Certified Money, Marketing and Soul® Coach Training Program

Training Call #10

September 20, 2016

Kendall: Today is Tuesday, September 20. Thank you for being here. This is CMMS Call 10. I have so many favorites with CMMS. This is one of my top favorites.

Today's topic is Coaching Business Best Practices. We have a lot we're going to cover today. Definitely grab your notebook and your notepads and take a bunch of notes.

As we get started, I definitely want to hear some successes. I know you guys have been busy on the Facebook group asking questions, looking at your guarantees and helping each other with your buddy coaching. That's awesome.

Our next call is on Tuesday, September 27. That's next Tuesday. We do not have a call on October 4. That's a catch-up week for you that we designed in. I think that takes care of announcements.

Suzie, do we have a success to share?

Suzie: We sure do. We have Eleni.

Eleni: Hello, everyone. This is part success and part fun story that I had to share with my CMMS goddesses.

I was at a business conference last month, and there was a slew of vendors there. Since then, I've been getting phone calls saying, "You stopped at your booth. We want to know if you're interested in our program."

I literally just got off the phone with one who was really pitching their program and wanted me to buy their product, but I remembered the couple of times where you taught us just to use questions in the conversations.

I kept asking him about why he works there and what his work was. He does have his own coaching practice. I started asking him about his clients, and he ended up telling me about these women that he works with that have money issues and he's not sure how to help them.

Being certified "All Things Kendall" with your two amazing money programs, by the end of the call, he said he wanted to talk to me and send me a proposal about me working with some of his clients. I didn't buy anything from him.

Kendall: That's great. I love it. Eleni, every time you go somewhere to any type of a conference, you always pick up a client, usually on the airplane. This is great.

How did it feel to only ask questions?

Eleni: It was very empowering. I was very much in the driver's seat.

Kendall: We're going to talk about that a little bit later on in today's call as well with one of the Coaching Best Practices. That's fantastic. Congratulations, Eleni.

Eleni: Thank you.

Kendall: You're welcome. Do we have another success?

Suzie: We sure do. We have Leslie.

Leslie: Hi, Kendall. I just wanted to share. First of all, as you know, I'm immensely enjoying the course. I have my makeup courses. I find that people take the classes and then they dwindle off.

Out of this course, what I've done is created a mentorship program. It's once a month, and it is from 6:30 p.m. to 9:00 p.m. I have a selected group. We have a max of 12. I already have 10. I just launched that about three weeks ago, and our first day is going to be tomorrow.

That has just completely shifted the dynamic of the roles that are actually in the mentorship program.

One of the things that I also did was use your technique to have a discovery session included before they start the course. I wanted to say that keeping my timing on making them accountable and more disciplined, and keeping that 30-minute discovery conversation, I've kept it very on point, which I love. I'm keeping it a little more disciplined for me as an artist as well.

I've also created a program that is not only artistry driven, but half of the girls want to start their own businesses. One of the things I've learned from this are some of these sections that I'm doing with you. Probably not this week or this month but the following month, I'm doing the art side as well. I think they're going to really love that.

Kendall: Being creative women, they're going to absolutely love this. They're going to love it.

Leslie: I've already done it with my employees, and they loved it. It really created a different dynamic, and it allowed me to see where the focus was for each one of them to have the right people in the right position. It's been very exciting.

Kendall: Congratulations all the way around.

I know this is true for me when I go to any type of workshop or a mastermind. I was in a mastermind that I was invited to attend last week. We get the value of what the host is delivering. That's the extrinsic value, but there's always an intrinsic value to being in a course or training, especially a comprehensive training like this. It starts to change how we show up. It gives us new ideas in our business.

Congratulations to you, Leslie, on your group. That's awesome. I'm excited for you. I'm excited that you're seeing ways of implementing what you're learning. That's incredible.

Just a quick note for everybody, next week's call is a Q&A call. It's a great chance for you to bring your questions. The whole call will be a question-and-answer call, or a mentoring call with me. That's what it ends up being.

I don't have a firm date in front of me, but by early next week, we should be giving you the recordings on how to write discovery session bullets to promote your discovery or your strategy sessions and also ways of integrating CMMS into your discovery sessions.

You'll be getting that in the next week or so. You'll get that as a recording rather than as a live call with me. That way, you get that in addition.

I want to dive in. I think we could take a whole call just to do celebrations based on who you are and the energy of this particular group.

What I'd love for you to do is to jot down right now something you're celebrating. We can do a little self-acknowledgment here. Jot down something that you're celebrating, and you can post it on the Facebook group after the call. That's great.

I just want you to pull out, acknowledge, recognize and give yourself that credit for something that you've accomplished, a place where you stretched or something that you tried that was brand new.

Even if you're trying something new and it doesn't always work out exactly how you planned, that's okay. There's still something to celebrate in there, something that you learned that you'll do differently the next time or something that you completed. Write down an acknowledgement for yourself.

With that, we're going to dive into the Best Practices Toolkit. I'm going to give the page number. These are the original page numbers from the workbook as it looked in June. The page numbers may have shifted by one or two numbers, so just be aware of that.

That section starts at Page 143, and that is an arrow bullet list. It says "Coaching Business Best Practices" at the top. Let me run through this page very quickly, and then we're going to dive into the real meat of this.

The first three bullet points on that page are items that we already covered in the live training, so I'm not going to go back through those today. If you have questions about them, you're certainly welcome to ask me questions as we have time today and next week.

Briefly, they were about how to set up your coaching calendar. There's a sample calendar in there. I really want to emphasize this.

This is something that I did very early in my coaching business, and the reason I did it was because I was at loose ends. I was feeling quite lost with what to do with my time. I didn't have any clients or just a few clients.

I immediately created a template for my day, or really a template for the week, and then a template for the month.

We still use this schedule to this day. We still operate from the same basic schedule. What I love about it is it gives you a lot of freedom. It makes it to where you're really only coaching clients a few days out of the whole month.

I want to really make sure that, if you've heard it and you liked it, but you didn't implement it, this is the time to implement a really great template.

The other piece was how long to make your coaching sessions and freeing up your time.

The third bullet here was the six-step template. That's the coaching call template that you have been using.

The rest of what's listed here, we're going to go through it, except for the very last one, Powerful Ways to Keep Your Clients Accountable. That one we already did in the live training. The first three and the last one, we already covered, and we are going to dive into the next pieces right now.

We're going to go through these in the order that they appear in your workbook to make it really easy. We're not going to be jumping around. We're going to go through this in sequence.

Go ahead and flip forward a couple of pages so that you're on the page that says "Getting Started Client Form." In my workbook, that's Pages 146 and 147. It's a two-page form.

Keep in mind that we purposefully don't make this super pretty. It doesn't have a lot of graphics. It doesn't actually have any graphics on it. I would highly recommend that you brand this form. You can make it a lot prettier. What I care about is giving you the content.

