Guide to Mastering Your Coaching Business

CoachLogix

Elements of a Successful Coaching Engagement

Introduction

One of the most common problems a coach faces is finding consistency and scale in his or her practice. In our weekly live webinars, coaches consistently ask about how they should structure their coaching engagements and how they can deliver a more consistent product across all their clients. These questions inspired the creation of this guide, where we outline several ways we have found success adding repeatable structure to the coaching engagement.

The following processes and practices are organized by the different phases of a coaching engagement from start to finish. Although we think each of our recommendations add value, it's not necessary or realistic to standardize every one of these practices.

Your style as a coach will determine how much of your engagement is heavily process-oriented and what parts have more flexibility. It's certainly possible to use every one of these items, but with too much structure your coaching engagement may border on a clinical experience for your coachees.

Everyone is different and we encourage coaches to experiment with different styles and degrees of structure. Whatever style you choose, we hope you find these structural elements helpful as you advance your coaching practice or coaching business.

“ *Everyone is different and we encourage coaches to experiment with different styles and degrees of structure.*

Pre-Engagement

Opportunity for structure and consistency begins well before any contracts are signed and your coaching engagement begins. Consistency in the sales and onboarding process, in fact, may be some of the most important elements since these will determine first impressions and set the tone for the relationships to come.

The Sample Session / Good Fit Interview

Also called a Coach Matching Interview or Chemistry Match Interview, this initial touchpoint serves both as an opportunity to prequalify your prospective client and also to provide a sample of your coaching services. It's important to make sure that you and the prospect will work well together, so spend this time getting to know your prospective coachee, inquiring into goals and expectations while getting a sense of personality fit.

As you do, this is also an opportunity to make a good first impression and show your prospect what it will be like to work with you. This meeting can be 15 minutes to 1 hour, depending on the items you wish to cover.

Early Engagement

Congratulations!

You now have a contractual agreement with your new coachee or organization. Once the contract is signed and you're ready to begin the engagement, there are a few early stage touchpoints that you can use to get things started. Consider the following engagement elements to be delivered early in the coaching engagement.

Maintain Momentum with Session Notes

Session notes in CoachLogix keeps all notes associated with a session in one place so you can easily pick up where you left off.

Session 1: Kickoff Session

You should consider standardizing your kickoff session so that every engagement starts on the right foot. Elements of a kickoff session are as follows:

Meet and Greet

Check in with your coachee on a personal level. Welcome him or her to the relationship and get to know them a little better on a personal level.

Intake Form / Intake Interview / Background Form

An intake form is common and recommended as an early engagement step. This form includes questions that establish what the coachee is hoping to accomplish with the coaching engagement.

It explores any specific goals the coachee might have and is documented for you to reference as you plan and carry out future coaching sessions. This form can be either provided prior to the first session, or filled out live during the kickoff session.

Informed Consent / Coaching Agreement

Reserve some time on the kickoff session to establish the details of your coaching agreement. These are the boundaries of your relationship and the ground rules of the engagement. Different coaches will have different preferences, but this includes boundaries like when and how your coachee can contact you and vice versa (example, text communication via cell phone but no calls except during sessions).

You will establish how and when sessions will be held, if sessions can be rescheduled and in what timeframe. It's critical to also make clear your policy on confidentiality. Typically, all of the coaching engagement is confidential unless the coach believes the coachee intends to hurt him / herself or others.

Goal Planning Discussion

Schedule a goal planning discussion between the first and third session. Goal setting should be done after you've had enough time to get to know your coachee so you can provide goal suggestions proactively, but it's important to discuss and establish goals relatively early in the engagement so that there are goals to work toward throughout the majority of sessions.

Getting to a Goal

Your coachee may provide a goal or you may need to help establish a goal or goals. There a few ways to record goals. One option is to adhere to the S.M.A.R.T. goal setting principles, which states that goals should be

S Specific
M Measurable
A Adaptable & attainable
R Realistic
T Time based

Finding a goal is a significant opportunity for a coach to provide value to the coachee. If the coachee is unsure of a goal, you should proactively offer what you think their goal should be. If the coachee has a stated goal, use your knowledge of the coachee to dig deeper than the surface of the stated goal. In some cases a coachee's stated goal may actually be inspired by something deeper, which inquiry into the source and cause of the surface goal can reveal.

