is often the most efficient way to help a client get, create, or achieve what they want.



Aligned = powerful foundation Not Aligned = faulty foundation

Know the Difference

between a Vision & Goal

Vision, bigger picture Goal, marker on the journey

Know the Difference

between a Vision & Goal

Vision, bigger picture Goal, marker on the journey between a

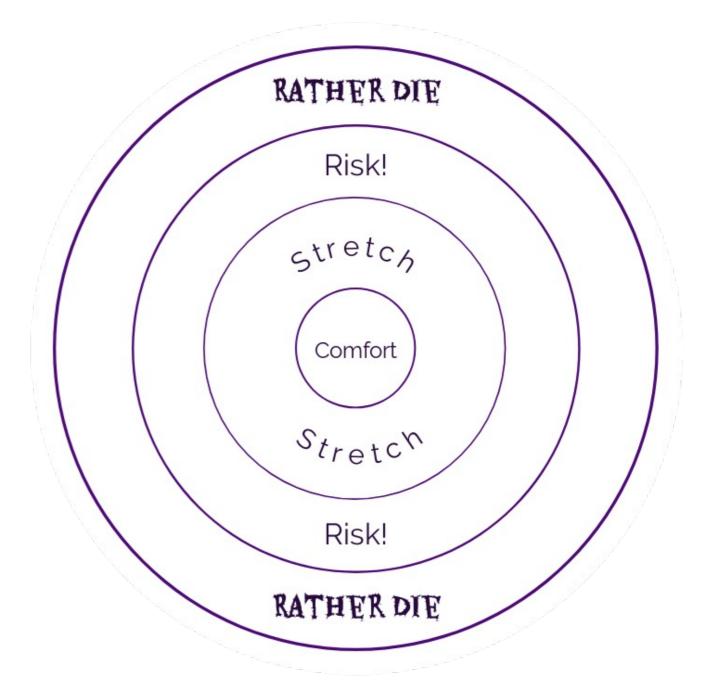
Desire & Should

Create a vision that compels the client to take action

Visioning & Strategizing I

Healthy Stretch*

When co-creating a vision (or a goal) with a client, you want them to be in the zone of ______; but not the _____ zone.



Foundations for Co-Creating an Aligned Vision

We just talked about many of these, and you'll have the comprehensive list with notes in your portal

- Start with the bigger vision
- Track and check in on visions regularly
- Know the difference between a vision and a goal
- Know the difference between a desire and a "should"
- Vision in alignment with client's core values and priorities

- Permission for true visioning
- Be thorough
- Make the vision a stretch
- Believe in the vision
- Support the client to be excited about it
- Know what season your client is in
- Slow down
- Be willing to reflect the truth



Sacred Depths

Visioning Demo using Visualization





Embodied Visioning Exercise + Template

Here is a Visualization you can use to help clients lean into and clarify their Visions. If you are working 1:1 with a client, I <u>HIGHLY</u> recommend using this template as a jumping off point as you listen deeply to what your client shares, and then craft questions based on it.

You can also use this template with groups.

- 1. Before holding space for visualization, ask client what it is they would like to vision a new daily routine? A new career or better job situation? Romantic relationship? More aligned version of their marriage? New program? Etc.
- **I am going to use some questions below specific to a goal of a more aligned marriage as an example, and you can adapt based on client/clients' goals.**
- 2. Invite clients to close their eyes if they feel comfortable doing so, and to start noticing their breath and to connect inwards as much as they feel comfortable.
- 3. Ask them to sense into their body and find where in their body the deep desire for an aligned marriage lives. Connect into this part of their body. Really be with the goal and the desire for an aligned marriage.
- 4. How does this desire feel in your body?
- 5. Ask the desire what it wants you to know about your WHY it's time for you to have a more aligned marriage?
- 6. Ask the desire to reveal to you what's ready to be revealed about this aligned marriage.

- 7. What is the energy of this aligned marriage? What energy is this aligned marriage infused with?
- 8. What does time spent together look like with your partner in this aligned marriage? How does it feel when you spend time with your partner in this aligned marriage?
- 9. Remember to breathe and really continue to connect into your desire for this aligned marriage. Really be with yourself, with your body.
- 10. What is different about the ways you communicate with each other in this aligned marriage? What do you believe about yourself and your partner as you communicate?
- 11. What is sex like in this aligned marriage? How are you and your partner intimate?
- 12. How do you share responsibility in this aligned marriage? How does that shared responsibility feel?
- 13. Continue to be with your vision. See what else wants to be revealed.
- 14. Connect with your body and ask it what is the most important piece of wisdom you need to know about this aligned marriage?
- 15. Ask your body what the very next step is that it would like to take.
- 16. Take a few more moments. Thank yourself, your desire, your body, your vision that is starting to come to life for all the wisdom and inspiration it has brought today. When client is ready, they can open their eyes.

Sacred Depths

Visioning 2





The Energetics of New Things

New Things: New relationship, new marketing strategy, new house, new way of being in the world, new commitment, new program, new creative project. **Any new project or goal or idea.**

New Things have a distinct energy, and the more you can understand the energy of New Things as a coach, the better you'll be able to help navigate clients through new projects, new commitments and new actions, the more their projects and actions will flow.

Ideally, when a client is starting something new, you want to help cultivate a sense of excitement, inspiration, energy, curiosity, openness to try New Things.

Four Phases in A Project



What can get in the way of your clients Starting New Things – and What to Do

- I. "I don't know all the details yet so I'm not excited"
- Visioning, initiation & planting start in the dark. When starting a new project, you're not supposed to know all the details.
- Early Spring is still Wintery.
- Dawn is still darkish grey.
- When we plant seeds into the ground, we don't do so into the light but into dark soil.
- Babies are partially blind when they are first born, and they certainly don't have all of their faculties and resources yet.
- In other words, we almost *always* begin the mystery. The mystery is exciting, but it can also be very scary: We can't totally see, we don't know how, we don't trust the clarity will come, we don't trust it will work, we can't even totally see HOW it will work. All of this can lead to client resistance around starting New Things.