Let me talk a little bit about this form. If you have a question, jot it down. I'll stop every section or so for questions about that section, but let's do it section by section, because I may well answer your question just in the sharing of the training that I have for you here today.

Jot your question so it doesn't get forgotten. If it doesn't get answered automatically, you can ask me during the breaks.

Here's the philosophy behind this form. It's like taking a snapshot of where your client is when they start with you. This form is worded so that you can give this to the client. This is a form you would give to the client. You would have them compete it and send it to you ahead of time.

For example, they could send it ahead of their kickstart session. You could also walk them through it on the phone as their kickstart session.

My preference is to give it to them as an assignment, because it helps your client start to look at themselves and their business and see it with fresh eyes.

To be clear, the Getting Started Client Form is one that you wouldn't use session after session. It's used one time when they first start with you.

You can also use it or modify it slightly to use when a client re-enrolls with you. For example, if they're in a 90-day program or a six-month program, I would encourage you to still have a snapshot of where they are.

I do this every year with my year-long Diamond clients. We always reassess where they are even though they've been coaching with me for a long time.

It's a two-page form, and what I want to point out to you is at the bottom of the second page. You'll see that we sectioned off a place where there are action items. This is where you're asking your client to identify what they want coaching on during your coaching session.

This section is meant to be done with you on the phone. It's like a going forward section. It's not something they will have filled out prior to getting on the phone with you for their kickstart session.

The main energy that you want with this Getting Started form is you want them to feel excited, and you want them to have some ahas.

The purposes of this form are these four things, and you'll want to jot these down.

Purpose 1 is to get to know your clients.

Purpose 2 is to look for any holes, blind spots or complexity in their business. It will jump out at you pretty clearly.

Remember, you're intuitive. If you're feeling overwhelmed when you read somebody's form, it's probably because they are being overwhelming.

There's nothing wrong with you. Your intuition is telling you, "This is a lot. I'm confused." That's okay. Your job as a coach isn't to be perfect. If you are feeling confused or overwhelmed, that means that they are too, and you can help them sort that out.

I can't point out any one question that tells me about complexity, but I do think that Questions 3 and 4 are definitely the main indicators to me of complexity. You'll see when people list a whole bunch of stuff.

That brings me to Purpose 3 for this form. Look for lack of synergy or flow between their offers. Again, this is going to be pretty obvious.

There isn't an exact formula for a perfect way that a business looks, and it's going to change depending on the kind of industry of your client.

Basically, what I'm looking for is does one product or program that they offer create desire or naturally lead to another one? It's either a logical sequence, or there's a need that's created.

For example, I think we created VIP Day first, and then we created Discovery Session Secrets. Actually, the very first one was my Platinum Style Program. That was the very first high-end, home-study course that I created back in 2008. I'll be training you guys on that in a couple of weeks.

A topic like that, like high-end programs, opened up the opportunity for me to teach about VIP Days. Both of those topics opened up the opportunity for me to teach about discovery sessions. That's just one example of how one thing opened up an opportunity for something else.

When I'm looking at a client's Getting Started form, I'm looking for if there seems to be any kind of flow. Very often, the answer is going to be no. You're not going to see a flow. You're going to see stuff that looks really hodge-podge, and that's why they hired you as a coach to help sort that out.

Purpose 4 of this form is to look for boundary issues. Look for competing priorities with their time. On the second page of this form, Questions 8, 9, and 10 are really going to point that out for you.

The one question I do want to point out, and I love this question, is Question 10, "How much time do you spend each day marketing your business?"

You don't have to be a marketing expert, a product launch expert or a digital marketer to really help people powerfully with their marketing.

The reason this is such a great question is because a lot of people will write that they market an hour or two a week. Then you look at their goal, and their goal is to create a $100,000 business. Marketing an hour or two a week and wanting to create a $100,000 business, good luck with that. Those things don't go well together.

After certain things are in place, and if they're using a lot of digital marketing, it's possible to do it in an hour or two a week, but even that's pretty slim on time. That person is probably not going to reach their goal, and something has to change.

When you ask someone how much time they spend each day on marketing, it will start to tell you a lot about what their priorities are. It will tell you what kinds of demands they have on their time or what kinds of things they fear.

That's going to be really helpful. I really do believe as coaches that, a lot of times, the biggest benefit our clients get from us is that we help them do the things that they know to do but are just not doing on their own.

It's not like we're being taskmasters here. It's just mirroring for them that they say they want to grow their business and they want to reach a certain income. You want to find out why that's important to them. What's the emotion behind it?

In helping them organize their priorities and put into place some great boundaries, they will increase their business. They will also increase their sense of self-respect and self-worth, and they will step up as a leader of their life and in their business.

Here are a couple of last tips. I'm spending a little bit more time on this form than I will on the other pieces, but there's so much that goes into this form. It's not just a bunch of questions.

What I suggest you do here is to dive deeply into all of these questions. You can have a kickstart session be nothing but going through this form, even if they pre-filled it out for you.

All you're doing is going through each of the questions that they've already filed out. You're asking more questions and getting more insights. You're going to find out a ton about your client.

I tell my clients this at the beginning of their kickstart session. I say, "We're going to go through this, and as we go through it, I'm going to be hearing things that I know that we'll need to look at. I'll be hearing opportunities, and I'll also be hearing places where you have a gap in what you're doing or where you're missing out on opportunities. I'm going to make a list of those as we go along."

I'm very clear with my client in telling them that I'm going to listen to what they can't see for themselves. As I go through the form with them, I make notes on my note sheet of what their opportunities and gaps are.

That is how I write it. I write "opportunities and gaps," and sometimes, the distinction between the two is not crystal clear. It's not that important to me, so I don't get too worked up about that.

I share it with them. As it comes up, I'll say, "Wow, that really sounds like an opportunity here."

I'll give you a quick example. I have a Diamond client. I remember, when her year started last year, she had an opportunity to do some joint ventures. I said, "Tell me a little bit more about that."

She started talking about this and about building her list. She loves doing joint ventures. It turns out she had a lot of opportunities.

I said, "This sounds like a huge opportunity for you. Let me go ahead and write that down."

You may hear a gap. I'll say, "Wow, that sounds like a gap."

Let me give a quick example. Let's say somebody doesn't have any team, and they're doing everything themselves. You hear that they're really struggling with juggling everything.

I'll say, "It sounds like there's a gap here. For you to reach the income that you want and to have the free time that you want, you need some help taking over some of the basic administrative tasks or household tasks." I usually have them start with household tasks.

I say, "Take those over, because you have gap between everything you're doing and where you want to be with your business." They'll say, "Oh, that's so true."

Very often, I may then ask them, "Tell me. If you had somebody taking over some of those basic tasks for you, what would that free you up to do? What would that be like for you?"

I'm not necessarily coaching them entirely on how to hire somebody and which tasks. I'm not getting into all those mechanics in that moment.