Example:

Coachee: I have trouble completing everything on my task list each week. My goal is to be more productive and finish everything I have to do consistently.

Coach: Do you feel motivated at work? A struggle to perform can signal that you aren't challenged or fulfilled by the work you're doing.

Coachee: Well now that you mention it, it used to be easy for me to complete all my tasks. Over the past year I haven't felt challenged and it makes it hard to find purpose and motivation to get through what now feels like busywork.

Coach: It sounds like you need a new challenge. Maybe a career change. I think we should make it your goal to explore new, more challenging areas of work.

ARE YOU SETTING GOALS?

If the coachee has a stated goal, use your knowledge of the coachee to dig deeper than the surface of the stated goal. In some cases a coachee's stated goal may actually be inspired by something deeper, which inquiry into the source and cause of the surface goal can reveal.

Goal Planning (cont.)

Confidential Goals vs Company Facing Goals

To make sure your engagement is unhindered by concerns of privacy, you may need to have some goals be exclusively between you and your coachee and others which can be advertised to other parties, like the company who is investing in the coaching program for their employees.

In the example above, you wouldn't be able to share a goal like "find a new career" with the employer of your coachee. However, you are still committed to help your coachee while also showing progress to the company that hired you. In this case you should establish a company-facing goal. These goals are usually less specific but still tied to measurable results. A good example is a competency goal, like "patience," which represent a skill but not a specific personal intention.

Establish a Baseline for Goals

If you choose to measure goal progress, it helps to define the goal and provide specific examples of what success might look like. Establishing a baseline rating or measurement is essential if progress ratings and/or stakeholder feedback will be collected. You can use a combination of ratings and written narratives completed by coachee, the coachee manager, and peers to use as a baseline. If you choose to collect baselines this way, we recommend you involve three to five people so that you have ample data to compare. Be sure to collect ratings from those same people at the end of the engagement so that you can compare progress apples to apples before and after the engagement. You might also include a personality and leadership assessment as part of your baseline and goals. Such assessments are offered by Hogan, DISC, and MBTI.

If you're looking for an easy, consistent way to collect your baseline data, consider using an online survey tool. Pulse surveys, Google Forms, and Survey Monkey can be used to build and send surveys to relevant parties to collect your goal baselines. CoachLogix has a built-in survey tool and has the added advantage of putting survey results next to session notes so you can put survey results side by side to survey session completions, reschedules, etc.

Establish Action Items

Once you've established goals, you should clearly outline what steps need to be taken to work toward the stated goals. These should be concrete items that you can later measure. In the case of the unmotivated coachee, action items might include reflection on new career opportunities, or identifying possible new career paths. **Be sure to record these action items and plan them into your program.**

Coaching Sessions

Now that you've established the early phase elements, you can begin working with your coachee during regular coaching sessions. Here are a few guidelines and good habits to develop for the duration of your coaching engagement.

Use a Tool to Schedule Your Sessions

Scheduling and remembering your sessions is, of course, a foundational part of a coaching engagement. Calendar apps or scheduling apps like Acuity online scheduling are great tools. CoachLogix allows you to schedule and templatize sessions of your entire program. It also lets you customize and eforce your reschedule policy or cancelation policy. If your coachee only has 24 hours to reschedule a session, the reschedule option is only available 24 hours prior to the session before it is recorded as a missed session.

Take Notes After Each Session

Good session notes allow you pick up right where you left of and remember former conversations, which builds confidence and trust in your coachees. Good notes remind you exactly what you talked about last time and what progress was made so you can maintain forward momentum. There are plenty of note-taking apps (if not physical notes) you can use to keep session notes and upload them to the cloud so that you can access them from anywhere.

Keep Your Notes *Secure*

Confidentiality is critical in many coaching engagements, so your notes should be secure. Be sure any online note repository is secure. On the CoachLogix platform we built a secure, cloud-based repository for notes. Notes are organized by session so you can easily and securely keep track of session notes and access them from anywhere you have an internet connection.