Coaching Tip

What's most important for your work with clients who get caught in this fear: Help Create Awareness around this block and obstacle, and help clients get comfortable with – and even excited – about starting in the dark.

Questions you might want to ask:

- You don't know everything but what do you know?
- When was a time in your past when you moved forward even when you didn't know how?
- Why is it possibly a gift that you don't know it all yet?

JOURNALING FOR YOU TO GO DEEPER

Think of a situation where you started something, and it was still partially in the dark or the mystery: What happened? What do you notice as you look back on it now?

Start journaling with the following statement, and write as fast as you can without stopping for at least 3 minutes: "Starting in the dark feels like . . ."

List out some bullet points of wisdom that would support your clients who have a fear of starting when they aren't in full clarity or understanding.

II. "It hasn't worked before . . . so it won't work now".

"It hasn't worked before . . . so it won't work now" is a very common limiting belief that can come up for clients as they step into a new project or vision. For example:

- "I've tried to lose weight before, and it didn't work . . . so it won't work now."
- "I've tried to find a romantic relationship before, and it has always failed . . . so it will definitely fail now".
- "I've taught a preview workshop before, and no one became a client . . . so I won't get any clients this time."

Coaching Tips:

Help client become aware that this limiting belief is in her way (sometimes clients simply resist New Things, but aren't yet aware of what the obstacle is)

Support client to explore how this New Thing has the potential to be different and more successful.

Questions you might want to ask:

- What learnings about this task do you have now that you didn't have before?
- What resources (inner and outer) do you have that will help you with this task?
- How are you different than the last time you worked toward this?
- Why is NOW the exact, right divine time for this to come to fruition?
- How can I help you be more successful this time around? What do you need from me?

Create Awareness for client about what it takes to get things done.

- It's normal for things to not work the first time (normalize her experience).
- "In my experience, here's what's required to achieve this goal . . . ".

Reconnect client back to her WHY for the task/project/vision.

• Support your client to make her WHY (her deepest reason for desiring the vision) bigger than her limiting belief.

JOURNALING FOR YOU TO GO DEEPER:

Start Journaling with the following statement, and write as fast as you can without stopping for at least 3 minutes: "I start again because . . ."

Make a list of clients who have been hesitating, stalling, self-sabotaging or not being willing to move forward because of a possible fear of "It hasn't worked before . . . "; What would you like to say to those clients?

III. Expecting Process will be Quick Moving with No Bumps in the Road

Be realistic about what it will take. Without appropriate expectations client may be at risk for getting into utter despair because it hasn't happened right away. One of the best services you can deliver for clients is to be realistic and let them know it will take work.

Coaching Tips

Creating awareness – part of this is setting expectations and this is where you consulting skills comes into play (especially if you've been through this before). Undo any myths that client may have fallen into.

Work with client on their resilience skills & wisdom. Reinforce that it's okay to be a beginner; slow and steady wins the race.

Questions you can ask:

- What does resilience mean to you?
- Where do you struggle around resilience?
- What's a belief that can help you build your resilience?

JOURNALING FOR YOU TO GO DEEPER:

- When have you fallen into the trap of expecting thing to happen quickly?
- What happened when you fell into this trap?
- What have you learned from that experience?
- What have you found helpful for yourself when it comes to building your own resilience?

IV. Starting Something New Often Means Letting Go of Something Old

New Things are exciting and shiny . . . but often require the challenging work of letting go of the old vision, the old relationship, the old project, etc. Clients often don't realize they get stuck in this.

Later in Sacred Depths we'll do a full training on Releasing and Letting Go, but for now:

- What are some projects/visions you've put off because you've consciously or unwittingly been too attached and devoted to projects and visions that no longer serve?
- Make a list of clients or friends or family members who haven't started New Things because
 they are caught up in and devoted to stale, old things. What type of Awareness would you like
 to create for them?

V. New Things Require the Energy of Our Elevated Inner Child or Maiden Selves Qualities of the Elevated Inner Child or Maiden include:

- Open
- Excited
- Curious & seeing the WONDER in all New Things
- Not attached to outcome
- Willing to laugh at their own mistakes and continue on
- Filled with pure energy
- No expectation of Perfection
- Unjaded
- Looking for fun

Coaching tips

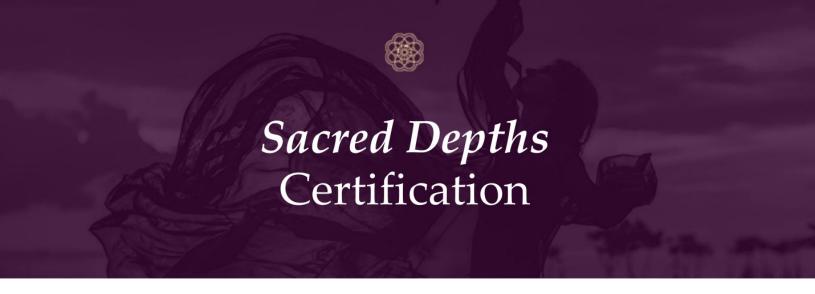
- On a scale of 1-10, how much access do you have to your Inner Child?
- What are the specific moments of history that your Inner Child are buried under?
- What does your Inner Child want you to know about this new project?
- How can you bring your Inner Child more fully present into this new project?

Journaling for you to go deeper:

What would be different for you and your projects/visions if you had full access to the qualities of the Elevated Inner Child/Maiden?

What would be different for your clients if they had full access to these qualities?

- Clients are often disconnected from their Inner Child or Maiden. This part of themselves has been buried under history.
- The more you work on connecting to your own Inner Child or Maiden, the easier it is to support clients to do so.