What I am doing is connecting them to what's possible so that they start to emotionally buy in to making this type of change. They get pretty excited about it. It's really painting quite a lot of possibility.

I think the main thing is that you're really diagnosing here. You're not giving remedies yet. You're not prescribing. You're diagnosing. You can already have an idea of what the prescription may be. Hiring an assistant is a prescription, but you're not going through any of the detail of it. That's going to come in the future.

If you start to dive into solving those things for them in a Getting Started session, the session would be two days long. You'd never get through it.

What I have in my notes is that, at the end of this session, you could potentially have a very big list of gaps and opportunities, and that's what you want to save time for at the end of the session.

It may come up organically during the session, but you want to chunk it down into that number one opportunity for the next 60 days and the top three priorities. That's where that comes from.

I love the 60-day timeframe. It fits so beautifully with Bold Money Goals. I love it because it's a time period to get things done without losing energy. It's just long enough. Longer, and people start to lose energy. It's still enough time to do some course correcting. I like it because every 60 days you get to press reset.

Let me stop here and see if anybody has any questions about this particular form. I went into a little more detail than we will with some of the other ones on this. Let's give a chance for any questions here.

Suzie: We have a call from Sandy.

Kendall: Hi, Sandy.

Sandy: Hi. How would you work with this form? I've got some people. One woman, for instance, is in my Platinum program. She has been retired. She is starting up a healing practice with animals and people.

She doesn't have to generate income, and she's at the very beginning of this. She doesn't have a list. She doesn't have money goals. She's just starting to think about charging and what she wants to actually create. She's really at the pre-stage.

Kendall: What is she going to be doing as a service?

Sandy: One of the things she wants to work with is end-of-life care, but she also does energy healing of animals as well as people.

Kendall: I wouldn't change the form for clients. The form is the form. The form needs to fit you as the coach and how you want to start taking the snapshot of what's going on for a client. I wouldn't customize it to her. If she's representational of a lot of your clients, I would look at changing the form.

There's a two-part answer to your question, Sandy.

The first part is that the form starts to activate your client's thinking, especially somebody like that who is at the very beginning.

A lot of you may be coaching people who are brand new in business. These concepts that we talk about in the coaching world all the time are completely foreign to them.

You're waking them up. That's what I mean by activate. You're awakening them to say, "I don't know about a list. Should I be thinking about a list?"

I wouldn't get into the energy of "I don't have a list." That's a totally different energy. It sounds defeated. It's like "I'm never going to have that." No, you want to think about cultivating your list.

I have one client. She's been with me many years. I love her to pieces. The words growing a list or creating a list don't really work for her. It's not motivating. It just sends her into not a good, resourceful place.

We have a different way of phrasing it. I think we call it her love list, actually. That's what we ended up calling it. She works with corporate, but that's what works for her.

You might have to find a different word that's meaningful if the client really can't connect to the business language. That's okay.

Here is the second piece of this answer when you're working with somebody who is new. There are people out there where the money is not motivating. It's not their primary desire. I would ask her, though, how she wants to measure success.

I would be listening and coaching her to create measurements of success. She's probably going to naturally go into some feeling words and feeling phrases, and that's fine, but I would also ask her for two or three measurements, something that can be measured.

Money can be measured. How many clients can be measured. How much you're charging can be measured. Here's an easy test. We want something that can either have a number, a dollar sign, a percent sign and/or a date.

I would be coaching her to have some measurements and to keep connecting those to why doing this is important to her. Otherwise, she's paying you a lot of money for a hobby.

Who knows what her motivation is for doing this? It just depends on her personality. She may never be a high achiever compared to other people, because the money isn't there as a motivator. However, it doesn't mean that she can't do great work and have a real impact for people. How does she measure that impact?

Anybody else have a question?

Suzie: We have Tabitha on the line.

Kendall: Hi, Tabitha.

Tabitha: Hello, my dear. My quick question popped up when you mentioned Question 10, how much time a day they spend marketing their business. What would be a guideline for that?

I've had clients ask me, "How many hours do you expect me to have to invest a week in that?" I think, "Oh, shit, I don't know what to tell you."

Kendall: The way they frame that question is already not good. "How many weeks do you expect me to have to put into this?" doesn't sound great.

It depends on what kind of business they want to have. I can't give an exact answer, because it depends.

I'll use the $100,000 mark. Somebody wants to have $100,000 of revenue a year, and they only want to work two or three hours a week marketing. I'm not going to say it's not possible. It is possible. I think, initially, it's probably not realistic. They would have to be incredibly focused and highly leveraged in the activities that they're doing.

What I usually recommend is this, and this is what I did when I first started. I made this strategy up and then I saw other people doing it as well, which was affirming.

I looked at how many hours I wanted to be working in total. I don't remember what it was back then, if it was five hours or eight hours a day. I don't remember.

I figured out, as best I could, how many hours I wanted to spend serving clients. I think I was spending three to five hours a week marketing in addition.

With the time I had allocated for clients, if I didn't have clients, I spent it marketing. I was very disciplined about that. I figured if I don't have paying clients filling up that time, then I'd better be filling up that time getting paying clients. That was the mindset I had.

The other piece that's important is consistency. There are different ways to do it, and some of this depends on a person's personality. I know there are coaches out there who teach and say, "One day a week, you're going to do all these outgoing calls. It's just one day a week, and then your marketing is done for the week."

I'm not saying that doesn't have value or merit. It does. I don't know that it would produce enough volume to create enough new clients, especially when you're brand new. When somebody is new in their business, there's energy that has to be put into it.

I would rather see somebody do it where they have one day where they can spend three hours. Say, on Monday, they can spend three to four hours, on

Wednesday, they can spend two and on Friday, they can spend two. They really start to create the habit and the pattern in their weekly template of marketing.

There are a lot of different answers. I can't give you an exact answer like, "Every three hours of marketing will produce $20,000 in results." It just doesn't work that way. I wish.

Does that help you at all?

Tabitha: Yes, that was actually really helpful. Thank you.

Kendall: Which piece was most helpful for you, Tabitha?

Tabitha: It was this big aha click. It makes so much sense to set aside the hours you want to work. How many do you want to work with clients? If you don't have clients, get clients. It works so well.

Kendall: That was something I figured out really early on. I said, "What else am I going to do with myself? I'm not going to just sit here and wait for the phone to ring."

I think that, when all of us are looking at how much time is being spent marketing, the truth is the things that a person will do early on may not be the same things later on in their business that they'll do.

I'll give you a quick example. I used to do a lot of networking. If people live in a city where that is going to be useful for them, I think networking and speaking locally is a fantastic way to hone in on our messaging, get practice speaking, get practice talking about what we're doing and get clients, but it's not highly leveraged. A person can end up spending a lot of time.

I might sound like an old lady here, but 16 years ago, that's actually what drove me into the internet. I always had an interest in it anyway, but I just naturally gravitated toward leverage.

There are a lot of ways you can apply leverage even with speaking. I think we've talked about this before.