Update Goals As Needed

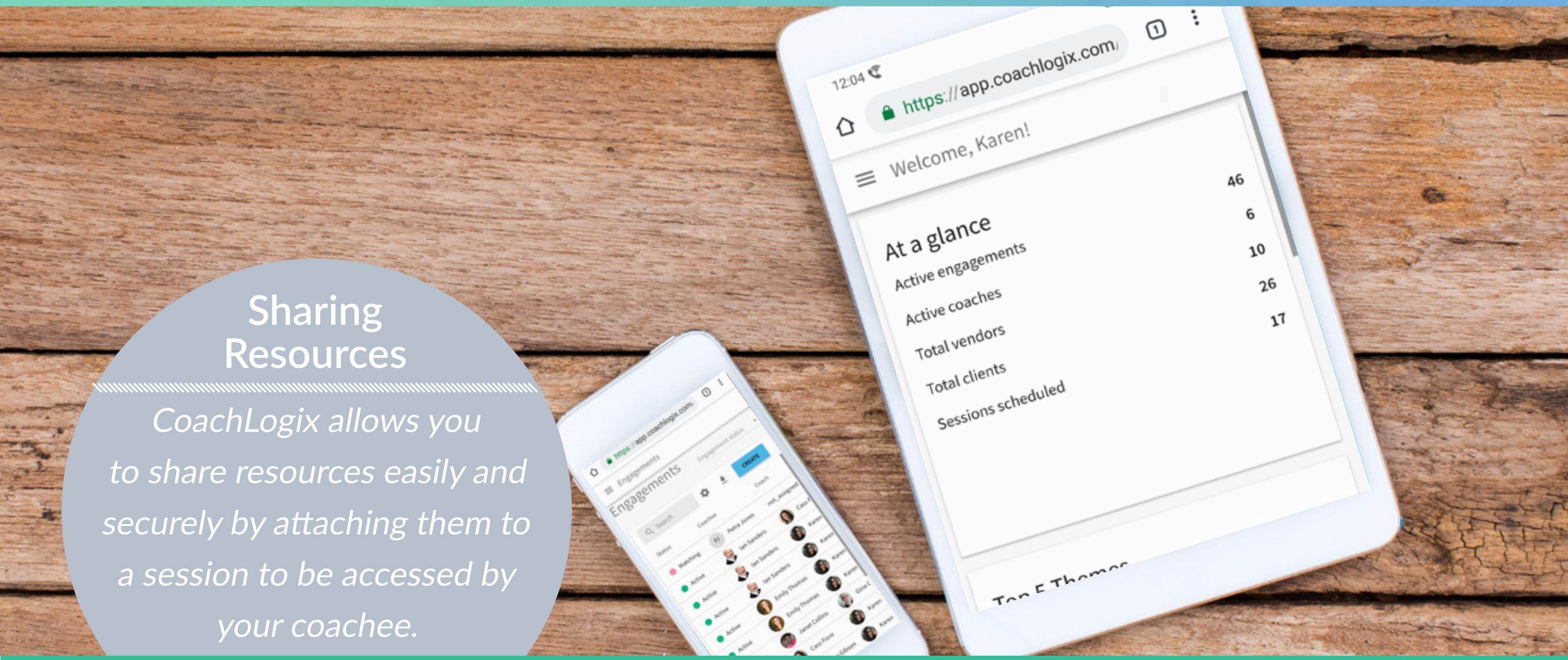
As you progress through the engagement, you should review goals and adjust them according to progress made. In some cases you may need to pivot a goal if you and the coachee agree that an alternative or altered goal is more appropriate.

Don't let canceled sessions slip through the cracks!

If a coachee has canceled a session, set a reminder for yourself so that you don't forget that a new session has to be scheduled.

With CoachLogix, this is easy since scheduled sessions are pre-set and can be viewed in one place.

Between Sessions



Sharing Resources

CoachLogix allows you to share resources easily and securely by attaching them to a session to be accessed by your coachee.

Sessions are where most of your coaching will be done, but there is plenty of value you can provide between sessions. Consider these between-session habits for your practice.

Share Resources

You might come across articles, videos, podcasts, or other resources that will provide value to your coachee in between sessions. For the coachee looking for a new career, you might share job descriptions or postings. Sharing resources is an effective way to maintain engagement and enrich sessions with new topics for discussion. As an established coach, you might have some favorite resources you share with all your coachees.