How to Create Strategies Resource Sheet

Strategizing means co-creating a plan, a pathway of action, or a series of next steps to support your clients to execute and follow through on their Visions.

Strong Foundation

- New things require a strong foundation or a strong container
- What foundation or container does this project need? (For example, does client need to carve out time for this? If client has children, do they need to get childcare?)

Every good strategy needs...

- A clear goal
- A due date for the goal (this can be renegotiated as needed)
- The guiding feeling how does client want to execute this? What is a quality they want to bring with them in this process (e.g. sense of humor, curiosity, creativity)?
- Baby steps needed to reach goal
- Daily or weekly habits (this can be a part of the foundation piece)
 - When clients can blueprint like this, it helps them to pace themselves and helps things feel more doable and realistic
 - o Creates a structure/plan the client can check-in on daily.
- Markers or celebrations that are built in

Understand Natural Rhythms

- Consistent Doers work best doing a little bit every day or a little bit every week
- Deep thinkers and processors need a lot of space around everything they do
- Tipping pointer need to marinate on something for a while and once clicks into place they can take action
- Sprinters doers who need breaks; can do a lot in a week and then take a week off



Deepening Your Visioning and Strategizing Techniques Worksheet

Layering Values and Needs into Your Visioning

Inner Work

- What are your top 5 values?
- On a 1-10 scale, how consistent are you in aligning your vision with your values & needs
- In what areas of life or business do you feel your vision and values are out of alignment?
- What small steps can you take to bring these in alignment?

Client Work

- Make a list of any clients whose Visions you sense aren't aligned with their Values and Needs.
- For each client: If you were to take a guess, what's the Value/Need that is missing from their Vision?
- Design a plan to Create Awareness around this and explore for each client.

Layering Natural Rhythms and Pacing into Your Strategizing

Inner Work

- What is your Natural Rhythm and Pace? (e.g. Consistent Do-er, Deep Thinker & Processor, Tipping Pointer, Sprinter, or another?)
- On a scale of 1-10, how much do you regularly honor your Natural Rhythm and Pace?
- What belief is in the way of you FULLY honoring your Natural Rhythm and Pace? (Hint: It might have to do with something you are scared of, or something someone taught/modelled for you at a young age).
- How would aligning your Action Plan/Strategy with your Natural Rhythm and Pace benefit you?
- How can you adjust your Action Plan/Strategy to accommodate your Natural Rhythm and Pace?

Client Work

- Make a list of all your coaching clients (if you aren't working with clients currently, you can choose 5-10 colleagues, family members, or other people you know).
- Based on your understanding of each person: What is their Natural Rhythm and Pace? (e.g. Consistent Do-er, Deep Thinker & Processor, Tipping Pointer, Sprinter, or another?)
- How is your client aware or unaware of their Natural Rhythm and Pace?
- What are the limiting beliefs or resistances your client may have around their particular Rhythm?
- What can be adjusted in their strategy to really support them and their Natural Rhythm and Pace?



Creating Your Blueprint

<u>Step 1</u> : (Choose 1-3 Measurable Goals that can be completed or started within the next 4 weeks
Step 2: S	State Each Goal Clearly and Set a Time for its Completion
Goal 1:	
Due Dat	te
Goal 2:	
Due Dat	te:
Goal 3:	
Due Dat	te:

Step 3: Write down What You Want for Your Goal and HOW You Want it To Happen Goal 1: Goal 2: Goal 3:

Step 4: Break Each Goal Into 1-2 Hour Baby Steps

Goal:
Baby steps:
Goal:
Goal:

Step 5: Plug each baby step into the next 4 weeks (assign it Week 1, Week 2, Week 3, Week 4)

Baby Step	Week
	,

Step 6: ONLY for the upcoming week – assign each item for this week a DAY of the week (based on your ideal schedule)

Week # 1 Baby Step	Day of Week

Determine what time each day you will do each baby step this week. For example, Monday at 2-4pm or Wednesday at 9-10am. Mark each of these in your calendar.
Step 8: Review and Re-assess each month



Visioning Self-Quiz

1. What is Visioning?	
2.	What is the difference between a vision and a goal?
3.	T/F: Visions based on "should" are misaligned
4.	What can go wrong when a vision is misaligned?

1) Visioning is helping clients get clear, in aligned ways, on what they desire in the future. This clarity is often the most efficient way to help client get, create, or achieve what they want. 2) The vision is the bigger picture. 3) True. Visions are most aligned when they come from the heart and are rooted in desire. 4) When a vision is misaligned, it can end up not being believable to or desired by the client.

5.	In the context of stretching towards a goal, when co-creating a vision or a goal with a		
	client, you want them to be in the zone of or but not the		
	zone.		
6.	What are some ways to create "permission" for a client to feel allowed to vision?		
7.	Which of these are good to do when a client is resistant to visioning?		
	a. Managing your energy as the practitioner		
	b. Explore the block in more detail with the clientc. Normalize the resistance		
	d. Move into the heart, spirit, and body level of learning and processing e. All of the above		
8.	What is sometimes behind a client having too many ideas?		

or having enough time to get it all done.

5) Stretch or risk; not the "I'd rather die" 6) What would you really want to accomplish in life if you were absolutely, positively certain you would get it?; What would you do that totally different if you were absolutely, positive certain you would get it?; What would you do that totally different if you were absolutely, positively certain it was OR?; Explore how and why client hadn't had permission to vision in the past. 7) All of the above. 8) Often it can be related to the human fear of not being able to get to it all

Visioning & Strategizing II

Energetics of New Things

As a coach, the better you understand the energy of new things, the better you'll be able to support your clients to navigate new things with inspiration, energy, and curiosity



Four Phases in a Project

Visioning Initiation Planting

You almost always begin in the mystery



Change is a process



Starting something new

Also means letting go of something old



When a client is resistant to visioning

- Help create awareness
- Normalize it
- Explore it
- Support the client to build resilience
- Lean into strategy to bridge the gap

Sacred Depths

Strategizing



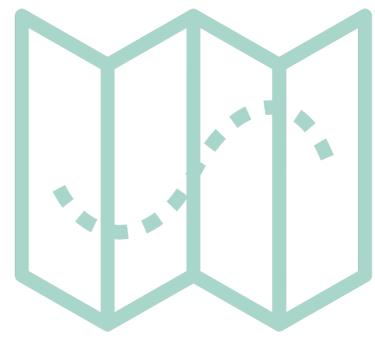
What is a Strategy?