When we went through the Money Tracking Sheet, on the right-hand side, there's a place to set a goal and then the actual amount of how many people you're in front of when speaking. You can apply more leverage.

At first, the goal is three bodies in a room. That's awesome. Then the goal might be 15. Then the goal is 30 and then 80 or 100.

You step up your goals and you apply more leverage as you get more experience, and you start to really hone in on your messaging and who your ideal client is.

That just comes with time and a heck of a lot of visibility being out there in the world and stumbling, falling, getting up and trying things. I think that is an incredibly useful period of time in getting specific on who we are and what we stand for in our business.

I'm going to get off my soapbox here.

Tabitha: Awesome. I love it. Thank you.

Kendall: Suzie, do we have any other questions, or should I move on?

Suzie: We have a written in question. I don't have a name. It says, "To clarify, is this form used after a client has signed on for a program and then used as a Getting Started strategy to open up possibilities and identify holes?"

Kendall: Yes to everything. Really, the form ends up being a framework that you can use for your kickstart session.

Keep in mind, and this is a really important point, it is very likely that the holes, gaps and opportunities that will come out of this kickstart session using this form may go far beyond the scope of the program that they've signed up for with you. That's okay.

For all of you who love to over deliver, for all my little over-delivering goddesses, this is not a permission slip to try to squeeze it all in.

You can say to the client, "I'm your coach for the next six months. I can be your coach for longer than that, too, but our initial package is for six months, and what you've given me here is at least a year, maybe a year and a half's worth of opportunities and gaps to coach on."

They'll laugh, and you'll laugh. You can say, "Let's chunk this down and prioritize what we're going to be focused on starting with the next 60 days. Know that, beyond these six months, I'm available to you."

Right there, it's an opportunity for you to start seeding. Clients will sometimes think that, if they sign up for 90 days or six months, then they're done and they can't continue with you. It's the weirdest thing. You think, "Really? You thought that? No, we can continue." This is a great opportunity to make that clear.

My recommendation is that you set the expectation in the beginning. Otherwise, you're going to be really sorry that you didn't.

Let's keep moving on. The next page is the Coaching Call Prep Form. This is also a form that you can give to your clients.

It's up to you if you want to use a prep form. I will tell you that clients who fill one out generally get better results. I think part of that is just because in the filling out of a prep form, they start to get clarity. They get clear about things.

I know, when I've had coaches who required me to fill out a prep form, I got clarity. By the time I was done with the form, and sometimes I'd fill it out a couple of days ahead of time, magically the things that I wrote on the form I wanted coaching on got taken care of, so I was done. I had something else I could do with them. It was really cool. I felt a lot of value with the coach that way.

Whether you require it or not, what I highly recommend is that you are consistent. If you require it, then require it on every session. If you don't, then don't require it. That's fine.

You also want to be clear about how far in advance you want it sent to you and if you'll coach them on it if they don't send it in to you.

I'll give you a quick example. One of my Diamond clients loves filling out her prep form. I have to be honest with you guys. I don't require them of my Diamond clients, but I have one client who loves it. She fills it out and that's what works for her.

There was one time I didn't get her prep form, and I emailed her the morning of her session saying, "I don't have your prep form. Is everything okay?"

It wasn't that she had forgotten. There was something going on. It was a really great indicator prior to the session happening later in the day that something was up.

She told me, "A little bit is going on. I know we're going to be coaching." I said, "Great."

If you're requiring it or you have somebody who gives you one consistently and then they don't do it, I would bring it up.

I'll give you a different example. I was a client of a very high-end mentor for about a year and a half or so, two years maybe, and he did require the form. He asked for the form initially. I loved filling it out. It was great piece of accountability. It made me feel that the coaching was valuable.

Then he stopped commenting on it, and I got busy. I'm not proud of this moment, but I thought, "I'm not going to send it in," and he didn't say anything. I didn't send it in again, and he didn't say anything. We went for a couple of months, and he didn't say anything.

I have to tell you that I built a story around that, and it wasn't a good one. I ended up not renewing with him. The story was he wasn't that interested, he didn't really care anymore and I wasn't getting as much value out of the coaching sessions.

Richard and Kailash live and breathe by these forms. They love them. I don't know all the rules. Suzie, do you know how far in advance we ask for them with our private clients for Clarity?

Suzie: It's 24 hours before the call.

Kendall: If they don't get it, Kailash will email the client directly and say, "I don't have your prep form. Please send it to me."

If it's Richard, he has Laura, I believe, email them and say, "Where is your prep form?"

Richard and Kailash, who are both master coaches, have been coaching a long time, and they live and breathe by these forms.

I'm going to keep moving. Let me do a couple more around the whole coaching form section, and then we'll stop for questions.

The next one is the Coaching Session Note Sheet. Make a note that this is only for you. This is a form that's for you.

Everybody has their own style for taking notes. You can use software and type it in. If you do that, I advise letting your client know. Say, "I'm going to type my notes in, so you might hear the keyboard."

I have really sensitive hearing. When I'm a client, I hear somebody typing and they haven't told me that's what they're doing, it annoys the crap out of me because I think, "What are you doing, answering emails?" especially if they sound a little distracted.

It's funny. It's never happened with the women I've coached with, only with the guys.

What I wanted to do here was give you a format that you can use. I have played in the past with having one session per sheet, like what we're giving you here. I've played with having two sessions per sheet. I even played with having three sessions per sheet, but that was not enough room to make good enough notes. I like the one session per sheet.

I know Richard and Kailash take great notes. They refer back to their notes. They review their notes before the session. That's why they schedule their sessions with 15-minute breaks in between so they can do that.

As far as keeping the client information together, I personally do everything in three-ring binders with one tab per client. I put in their most current note sheet and prep sheet for my client who sends in her prep sheet. I put them on the top so the most recent is always on the top.

I know Richard does the same thing. I think Kailash uses folders per client rather than a three-ring binder. I have used folders in the past. I just really like a three-ring binder a lot.

We have one more form, and then we'll stop for questions.

Let me go back to something. When you're taking notes, it's okay to say to the client, "Hang on one second. Let me write this down." I do that all the time. I'll say, "Here's what I have written down from last time," or, "Hold on. Let me find that in my note sheet."

It's great that your clients know that you are taking notes and that you're using them. It's a demonstration of engagement on your part.

The Coaching Session Self-Review Form is for you. It is not for the client.

One of the strategies that I've used to get really good at any particular skill in a very short period of time is to self-review and to be pretty focused about what I'm working on improving.

I love this form, and I'll tell you why. Especially in the early days of my coaching, I would hang up the phone, and it's so tempting to say, "I didn't do a very good job," "I should have been more this," "I should have been done less of that," or, "I could have, should have or wished I had."

That is not confidence boosting. That's just ripping yourself apart. I found myself doing that. It didn't feel good, and it wasn't helpful in making me a better coach.