CoachLogix allows you to share a resource area, which can be attached to a session and securely accessed by your coachee. You can also create a session template with predetermined resources, allowing you to automate content delivery according to session completions or send the content manually at your discretion.

Assign Homework

There are likely things your coachee can do in between sessions to work toward your established goals. It's common to give your coachee things to accomplish in between sessions to maintain engagement and provide additional opportunities to work toward goals. Sticking with the example of career goals, the coach might ask the coachee to bring three alternative career options to the next coaching session.

Mid Point Report

Depending on your engagement and agreement, you may conduct a mid point report where you check in on your goals and re-measure goals that you established baselines for at the beginning of the report. This might involve surveys to the same parties with whom you set baselines and a review of present goals to allow opportunity to review and pivot goals if warranted.

Whether a mid point report is necessary depends on the agreement established and the length of the engagement. For longer engagements, a midpoint report is encouraged.

Automate Content Delivery

Avoid the headache of monitoring each individual engagement to make sure it's moving forward. Now you can schedule notifications and content to be sent automatically to your clients via email or SMS, including requests to schedule sessions, reminders and follow-ups. You can even automate the delivery of forms, files, and tasks.

End of Engagement

In the final phases of your engagement, you're hopefully building trust, finding new ways to support your coachee, and making progress on your established goals. The following engagement elements will help you prove results as you bring things to a close.

End of Engagement Reporting

CoachLogix has tools to help you send reports to your coachee outlining progress over the course of your engagement.

Final Sessions

Goal Measurement

If you've set baseline and midpoint goals, we encourage you measure your goals the same way you established your baseline and mid point reports. Send the same survey questions sent to the same 3rd parties so that you can compare results apples to apples. We recommend you conduct the final measurement with enough time that you can share and discuss these results with your coachee during the final session.

Goal Updates

Whether or not goals are achieved, be sure to update your notes based on progress made. If the goals were achieved, congratulate your coachee but help them determine the next goal for them to work on. Maybe you have pivoted your goals slightly or significantly. For example, a goal pivot due to a significant life event is common. Make plans for next steps beyond the coaching engagement so that the coachee can continue to grow after the engagement is over.

End Summary Report

An end summary report serves to summarize the entire engagement for both coachee and the company or 3rd party that may have initiated the engagement. If there is a company involved, this report may be different for the company than the one provided to the coachee in order to maintain confidentiality of personal goals.

Elements of an End Summary Report

1. Goal Progress
2. Goal Changes
3. Goal Measurements / Feedback
4. Themes that Surfaced
5. Recommended Next Steps

Wrap Up & Coach Feedback

Following the end of the engagement, it's beneficial to request feedback from your coachee and the organization that hired you. This will provide you with valuable feedback to improve future coaching engagements and, if the feedback is positive, provide you with testimonials you can use in marketing and sales materials.

Don't be afraid to ask for a referral at the end of your feedback survey, our experience shows this to be a great place to ask for feedback.

Sample Coach Feedback Survey

- ☑ Did your coach provide value?
- ☑ Would you recommend your coach?
- ☑ How could your coach improve the engagement?

CoachLogix also makes it easy to facilitate creation and storage of a coach feedback survey that you can easily distribute to all parties involved.

Don't be afraid to ask for a referral at the end of your feedback survey.

Engagement Complete!

Great work, you've completed the engagement! Hopefully all parties are happy and you have some great feedback to help sell future engagements.

More About CoachLogix

We hope you found this guide to be useful as you consider ways to improve the structure of your engagements. CoachLogix was built to help coaches improve and grow their practices by providing tools to facilitate and automate every step of the coaching business - from coaching agreements to billing and invoicing.

If you're interested in trying CoachLogix for your coaching business or individual practice, you can sign up for a completely free limited engagement CoachLogix account, which has no trial expiration.

Thank you and happy coaching!
- The CoachLogix Team

You're in good company.

Walmart | Navicent Health | HUDSON Institute of Coaching | LinkedIn | MAYO CLINIC

CoachLogix was built to help coaches improve and grow their practices by providing tools to facilitate and automate every step of the coaching business.