A strategy is a plan for advancing a goal or a vision

Strategizing means co-creating

- a plan
- a pathway of action
- or a series of next steps

to support your clients to execute and follow through on their vision



translates vision into inner & outer action



Components of a Good Strategy

#1: Strong Container

- Clear goal (steps on the pathway)
- Due date for the goal
- Guiding feeling
- Baby steps needed
- Daily or weekly habits
- Built in markers or celebrations



Natural Rhythms

Different People have Different Rhythms



Consistent Doer

Day-by-day, week-by-week



Tipping Pointer

Marinate; once clicks into place, they take action



Sprinter

Tackle a lot all at once; then take a break



Deep Thinker

Invest time to process first

Sacred Depths

Systems and Protocols





Coaching Systems and Logistics: Beyond the Documents



When you coach, the container starts to get created well before the first session.

A Strong Container

The bigger concept behind creating, executing, and upholding your systems is about the energetics of holding a strong and powerful container for the coaching relationship.

- The documents that make up your systems create clarity and confirmation around expectations in the coaching relationship for both practitioner and client. This, in turn, creates a sense of safety.
- There is a sense of peace, safety and reliability when all parties know and agree upon expectations. Also, when those expectations are reinforced throughout the relationship.
- The clearer you are from the beginning, the less misunderstanding and confusion there will be, allowing everyone to settle in.
- Contracts and welcome packets are a big part of starting off powerfully. Use these documents to get clear about the practitioner's responsibility versus the client's responsibility.

A strong container helps promote trust, vulnerability, appreciation and forward movement.

Healthy Boundaries

Having healthy, aligned boundaries is either really challenging to set in the first place or to reinforce if a policy is not honored.

Warrior Woman Archetype

- Activating the Warrior Woman archetype is needed if having issues with boundaries
- The Warrior Woman is the one who knows how to set healthy boundaries.
- She knows how to serve deeply and well without taking over responsibility for others.
- She is the one who knows how to not let people walk all over her or make her a doormat.
- She also understands her own limits and what is important for her. She respects others while she respects herself.
- She knows how to be lovingly fierce when it comes to upholding boundaries for herself and for others.

Reasons you may struggle with boundaries

I. You're skilled at over-giving

- You may also consistently take over-responsibility for people in yur life.
- This might look like needing to be in control because you don't trust other people to take care of things, get things done, or take responsibility for themselves.

II. You're scared you'll be alone or unloved

- This is almost always at the core for anyone who struggles with boundaries.
- The core wound of the undeveloped Warrior is the fear that you'll be alone if you aren't over-giving or taking responsibility for everything.

III. Fear of not being good enough

This can look like:

- A tendency to go over session time because of feeling like you haven't given enough.
- May send out a contract but feel scared to ask client to sign if they delay signing it.

IV. Scared either of another person's anger or of your own anger

- This one shows up especially for women.
- Generally speaking, in society, we are not taught how to properly manage our anger. We are not taught that anger is a natural emotion that comes up for all human beings. Instead, we are taught in subtle and not so subtle ways to ignore, avoid, or fear anger.
- The result of fearing anger is we try to over accommodate others instead of setting and upholding boundaries.
- Or, we try to cover up our own anger by over-giving (this is less common but can show up).

Deeper Dive

Write yourself a letter from your highest-level warrior and see what she has to say to you.

Journal Prompts (from class)

- Why do you struggle with setting boundaries with clients (or colleagues, friends, or family members)?
- What's the impact of not setting or upholding boundaries on you? Your energy? Your business? Your relationship with the client?
- How have you thought your over-giving has been serving others? Think of ways you've believed to be true.
- What might the benefit be for your client if you were to uphold your boundaries and not over-give or take too much responsibility.
- Are there areas in your life, where you have a fear of being alone in one way or another?

Journal Prompts (deeper dive)

- What was your initial reaction to the idea of putting systems in place within your business?
- What is your overall relationship to boundaries?
- This week notice how often you ignore or compromise your boundaries, in big or small ways. Get curious and see if you can identify what is underneath this for you personally?
- If you work with clients (or observe in personal relationships) where do your clients have trouble with boundaries in their own lives? What type of support do you clients need from you around boundaries?

Suggested Materials

Before First Session

- At end of Enrollment Call, let the client know what's coming next with the items that are coming their way. Schedule first call and take payment at the end.
- A Welcome Letter to celebrate and affirm the choice to work together.
- Contract wait to start coaching one-on-one until the contract is signed.
- Via email, give client an opportunity to schedule out all of their sessions [Scheduling Template]
- Welcome Questionnaire include personal information questions like phone number, mailing address, birthday, etc.

While Working with Client

- Progress Report form before each session
- Half-way Progress Report or a mid-way call (if coaching package is 6 months or longer)
- Next Steps call when nearing the end of your time together

Ending/Closing Container

- Ending is just as important as the beginning.
- Offer client an opportunity to share what they will remember or are taking with them from the work you've done together.

At Home Work

- Start working on putting these forms in place.
- If you have them in place, go back and review



Client Scheduling and Re-Scheduling Templates

Scheduling e-mail template to be sent after contract is signed

Subject: Time to Start Scheduling Your Private Sessions

Dear < NAME>,

Now, it's time to take care of scheduling your private sessions with <COACH NAME> - yay!