What I did was I created this type of self-review form, and I used it as a frame. Some of my sessions were back to back, so I would have to perhaps wait until I had a break or later in the day, but I always completed a coaching day reflecting on "What worked well for you? What worked well for your client? What felt most powerful for you? What was a breakthrough for you as the coach, and what was a breakthrough for your client?" That's really important.

The other thing is not exactly on this form, but what I used to do to get out of the "I could have been more this or less that" was I would choose a skill, like asking questions or reframing into the positive.

I would just pick different coaching skills that I wanted to work on, and all my clients experienced me that way that week. It was really fun.

It doesn't matter what they came to the call needing. They got what they needed, but I as a coach approached what they needed through the lens of whatever skill it was that I wanted to become more masterful in that week. That was really powerful, and I got really good really fast at a wide variety of skills.

Let me stop there. I've got some more to cover here, but let's go ahead and take some questions. Anybody have a question about these forms?

Suzie: It looks like we're good at the moment, Kendall.

Kendall: The thing that strikes me about these forms is that they aren't just forms, which can be pretty boring. They're ways to help you become more masterful in your coaching.

I always say that systems liberate you and free your time. They help you do that. They give you a system so that you're really free to be fully expressing yourself in your coaching with your clients.

Suzie: Kendall, we do have a question. It's Leslie.

Leslie: Hi, Kendall. I've got a question. If I understand you correctly, you bring what you want to master personally.

Kendall: I am deciding something that I want to bring to the coaching that week to improve my skills.

Leslie: My question is what drives you to having that dual focus? How do you have that insight? What could you share that can spark some of that insight to bring that level of discipline, inquiry or awareness to working with other people and constantly growing yourself?

Kendall: I'm going to have to make this answer fairly short just because of time. I love the question. I absolutely adore the question. My girlfriend and I were talking about this a few months ago.

I'm a person who's all about mastery. I just adore mastery, whether it's master of training my dog, teaching coaching, being a coach or my horses. Whatever it is, I'm just a very thorough, passionate person who adores mastery. I love being really good at stuff. It's fun. There's an innate motivator there that's just part of my personality.

I think that, on the dual side of that, I really couldn't stand how it felt when I would get off of sessions and feel like I hadn't done a very good job. It felt terrible. I didn't like it.

I didn't like the self-talk that it produced. I just didn't like it at all. It was uncomfortable. It made me feel not good about myself. It lowered my self-esteem. I'm not somebody who's willing to walk around feeling shitty about myself.

Leslie: I love that. I truly get that. That's why I'm taking this class.

Kendall: Because I'm not willing to walk around feeling shitty about myself, I'm going to do something about it. I'm a very practical girl, as you guys know, and I thought, "Let me chunk this down, and let me just look at this from the lens of pure skill. It's not artistry, just skill."

I would chunk it down and say, "Let me start focusing on this." I still do it to this day. I pick things that I want to improve.

We all get into habits. We slip into patterns, especially when you start having clients for long periods of time. It's like a marriage. There's a relationship that's created, and it's easy to get into patterns.

For one of my Diamond clients, leadership is really important to her. For most of my Diamonds, that's true, because leadership is a topic that I live and breathe. I know that leadership is about growing her business, but it's really helping her step forward and be more confident as a leader, to trust herself as a leader and see herself that way.

My personal theme with her is I make certain that, on every call, not that I'm teaching her something about leadership, but I'm helping her with her business and it's always through the lens of leadership. I'll say, "As the leader of your business," and I see it through that lens for her.

Leslie: Thank you. That's great.

Kendall: That was a really great question. Any other questions, Suzie?

Suzie: We're good.

Kendall: Good. Let's go on to what to do if clients cancel or show up late or unprepared. Clearly, this page is not for your clients. You're not going to give this to them. I'm going to run through these quickly, because the form itself is pretty self-explanatory.

First, you want to have a clear cancellation policy. This doesn't need to be posted necessarily. It's not like a doctor's office where you walk in and you see that little sign with their cancel policy. It does need to be communicated to them. I'll talk more about that in a moment.

You want to be clear. Do they lose a session if they cancel with less than 24 hours' notice, or do you reschedule regardless of how short a notice?

I can tell you that we're pretty accommodating. I keep referencing the Diamond level so that you guys can hear, even at a high level with a big investment, what the boundaries can be and what your sense of obligation might or might not be. I think it's important for you to hear this. That's why I keep bringing it up.

At the Diamond level, if somebody needs to cancel and it's last minute, or in other words less than 24 hours, I will do my best to accommodate a rescheduling, but I can't guarantee that I'll be able to do that.

I'm crystal clear about that when they sign up with me. I say it basically just how I said it to you guys. That lets them know. My Diamond clients don't cancel very often.

Moving on through this sheet in your workbook, you do want to let your client know in advance what your cancellation policy is. I'll talk in just a little bit about how to let them know about all of your policies. It's a piece that we'll cover here today.

You want to let your client know there may be times when you have to reschedule an appointment. We always let people know in our coaching programs and my private clients if we have to reschedule.

Things come up. Sometimes I get an opportunity to attend a workshop or an event that I hadn't planned on, or one of my horses has a problem and the vet's here. Things happen. We take it seriously. It's not like we reschedule willy-nilly, but I reserve the right to have to reschedule.

If I have to reschedule, I absolutely make up for that session. There's no question. Of course, that is what's obviously appropriate.

I am usually very flexible. I have moderate flexibility if the clients cancel. I'm not going to bend over backwards to reschedule. If I have to reschedule, I'm going to bend over backwards to make it work for them.

Let me just give you this piece. Where I'm going through these types of things is usually in that kickstart call. I go over what a few of the policies are. You can call them rules of the road or whatever you want to call them. Policies is fine.

I don't say guidelines. Guidelines, to me, is pretty soft. I don't want to be that soft in my language on this. You need clearer boundaries than guidelines.

I don't make a big deal about it. I just say, "There are a few things. Let's go through this." I usually go through it at the start of the kickstart call. I go through that stuff, and then we turn to them and go through their kickstart form.

Confirming their next appointment, I always do that at the end of the coaching session. I just say, "We're scheduled to talk in two weeks." If I'm here, I'll say, "I'm here. I'm not traveling. If you need anything in between, let me know. I'm definitely here for you."

I might say, "We're preparing for an event. I'm here, but my time's limited. I know you've got something important going on. If you need me, let me know, and I will absolutely get to it."

I just let them know what to expect as far as my availability between now and their next session.

If a client shows up late, this is something to coach on. The main thing that I want you to make a note of here is you'll see on the sheet, it says, "What's key is coaching on it from a place of curiosity without feeling parental."

In other words, you can't have a charge about it or any emotional heat. If you have some emotional heat about it, don't bring it up in that moment. You need to find a place where you can truly come to it as a coach and not from a place of being parental or pissed off.

If somebody is late one time, I may not say anything, especially if they're a brand new client. I don't know what this means yet. If they are late a second time, I'll say, “I notice you often call in for our coaching together five minutes late, and I’m curious about that.” I bring it up.

If a client is late, it does not mean that you are obligated to go over time. That’s your choice. My recommendation is that you don’t do it. That’s their time, and how they use their time is up to them.

My life is often very appointment-driven because of my riding lessons, Pilates and this and that. I can tell you that my Pilates people are super strict about time.

I had one Pilates gal where it was a big driving distance. It was just too far, and I was habitually late. She was really clear and said, “This is your time. If you want to choose to chew up half of it driving here, that’s up to you,” but she didn’t go over time, and that really taught me something.

What I put on the sheet here is that you want to mindful of creating codependency where they’re late and you go over time believing you need to make up for it. This is not a good dynamic.

If a client is a no-show, reach out to them either with an email or a phone call within six to seven minutes.

My clients are on time. They’re investing a lot of money. They are on time. They’re incredibly punctual.

Suzie, I think you’ve had to help out with this a few times where it’s like where are they? Can you reach them via email? My clients are mostly in Europe, actually, at this point. We don’t do it on Skype. They always call me. I’m not quite sure how to get a hold of them, so I always reach out to Suzie saying, “Help. They’re not here. What’s going on?”

If a client cancels more than once in a blue moon, because every now and then things come up, but if they’re canceling fairly frequently, that’s something to coach on.

The last one on the sheet is if they come unprepared, you want to reconnect them to what’s important to be focused on.

I had a client I worked with for years, Diamond level, and she would come pretty much to every coaching session saying, “I have no idea what I want to coach on today.” I would think, “Really? How could that be? There’s always stuff to coach on.”

It's just how she was, and I wasn't going to change her. She actually taught me. Because that's how she was, it gave me an opportunity to really learn how I can help get them reoriented to what's important to them.

I would say something like, "What I have in my notes is this and this, and I know you said where you wanted to be headed was here and here." She'd say, "Oh, that's right."

I want to point out on the bottom of this page the very last sentence. It says, "Remember that the coach is greatly supporting a client by holding their agenda as a priority for them, as often the client has competing demands on their time and attention."

This is really important. Coaching is one of the most beautiful and rare opportunities where somebody can come to a space, meaning a call with somebody else, you as the coach, and truly focus on themselves.

Especially when we're coaching women, they will often naturally start to lower their own priorities. They'll diminish what they think is important in favor of other people's priorities. As a coach, the other people aren't your client. Your client is your client.

I know Kailash does this a lot with the clients. She and I talk about it a lot. She gets her clients to remember and she reminds them of what they said was important to them, and they feel on top of the world with that reminder.

When you do that for them, it helps keep them from going into excuses or getting discouraged, and it sends a signal that you care and that you are paying attention.

I know that when I have a mentor who does that for me, and they don't all do it, they're reminding me of my greatness, what's important and the bigger picture, and it just makes me feel like "Yes, I can do this." I find it incredibly encouraging.

Any questions about that?

Suzie: We're good at the moment, Kendall.

Kendall: Good. I think I warned you guys this is a big call. It should be three calls. We're doing a lot, so just keep breathing, take notes and take it all in.

The next piece is about payment tools to help you grow your business. Note that our recommendations are affiliate links, so we do get affiliate commissions. The bulk of those affiliate commissions go toward Equine Voices Sanctuary. Actually, all of the commissions go there. Plus, I add to it. That's my animal charity of choice.

I'm so grateful to DirectPay. They send me a commission check for the referrals, and they actually match my commission check directly to Equine Voices. They actually send the check to me with an envelope to go to Equine Voices, and I mail it to Equine Voices for them. They actually match. How cool is that? It's very cool. Just know that, to be on the up and up, these are affiliate links.

By the way, we're adding another affiliate link. I'm not sure if it's live yet or not, but it will be this week. It's www.KendallCoachesConsole.com. They've got a great product that we really believe in. That's our affiliate link to go to Coaches Console.

I want to speak a little bit about the declines policy and system. You want to have some kind of policy around when somebody owes you money. I'm going to give you a couple of tips on that in just a few minutes on a separate page. Just know that you need to have that.

The declines policy is what you do when somebody declines, and the accounts receivable policy is pretty much the same thing. It's when they owe you money. It's slightly different, and I'll talk about it in just a moment.

Here are tips on what not to do. You do not want to use PayPal as your main source of accepting payment. I know it's really popular. We use PayPal for paying certain vendors. We do use PayPal for paying affiliates. It's fantastic for that.

It's great for making payments. For being the recipient, as a coach, I don't love it. Unless something has changed, you're still not in control of the transaction. In other words, the client needs to initiate that transaction. For that reason, that's why I don't like it.

Accepting checks for monthly payments is a really bad idea. It puts you into a place where you never know if the money is going to be coming.

People can say, "I sent it," and then they get their coaching session, but you don't get the check. It creates issues. Somebody's check can bounce.

Do not accept checks outside of your country. We don't even accept checks from Canada, which is our neighbor to the north. It's the same language. They're an English-speaking country. It's totally ridiculous how the banks handle checks.

They actually send them to Canada, so it can take weeks for a check from Canada to clear.

Outside of the US, we use a credit card where we can, but I would say 80% of the time we're using wire transfers. We don't use wire transfers for payments.

I love using wire transfers. There is a small fee. It can be $15 to $30, so there is somewhat of a fee. It usually works out to be the same or less than a credit card merchant account processing fee, typically, so I'm okay with it that way.

The thing I like about wires is that the money lands in your account within one to three days, and it has a confirmation number. If it doesn't land in your account, the bank can track it down and find out where it is. They can cancel and reinitiate it. They're not foolproof, but they are safe. I love that.

We don't take wires for payments because, again, it's the same thing as PayPal. We're not in control of triggering the transaction.

The exception to that is we offer a payment plan. Some of you guys know this because you've taken us up on it. It's actually turned out to be incredibly popular. We have the payment deposit plus X number of payments, or a full pay.

The one we do that's really popular is somebody makes the deposit and then the balance in 30 days, and it counts the same as a full pay. There's no upcharge.. It's the same amount as a full pay. That's been a very popular payment plan for us.

We will accept a wire on both the deposit and the final payment amount in 30 days.

The main thing is you don't want to have to invoice and wait for payment. I know, for those of you doing corporate work, you do have to get invoice and wait for payment. There's no getting around that because that's how they work. Unless you're doing corporate work, you don't want to have to wait for your money.

Let's dive right into what to do and say for client payment issues. Again, the sheet is not for a client.

Create your policy ahead of time. Type it up even if it's a sentence or two. Have it handy as your resource.

What this is going to do for you is give you enormous confidence, especially in that moment where a client is not paying and you're taking it personally, which you're probably going to do initially.

You’re not going to necessarily show this policy to the client, but you can say, “My policy is,” and you’re being truthful. You have a policy.