We will be scheduling your program out in full. This will create a strong and powerful framework and container for the work you'll be doing with COACH NAME. You will be scheduling your sessions via TimeTrade in order to make things as smooth and efficient as possible for everyone. This means that you will have direct access to available time slots on COACH NAME. calendar and can choose and confirm your own slots. Of course, I will still be here to assist you along the way if you have any trouble or need any additional support.

Here is the calendar link to begin scheduling. Please note that you'll need to click on the same link each time you want to confirm a new session:

<INSERT SCHEDULING LINK>

We ask that you complete all of your scheduling by <DATE</pre> [ONE WEEK AFTER EMAIL IS SENT].

After we see that you have completed your scheduling process, we will send you your fully confirmed schedule for your records.

And, of course, you can always reschedule a session if necessary – just please give at least 24 hours' notice and we can take care of canceling your session and sending you a rescheduling link.

Looking forward to a wonderful year together!

My best,

<CLIENT CARE COORDINATOR NAME and SIGNATURE>



Scheduling reminder e-mail to be sent 3 days before due date

Subject: Scheduling Reminder

Hi there!

SO glad to see that scheduling is underway! Just wanted to send you a quick reminder to get all of your sessions up on the calendar by <DATE> so we can be sure you're all set. Once your sessions are scheduled, I'll be sending you a document with your fully confirmed schedule for your reference.

Please let me know if you need any assistance or have any questions at all.

My best,

<CLIENT CARE COORDINATOR NAME and SIGNATURE>

Confirmed schedule e-mail to be sent when all scheduling is done

Subject: Your Fully Confirmed Schedule of Sessions

Hi <NAME>,

Thanks so much for getting all of your private sessions scheduled promptly! A Word document of your full schedule is attached to this e-mail for your reference and I've also copied it below.

Please note that all times I've listed are in <ET>. And remember, if there's ever a need to reschedule a session, just reach out to me directly so we can be sure it's cancelled correctly in TimeTrade and can go ahead and send you a rescheduling link.

Looking forward to a wonderful and productive year!

My best,

<CLIENT CARE COORDINATOR NAME and SIGNATURE>

Response to be sent when client requests to cancel and reschedule a call

*Either cancel appointment directly in TimeTrade account and send cancellation notice to client through TimeTrade, being sure to check the option to include rescheduling link OR send e-mail below:

Hi <NAME>,

Thanks so much for reaching out to let us know you can't make the call.



Of course, it's my pleasure to support you in rescheduling that session.

First, please be sure to remove it from your calendar. We have cancelled it on our end.

Next, please use this link to schedule a makeup session at a time that works for you:

<INSERT SCHEDULING LINK>

My best,

<CLIENT CARE COORDINATOR NAME and SIGNATURE>



New and Continuing Client Welcome E-mail Templates

Note to be sent along with Contracts via EchoSign

Hi <NAME>,

Hope you're doing well! All of us on the <BUSINESS NAME>Team are just thrilled that you'll be joining the/continuing with <PROGRAM NAME>!

Attached, please find your program Contract and Policies and Procedures document. In order to secure your spot in the program, please sign and return them within 48 hours.

Once we receive your signed materials, we'll go ahead and send out your full welcome packet and start scheduling your sessions.

Please let us know if you have any questions at all.

The <BUSINESS NAME> Team

General welcome e-mail to be sent out with Welcome Packets once contracts are returned

Subject: Your <PROGRAM NAME> Welcome Packet

Dear <NAME>,

Thanks for getting your contract in promptly! We are thrilled that you'll be stepping into/continuing with the <a href="https://www.energy.com/reserved-new-continuing-new-

As promised, here is your Welcome Packet. In it, you will find an Introductory Questionnaire, an Accountability Prep Form to fill out before each of your coaching calls, and a Schedule of Important Dates.

The answers to the Questionnaire should be returned to me at <E-MAIL ADDRESS> as soon as possible.

If you have any questions at all, please don't hesitate to ask!

My best,

CLIENT CARE COORDINATOR NAME and SIGNATURE



Re-Sign Templates

Template to Schedule Next Steps Call with Client at End of their Program

Hi <NAME>,

It has been such a joy working with you over the last <X> months and witnessing all of your growth and progress. I am so excited by all you've created so far, and all that is next for you.

I wanted to reach out to schedule a special complimentary 40-minute Celebrations and Next Steps call. On this call, we'll have special time together to reflect on your progress, celebrate your successes, see what you want to create next for yourself, outline a plan for how to powerfully move forward, and talk about how <BUSINESS NAME> might be able to continue to provide support for you on your journey.

Let's schedule a call for the end of <MONTH>. You can use this link to find a good time on my calendar:

<INSERT SCHEDULING LINK>

I can't wait to connect for this special call.

My best,

Template to send after Next Steps Call is scheduled with Prep Q's for the call

Hi <NAME>,

I'm so looking forward to our Next Steps Call scheduled for <DATE and TIME>!

In preparation for the call, please send me your responses to these questions at least 24 hours before the call:

- Make a list of all wins, celebrations, forward movement big and small, inner and outer from the last <X> months. Don't be shy here. Think about where you were in <FIRST MONTH OF PROGRAM>, and where you are now, and what has changed for you.
- 2. What do you see for yourself in the future? What do you desire most?
- 3. What is the best support you sense you could receive from <BUSINESS NAME> with your future vision?

I'm so looking forward to celebrating together!

Thanks!



Prospect Scheduling Templates

Template for first e-mail invite to schedule Activation Call:

Subject: Scheduling a Time to Connect

Hi <NAME>,

This is COACH NAME AND TITLE. I'd love to schedule our time to connect for your Intuition Activation Call!