I just find that it gives you a lot of confidence in that moment, because you have something you can rely on to help see you through an emotional moment.

You want to address the situation early. These situations don’t get better with time. They don’t ripen with age. They start to stink.

It doesn’t improve with silence. This is where you need to put your big-girl pants on. You take a breath, you exhale and you have a courageous money conversation.

You hold the client as powerful no matter what. It’s going to look and sound different in every situation.

I’ll give you a tip on this, because it’s something I’m masterful at. First of all, most of the time, I don’t take it personally. Sometimes I get triggered. I’m human. I’ll take it personally. I don’t have the conversation or write the email when I’m in that space.

I blow off steam. I go out, think about it and really find my place of truth where I can come from my highest and best self and come from the space of being a leader, and still hold them as powerful and myself as powerful at the same time. Remember that the situation likely has nothing to do with you.

Understand that sometimes people will get pissed off with you. People will tend to get pissed off when you call them on their bullshit, especially if they’re really married to being a victim. They’ll be a victim and blame. When they’re married to that, they can be angry.

It has nothing to do with you. You just happen to be probably one of a string of people that they’re experiencing in this way.

It doesn’t mean that I’m not compassionate, because we are always compassionate. Here’s an example of something I will say or I’ll write in an email.

I’ll say, “I understand this is a difficult time for you.” That’s one way that I honor their experience without buying into it. I don’t say, “That sounds terrible. Poor you.” I say, “I understand this is a difficult time for you,” or, “There’s no way you can convince me.” That’s a bit of tough love.

I'll say, "I'm here to hold you as powerful because I know that this, too, will pass, and you can come out of this stronger on the other side. I'm here to help you do that."

I think my mindset is that I'm not going to just let them go. I'm not going to let them give up on themselves, because I'm not giving up on them.

It doesn't always work. Sometimes that's just where they're going to go, but it doesn't mean that I have to buy into it.

Let me be clear. You want to be clear in your policy as to when your services stop without payment being made.

I have heard from so many coaches, too many to count, where they'll say a client owes them for a month, two months or longer, and they're still giving coaching. Why?

It's really tough. It's not fun. You know the coaching will help them, but you're not being paid. You can work out a different payment plan. You can do something, but you have to be paid. Otherwise, service stops.

To me, they have to make a good faith payment, and if they can't do that, we're done. We're not a charity.

Remind them of their agreement. This is where you have to say, "We do have an agreement."

I'll say, "As you know from our agreement, it states that you are financially responsible. Whether you choose to participate or not is up to you, but the financial responsibility is still intact."

I'll be honest with you, coaches. That's the moment where they often get pissed off. I'm not saying they say, "You're right. I forgot about that." They get a little pissed off, and that's okay. I am reminding them of their agreement. That's my role to do that.

You can work out a payment plan that works for both of you. Sometimes people just need a week's delay or two weeks, or a partial payment now and the rest in two weeks. There are all kinds of things that happen. It's just best to have a conversation about it.

Know when to let someone go. Of course, I could tell you a million different stories because I run so many different high-end, Platinum-level groups, but one really stood out for me.

I had a client in a Platinum group. She was an awful client. She was uncoachable, and she was tanking the whole group.

When I was first filling that group, she was in my no pile. She wasn't in the yes pile. There was somebody else in the yes pile, and when I was going through the yeses and personally calling them and said, "Congratulations. I'd love to have you in the program," she said, "My friend so-and-so also applied. I hope she's going to get to be in, too." Of course, her friend was in the no pile.

This was years ago, and I got hooked. What hooked me was guilt. I said, "Actually, I wasn't sure," which wasn't true. She was in the no pile.

My brand new client said, "No, she's great, and here's why." She really sold her to me.

I listened to her, said okay and accepted her friend into the program. I moved her from the no to the yes pile. That was a big mistake. She ended up tanking the whole group.

I had at least two, if not three, people calling me and emailing me wanting to quit the group because of this woman. That's how bad it was. This is all happening in one week's time. I told each one of them, "I will take care of this. You're not leaving the group."

I had a conversation with that problem client. It didn't go well. She was super angry. She said that she felt like she was being voted off the island. Those were her words.

She wasn't complaining about the program. She actually loved the program.

Then she wanted her money back. Technically, she didn't have a right to any money back. I was really fighting it and thinking, "No, I'm going by the letter of the agreement."

This hassle went on for about a week and a half, and a coach friend said to me, "Kendall, what is the value of your time and energy?" and something clicked. I said, "You're right."

I let that client go, and not only did I let her go, I actually did a partial refund. It about killed me to write that check. I was so pissed. She didn't deserve it. It wasn't fair. It wasn't right. I had to get over it and say, "I want her gone. I want her out of my life."

I'll give you some language here. I feel like the whole energy of this page is really a downer, but it's good to know how to handle these things.

I want you to look at the bottom of that page. I give you some beautiful language that I created very early on that I would say to clients. I'll model it for you.

You say, "I wouldn't be the Platinum coach," if that's the name of your program, "you expect me to be if I simply said, 'No problem. You can quit the program.' What's really going on for you?" That is incredibly powerful.

Let me take a little breath. We've got two more pieces to cover. Let me just see if there are any questions here so far.

Suzie: We have some written in questions. The first one is from Debbie, and I just want to make sure I have this clear. I believe she's saying, "What amount do you accept with a credit card versus switching to a wire transfer?"

Kendall: That's a great question. That is going to be up to you and your risk tolerance for a potential chargeback. Let me be clear about this. A chargeback is where something happens for or to a client and they decide to contest the charge on their credit card.

We've only had this happen one time. It happened last year. I'm not going to take up your time here with all the details. It was kind of a crazy client.

I was in a conversation with her, and she did that. She didn't even tell me she was going to do it, and she said she did it for a particular reason that had nothing to do with the program. It was for some other reason, but she didn't tell me that she did it.

I don't remember the dollar amount, but it was significant. It was thousands of dollars.

It's not true with American Express, but for Visa and MasterCard, what will happen is they immediately go into your bank account, take the money out of your bank account and hold on to that money in question until the dispute is settled. American Express doesn't do that.

When I say it's up to your risk tolerance, understand that can happen. By the way, you're paying all those transaction fees, which can start to really add up.

We set it with the Diamond clients that the most we'll take on a credit card on a full pay is $10,000 and the balance has to be a wire.

I have a fair degree of tolerance with this. We've just had it happen so little. That was the one gal that it's happened with.

We have people in $20,000 and $30,000 programs, and the whole thing goes on the credit card. I'm not comfortable with $30,000. I'm okay with $25,000, which is my personal max. My risk tolerance ends there.

I hope that answers the question for you. You decide. We do $1,500 all the time. You guys know our deposits are $1,500. If it's a $5,000 program fee, it's a $1,500 deposit, or they can do the full $5,000. We do that all the time. That's an easy one.

That may not be true for all of you right now. You may not have that level of risk tolerance.