In our private, 60-minute complimentary call, we'll get clear on what you want in your work, what's been standing in your way of creating what you want for yourself, and how one of the BUSINESS
NAME> programs can help you get there.

I am excited to support you in getting clear on where you're meant to go next, and to create a powerful and insightful experience for you in our call.

<EITHER>:

Here are some available times I have for us to connect:

- DAY AND TIME 1
- DAY AND TIME 2

Please let me know if one of those works for you and we can go ahead and confirm it. < CR>::

Here is a link to my TimeTrade calendar where you can see my availability and book a time directly: <INSERT SCHEDULING LINK>

<OPTIONAL if in a very busy campaign and you want to bring urgency to scheduling>:

Please note that we have had a very high volume of applications. I am so pleased to be able to offer you a spot and very much looking forward to connecting, yet I do need to hear back from you within 24 hours or else I need to release the dates I offered you above.

I'm looking forward to connecting with you! my best!

Template for f/u email if no response to first (sent 2 days after first):

Subject: Reminder to Schedule and Activation Call

Hi <NAME>,

I wanted to follow up with you to schedule your Intuition Activation Call. I hadn't heard back from you, and I know life can get busy, so here's a reminder!

During the call, we'll get really clear on what you want for your soul-centered project, what's been standing in your way and how a <BUSINESS NAME> program can support you at a deep, deep level for growth and upleveling.

<EITHER>:

Here are some times I still have available for us to connect:

- DAY AND TIME 1
- DAY AND TIME 2

Please let me know if one of those works for you and we can go ahead and confirm it. If not, let me know some others that work for your schedule, and I'll do my best to accommodate you.

<OR>:

Here is a link to my TimeTrade calendar where you can see my availability and book a time directly: NSERT SCHEDULING LINK>

I am really looking forward to hearing from you!

All my best,

Template for when someone is a no-show to an Activation Call:

- 1. Call and leave voice mail first
- 2. Then, send an email as below.

Subject: Just checking in

Hi <NAME>,

I wanted to reach out to you about our Intuition Activation Call today at <TIME> as I wasn't able to reach you. Is everything ok? I know I heard from you on <DAY>, so I hope nothing happened to keep you from our call together.

Please reach out to let me know how you are. I'd love to reschedule a time with you so we can connect and help you move forward with your soul-centered work.



End-of-Program Template

End-of-Program Note to send when Client will no longer be continuing with a program

Subject: Personal Note from <COACH NAME>

Dear <NAME>,

It has been such an honor to serve you on your personal and entrepreneurial journey, and to watch your growth through our work together.

Please know that our door is always open to you and I hope that we will be able to connect and work together again soon!

I am wishing you much, much success and satisfaction in your work.

Much love,

<COACH NAME>



Please note:

We offer this template as a sample of a Program Agreement (e.g. structure, components to consider including, and suggested language) for a participant in a 1:1 program. A Program Agreement for group coaching will differ. The template is not intended to represent ideal or model language or to be used "as is"; if you have questions about formal contract language, please consult a legal professional.

We recommend being as clear as possible regarding the program components – see the "Your Benefits" section, below – as this will support clear expectations, creating a container and mutual commitment to the work together. In other words, the Program Agreement is part of creating the container.

Joanna Lindenbaum International Inc. Program Agreement Private Coaching Program

In order to create clarity and for your experience to be most effective, we have some terms and conditions that we agree to together. You agree to terms as a participant of the program and Joanna Lindenbaum International INC agrees to deliver on what is promised.

This agreement between Joanna Lindenbaum International INC (herein referred to as "Company") and Client Name (herein referred to as "Client") confirms the terms on which you ("Client") has retained Joanna Lindenbaum International as your coach through a Program Name (herein referred to as "the Program").

TERM OF AGREEMENT: The effective date of this agreement is from Month, Date, Year for the duration of the program and payment terms.

YOUR BENEFITS: Company shall provide the following services to Client as part of enrollment in the Program (beginning **Month, Year** and ending **Month, Year**):

List each program benefit separately

COMPENSATION: Client agrees to compensate company for enrollment in the Program, as delineated herein below:

Specify specific payment plan.

Client Initials

PAYMENT TERMS: To the extent that Client provides Company with Credit-Card(s) information for payment on Client's account, Company shall be authorized to charge Client's Credit-Card(s) for any unpaid charges on the dates set forth herein. If Client uses a multiple-payment plan to make payments to Company, Company shall be authorized to make all charges at the time they are due and not require separate authorization in order to do so. Client agrees not to make any pre-chargebacks or chargebacks to Company's account or cancel the credit card that is provided as security without Company's prior written consent. Client is responsible for any fees associated with recouping payment on chargebacks and any collection fees associated therewith. Client shall not change any of the credit card information provided to Company without notifying Company in advance.

Client has independently evaluated his/her ability to pay the fee, in light of Client's financial position and circumstances, and verifies that it is able to pay the Fee and will not be unduly burdened by payment of the Fee. A \$30 late fee will be charged for payment not received, or unable to be processed, by each installment due date.

CANCELLATION POLICY: Client's purchase is transferrable. Should Client have to cancel enrollment, Client must advise the Company in writing, and receive a written response back from a member of the Company, 30 days before the start of the program in order to receive a credit for purchase.

After the Program has started, due to the high-demand and small availability of spots in the Program (and because purchase may contain digital files), Client's purchase and all payments become non-refundable. Client is responsible for the full fee for the entire course of the program, regardless of whether Client actually attends or completes the program, and regardless of whether Client has chosen a 1-lump sum or multiple payment plan. No refunds will be issued or monthly payments forgiven.

CALL PROCEDURE: Please be prompt for all scheduled coaching sessions and call Joanna at **[insert phone number]**. Sometimes Joanna may need an extra minute or two with a previous client. If she does not pick up right away, wait 60 seconds and call again. If you call a few minutes late, we can't guarantee you the full 45 minutes, however if Joanna comes to the session a few minutes late you will still receive your full time. Please give yourself an extra 5 minutes or so in case your session begins late.

CHANGES: If you need to reschedule a session, we need at least 24 hours' notice. If you have an emergency, we will do our best to work around it and make up the call. If you forget a call, we will not make it up. To reschedule a call, contact the JLI team at [insert email address].

OPEN COMMUNICATION: It is imperative to keep all communication lines open, clear and up front. Joanna will continuously ask you to show her how to best coach you. If she ever says or does anything that does not feel right, please bring it up. She will make it right and do what is necessary to have you be satisfied.

EMAIL COMMUNICATION: As part of your private program package, you have direct access to Joanna via email. You may email her at **[insert email address]** on any relevant topics in between sessions. Please note that any copy or curriculum review have a one-week turnaround time. All other regular emails have a 2-business day turnaround time, not including Fridays. There may be times when the response to an email is best discussed during a coaching session and Joanna will advise on that.

ACCOUNTABILITY PREP FORM: You'll be given an Accountability Prep Form to fill out and submit before each of your private sessions with. You can save this in your files and fill in the answers at your leisure or the day before your coaching session. This form will help you track your progress and improve the efficiency of your time with. The more you describe what you want help with on this form, the more help you'll be able to get. It works, and the more effort you put into it, the more you will get out.

SCHEDULING YOUR CALLS: All of your scheduling for your private calls will be done at the beginning of your program. This will create a strong and powerful framework and container for the work you'll be doing. Scheduling will be done via Joanna's TimeTrade scheduler in order to make things as easy and efficient as possible for everyone. In the event that you are having trouble scheduling your sessions, you may always reach out to our Client Care Coordinator at any time and she will happily assist you.

JOANNA'S VACATIONS: Joanna will always give you notice in advance of times that she'll be out of the office. During her vacations, Joanna makes an effort to "unplug" as much as possible and recharge her creative juices that she uses in her work with you. Therefore, Joanna is totally unavailable for email access during time off and emails prior to time off need to come in no later than the Thursday before her time off begins. Aside from specified vacations throughout the year, Joanna will also be out of the office for much of the months of August and December.

REFERRAL EXCHANGES: Many times in Joanna's coaching practice, she has had the opportunity to give clients information about another service that may be of help to them, and she is absolutely thrilled to do it. This happens often because Joanna gets to know a client's lifestyle and business situation intimately and becomes keenly aware of what their needs are. On the flip side, Joanna's clients regularly send referrals to her practice, as well. Being a referral-based business actually allows Joanna to serve her clients better because not having to prospect for clients gives her more time and energy to focus on her clients and their needs. If you overhear someone saying they'd like to dramatically improve their revenue and business success, please ask them to contact Joanna for a chat, free of charge, to see if she can help their situation.

EARLY CLOSURE: At Company's sole discretion it may be decided the Company and Client working together is not a good fit and the work together is not productive. Should this situation arise, Company will terminate this Agreement with five day's written (via mail or email). If Client has paid in full, Company will refund any fees paid based on a pro-rated basis per week of

unused time (which includes session time as well as retainer time). If Client is paying in installments, Company will waive any future payments. In the event that Client owes any fees to Company at the time of termination, Client will pay them immediately within ten days of termination. Furthermore, if a credit is granted, it must be used within 1 year or it will be forfeited.

SOLICITATION: Client understands that it is not permitted to solicit themselves, their services, their events or programs/products to other participants or Clients of the Company, while participating in the program.

PROGRAM MATERIALS: The materials and resources used in this program are the confidential and exclusive copyright and proprietary intellectual property of the Company. These materials are provided to Client by the Company and solely intended for Client's personal use. No part of these documents and/or resources can be stored, reproduced or transmitted in any form or by any means (electronic, photographic, mechanical, or any other medium), recorded, translated, or used to produce any derivative works without the explicit written permission of the Company, under signature.

INTELLECTUAL PROPERTY: All intellectual property, including Company's copyrighted course materials, shall remain the sole property of the Company. No license to sell or distribute Company's materials is granted or implied. This includes, without limitation, creations, works, devices, models, notes, notebooks, reports, documentation, drawings, images, audiovisual works, video files, audio files, podcasts, literary works, blogs, website copy, marketing copy, computer programs, software coding and inventions, work-in-progress and deliverables shall be the sole property of Company.

Program Content and Materials: Regarding the content and materials of Program, the content and materials are proprietary to Company and you are not permitted to share the mp3's, videos, PDF's, other intellectual property or any other form of content from the program. This includes sharing the program's content and materials on social media other than the designated Program Facebook group. All content and materials are copyrighted by Joanna Lindenbaum International, Inc. If you violate the terms of this section, Company reserves the right to terminate the relationship immediately, retain any payments that have been made to Company or its subsidiaries and take appropriate legal action to collect any damages your actions cause Company.

CONFIDENTIALITY: The Company will honor the confidentiality of everything discussed with the Client. The Company will not divulge that the Client is enrolled in a coaching program without the permission of the Client. The Client understands that information will be shared with Company coaches and other members of the Program in the context of supervision and group support as it relates to the coaching being done. The Client will also honor the confidentiality of everything discussed in the group and will not share confidential or sensitive information with anyone outside the program.

NO GUARANTEES: Company makes no representations or guarantees verbally or in writing regarding performance of this Agreement other than those specifically enumerated herein. Client accepts that, because of the nature of Company's services and extent of clients' participation in Company's exercise(s)/recommendation(s), the results experienced by clients significantly vary. Client accepts responsibility for such variance. Company and its affiliates disclaim the implied warranties of titles, merchantability, and fitness for a particular purpose. Company is not responsible for any decisions made by Client as a result of the services provided, or as a result of the Program, or of any consequences of those decisions.