Also, within the United States, we have a business checking account and we get free wire transfers within the US. Internationally, I think they're $30 or $35.

I hope that answers the question, or at least gives you a guide as to deciding your own amount.

Let's keep going. Next question, Suzie.

Suzie: Where do you put your download program documents, in Infusionsoft or Coaches Console? That's from Denise.

Kendall: I'm not a Coaches Console expert. I'm actually not an Infusionsoft expert. I've never logged on to Infusion, and I'm not so proud of that. Before, we were on 1ShoppingCart, and I knew it inside out. I knew it like the back of my hand, because I did everything.

There isn't any place to put all your downloadable pieces in Infusionsoft, is there, Suzie? There's no place to put it.

Suzie: You can put it within an email to send out, but we don't use it for that purpose.

Kendall: Coaches Console may allow you do that, and I think it should. It's a great product. I just don't know that particular detail of it. We have a whole Client Center, so it's set up a little differently.

There's another thing you can do that we used to do before we had the Client Center. We had a password-protected page. Everybody had the same password, which has its pros and cons. We had it on an HTML page or a WordPress page.

We would upload the documents to the website as a PDF file or Word document, depending on what it was, and then on that HTML page, it just had a link. It would say the name of it and a link right there, so they were accessing it directly off of our server.

It wasn't in Infusion or Coaches Console or anything. It was just uploaded to our site, and a link was produced.

I hope that answers the question. If not, post again online and we'll get you more tech help.

By the way, you guys see us doing a lot of things here. We've been in the business a long time, and there are a lot better tools now. You can get by really simply.

With our Client Center, we're using WishList. Isn't that what we're using, Suzie? We have so many different little plugins. We have 20 different plugins.

Suzie: Yes, it's the WishList plugin.

Kendall: It allows us to have a unique log-on and password per person. If somebody ends their program and they don't renew, they've moved on or they decline their credit card, there isn't payment going through and they're not responding to us, then we can cancel them out without having to change the password for everybody. That's a nice benefit. We didn't have that until a year and a half ago.

Let's go on to two more pieces. I'll do this pretty quickly.

How do you have a courageous conversation with a client? This could be about money. It could be about anything. It could be about showing up late. It could be that they habitually want to run over session and push your boundaries that way or inappropriate behavior in a group.

You've got the template here with the seven steps. I want to go through them and just point out a few things. This is a signature process that I created. It works brilliantly.

Step 1 is to really remember it's not about you. The situation is not about you. How you handle it is all about you. What the other person is creating is not about you. That's really important.

The reason I like to look at "how I handle the situation is about me" is because it helps me grow as a leader. It's helped me create the reputation I've created. I have a stellar reputation out there in the coaching world, and this particular model has really helped me create that.

People have their own things that they're going through. You just happen to be the next person in their lineup who is experiencing them.

I believe, as a coach, that we have the opportunity to help somebody step up and out of their stuff and into a better way of being.

The one thing I'll say about this is, if you're attracting a lot of the same types of issues, you need to look at that and say, "What am I doing to contribute to this?"

Step 2 is you want to position yourself as the leader by taking control of the conversation. How you do that is by asking questions.

What you want to do is clearly state what you want to talk about. I'm going to give you an example in a second. You want to clearly state what you want the outcome to be. Remember that the person asking questions is the leader in the conversation.

For example, here's what it can sound like. Let's say you've set up a call. You can say, "I've noticed this is happening, and I'd like to have a conversation with you about it. What I want to discuss is coming late to every call," or, "I want to discuss the payments declining," or whatever it is.

Then you can go on to say, "I want to start by hearing what you would like as an outcome of our talking together today, and I'll share what my outcome is. Then we'll see what we can create together. Does that sound good to you?"

Coaches, the modeling I'm giving you is really designed more as a separate conversation where they know that you're having a conversation about X, so they understand what the topic is.

Let me give you a more specific example. You can say, "I noticed that the payment isn't going through, and I want to talk with you about this so we can get you on track with your payments and be able to continue working together toward your goals."

Here's a giant tip. Their outcome does not need to match yours. It may not. It's okay for you to have a different outcome.

They can say, "I just need to put the coaching on hold for a while." You'll hear that one a lot. "I need to put the coaching on hold. I've got so much going on."

You can say, "What I hear is that you want to put the coaching on hold. Actually, what I really hear is that you have a lot going on. My outcome is to support you with that and that the coaching continues uninterrupted."

I'm very clear about expressing what my outcome is, and I'm clear about what the outcome is prior to the call.

Steps 3, 4 and 5 actually work together. There's not a lot of demarcation between each of them. In seeking to understand, you're asking a lot of questions. You're mirroring, and the mirroring is going to feel a little bit like you're parodying or a little bit robotic. That's okay.

What you can do is say, "Let me make sure I've got this. Is what you're telling me X?" They're going to say yes, or they'll correct you a little bit.

It's really important and critical in this conversation for you as a leader to be crystal clear at every point of this conversation frame. Be really clear, because as soon as you're not clear and you're making assumptions, the whole conversation is going to fly downhill from there.

I'm going to wrap up here really quickly. I know we're at time. There's one more piece that we need to do. Because we have a Q&A call next week, I'm going to do it at the top of the Q&A call, which is about boundaries.

To finish up here, when mirroring is done well, it conveys understanding without meaning that you're agreeing with them.

Step 6 is explaining the options. You don't have to have all the answers. You can keep asking questions. I've had many times in a courageous conversation where I've said, "What do you see as an option here?"

There are certain situations where I want them to speak up. They need to be engaged, step up and start taking some ownership. What do they see as an option? If they say, "I don't know. I'm not really sure," say, "What if you did know?"

In other words, you're coaching throughout this. You can say, "As I see it, there are a couple of options here. One option is this. A second option is that."

You can say what your preference is. You can say which one you think is ideal for them. It really depends on the situation.

My main point that I want to convey to you, coaches, is that it's okay for you to have preferences.

Step 7 is getting agreement. You want to clearly repeat what is going to happen. You can say, “Let me just make sure I’ve got this clear. You’re going to do this. I’m going to do this. It’s going to happen by this date.” This is where, coaches, you need to be very simple and specific.

I can’t give you the assignment today because it’s on the boundaries piece that we didn’t get to. Darn. Here’s what’s going to happen. This is funny. I can give you a proof question. I know we’re a couple of minutes over, and I apologize for that.

We’ll start at the top of the next call next week and I’ll go through the boundaries. I’ll give you the assignment then. Normally, a Q&A call doesn’t have an assignment anyway, so that fits beautifully.

The proof question is this. What is one of the four purposes behind the Getting Started Client Form? There are four purposes. You have four different correct answers to this question. You just need to list one of them. Whichever one of those four you want to list is fine.

That was a big call. I know you’ll have questions. Post them online. We’ll get your questions answered. I look forward to being with you next Tuesday.

Thanks, everybody.

Participants: Thank you, Kendall.