COPYRIGHT: Client agrees that Company shall exclusively own, jointly and severally, all rights, title and interest, including copyright in, and to, the complete set of original Program recordings. Client waives all rights of copyright or ownership in any of the products in which Client's recorded voice appears, and hereby assigns to Company any such right, title, and interest in and to any such products. Company shall have the right, for any purpose, to use, adapt, change, delete from or add to such form and content, to combine all or any part of these original recordings with others, and to use the recordings for educational purposes.

RELEASE OF LIABILITY: Client understands that by using Company's services and enrolling in the Program, Client releases the Company, officers, employers, employees, independent contractors, directors, related entities, trustees, affiliates, and successors from any and all damages that may result from anything and everything. The Program is only an educational and/or training service being provided. Client understands that coaching is not meant to be a substitute for professional advice or treatment, or psychiatric treatment or therapy. Client accepts any and all risks, foreseeable or unforeseeable (including health and medical), arising from this training. This is a morally and legally binding agreement. By signing below Client and Company agree to the terms stated in this Agreement.

CLIENT SIGNATURE AND DATE:		
COMPANY SIGNATURE AND DATE:		



Please note:

Adapt this form as needed for your clients. For 1:1 coaching, we suggest considering including sections for:

- What do I want to celebrate? (Please list at least 3 items).
- What actions have I taken since my last session?
- What inner shifts have happened? What is my inner wisdom telling me?
- Current opportunities in my life include . . .
- At my next coaching session, I want to focus our attention on . . .

The Pre-Session Progress Form is an opportunity for the client to practice reflection and celebration, take responsibility for their process and actions, get clear on the focus for the session, etc. The Form is very helpful for session preparation as it is a process for the client to share "story" and context prior to the session so that the session is as focused as possible.

As you onboard a new client, make time to introduce and review this form as well to highlight how it serves the client.

Pre-Session Progress Form Template

Please submit responses to <e-mail address> at least 24 hours before each coaching session.

Name:		<u>I</u>	Date:

What is my BIG, Soul-Centered Goal for the next 12 months?

What are my current offerings? (Name, Format, Price)

What Marketing Actions Have I Taken This Month?

What was my last Major Marketing Moment? (Describe with date and results)

What are my next 2 planned Major Marketing Moments (date and describe)?

What do I want to celebrate since our last private session?

What action have I taken towards my goals since our last session?

What inner shifts have occurred/What is my inner wisdom telling me?

Growth Opportunities Available to You Right now:

I want to focus our attention during our next coaching session on:



Private Program

Welcome Questionnaire

Please take the time to answer the following questions and **email** your responses to our client care coordinator <EMAIL ADDRESS> several days before your first session. Don't think too hard, but answer from the place inside of you that *knows*. This information will be shared with Joanna so she can plan appropriately for your needs.

- 1. List 3 short-term goals you would like to work on during the first phase of your program with results for each. Keep these realistic with a bit of a stretch for you.
- 2. List 3-5 more goals you would like to work on during the next phase with results for each. Keep these realistic with a bit of a stretch.
- 3. What do you believe is CURRENTLY holding you back or slowing your progress (no knowledge of the right marketing, time management, stress, cash flow, too many responsibilities, confidence in self, fears, exhaustion, etc.)?
- 4. What is your biggest distraction or biggest fear that holds you back from creating what you want for yourself?
- 5. What marketing do you currently have in place? What is working well? What's not working so well?
- 6. Describe any major marketing moment you have planned for the next 12 months:
- 7. How many people do you currently have in your community (for example: newsletter list, FB community if it is active for marketing)?
- 8. Describe your current understanding of your ideal client:
- 9. Describe your current understanding of your Sacred Message:



- 10. Describe your current understanding of your Brilliance:
- 11. List your current offerings/services/products (Title, Format, Price, Start Date (if it's a group program) + how many currently in each program, and how many folks you'd like to see in each program over next 12 months):
- 12. What else do you want us to know about you for our time together? What will we need to know in order to help you most?



Accountability Prep Form

Please submit responses to Joanna at <EMAIL> before each coaching session.

Please call Joanna at <PHONE>

<u>Name:</u> <u>Date:</u>
What is my BIG, Soul-Centered Goal for the next 12 months?
What are my current offerings? (Name, Format, Price)
What Marketing Actions Have I Taken This Month?
What was my last Major Marketing Moment? (Describe with date and results)
What are my next 2 planned Major Marketing Moments (date and describe)?
What do I want to celebrate since our last private session?
What action have I taken towards my goals since our last session?
What inner shifts have occurred/What is my inner wisdom telling me?
Growth Opportunities Available to You Right now:
I want to focus our attention during our next coaching session on:



Energetics



When?

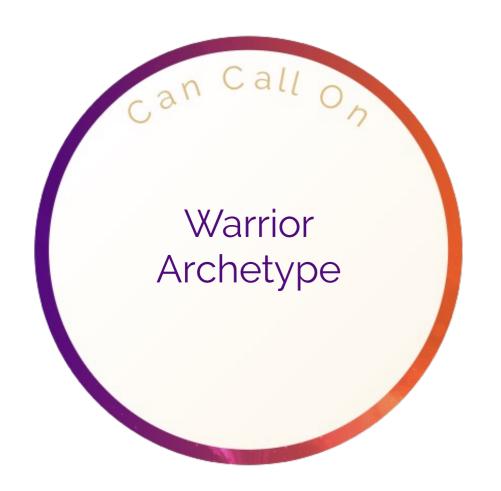
Container-setting begins BEFORE the first session



- Sales Process
- Contract / Coaching Agreement
- Welcome Packet
- Scheduling

Healthy Boundaries

Healthy & aligned boundaries support us to serve deeply without taking over-responsibility



What could get in the way?

- Over-giving
- Fear of being alone, unloved
- Fear of not being good enough
- Scared of anger (yours or another's)