

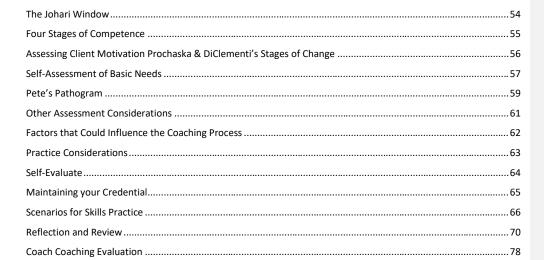
Coaching Program Workbook

CCE-approved 30-Hour Coaching Program
Part 2 of the 60 & 120-Hour Programs





Welcome Letter	
What is the Difference between Coaching, Counseling, and Consulting?	5
BCC Code of Ethics	6
Considerations in Coaching	8
Issues in Coaching	<u>.</u>
The Five Basic Needs	11
Essential Coaching Skills	13
Coach Characteristics	15
Types of Coaching Questions	19
Role Coach vs. Role of Client	23
Coach Coaching Model	24
The Elements of an Effective Plan	29
Relationship Habits	31
Identification of Client Resources	32
Decision-Making Model	34
Self-Sabotage	35
Affirmations Checklist	36
Perception Shifting Worksheet	37
Organizational Roles	38
Sample Corporation Organization Chart	39
Sample Sole Proprietor Organizational Chart	39
Sample Flat Organizational Chart	40
Conditions of Quality	43
Conditions of Quality Checklist	44
Creating Systemic Change	46
Resistant Employees	47
Circles of Control	48
Triangle of Choice	49
Get the Knot Over Your Dot	50
Solving Circle	51
Some Coaching Assessments	52





Dear Choice Coach,

We at Academy of Choice know you have many options when choosing the right coaching program for you and are pleased and honored that you chose us! We have a wonderful program in store for you that will not only help you learn what we suspect will be on the national BCC exam, but will also provide you with essential coaching skills, along with our proprietary system of Choice Coaching, where you teach your clients to be bigger than anything that happens to them.

This workshop was designed to accompany our live, in-person training. The face-to-face content of this program will consist of 30 contact hours.

While you are taking this workshop, we want you to process the information on two levels – first, learn the concepts as they relate to your life. We hope you will apply the Choice Coaching Principles to your daily living to help you enrich it, while at the same time providing an example for your clients of what Choice Coaching can do for a person. Secondly, you will learn these concepts as a method of helping your clients apply Choice Coaching in their lives. You will be able to coach others without applying these concepts to your own life, but personal integration will cause you to be so much more effective so we hope you will begin that journey.

You chose the in-person program, but we also want you to have access to our Facebook community to interact with others who are taking the distance learning program if you choose. Simply create a Facebook account if you don't already have one. It's free. If you are concerned about your privacy, you can create a fictitious name to use only at Academy of Choice. Once you have your account, go to www.facebook.com/kimolver and send me a friend request. I will accept and then add you to the private Academy of Choice group where you will have access to our other coaching students.

The Academy of Choice also offers coaching for coaches (http://www.academyofchoice.com/coaching-for-coaching-for-coaches/supervision/) if you ever find yourself in need of those services.

Your participation at Academy of Choice entitles you to one-month free with Coaching Websites. If you want them to create your website and host it for you, you only have to use promo code "1FREE" and you will get your website developed and one month hosting for free.

Get ready for a highly exciting, fun, concentrated learning experience. Ready?

Open Your Heart, Free Your Mind & Transform Your Life!

Kim Olver

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Coaching: As stated by the Board Certified Coach; coaching is assessing the needs of clients, collaborate with clients on solutions, and offer strategies that assist individuals and organizations in reaching identified goals.

- Sport
- Life
- Job
- Weight Loss
- Manager
- Lawyer
- Tutor
- Teacher

Counseling: As stated by the *Merriam-Webster Dictionary*: counseling is professional guidance of the individual by utilizing psychological methods especially in collecting case history data, using various techniques of the personal interview, and testing interests and aptitudes.

- Mental Health
- Christian
- Career
- Credit
- Grief
- Drug and Alcohol
- School
- Marriage

Consulting: A consultant as described in the book, Getting Started in Personal & Executive Coaching, is someone who is the expert that give the client direct answers to specific problems and who has all the right answers.

- Management
- Immigration
- Environment
- Law
- Communication
- Medicine
- Human Resources
- Economics



The Board of Certified Coaches has ethics as does any organization. The following are the ethics to be followed as a Certified Coach.

These ethical standards can be found at http://www.cce-global.org/Assets/Ethics/BCCcodeofethics.pdf

SECTION A: COMPLIANCE WITH LEGAL REQUIREMENTS AND CONDUCT STANDARDS

BCC certificants and applicants shall:

- 1. Comply with all applicable laws and governmental regulations relating to occupational activities.
- 2. Refrain from conduct or behavior that is contrary to legal or regulatory requirements.
- 3. Refrain from behavior involving dishonesty or fraud.
- 4. Refrain from unlawful discrimination in occupational activities, including age, race, gender, ethnicity, sexual orientation, gender orientation, religion, national origin or disability.
- Avoid condoning or engaging in harassment, including deliberate or repeated unwelcomed comments, gestures or physical contact.
- 6. Maintain accurate records related to the coaching relationship for a period of five (5) years. Records must include current data identifying the client and sponsor; fees schedule and payment documentation; coaching service agreement; purpose and goals of services; progress notes; referrals made; and date of coaching relationship termination. At the conclusion of the five year record maintenance period, certificants and applicants may dispose of coaching records in a manner that protects client privacy.
- 7. Disclose to appropriate governmental agencies and sponsors when a client appears to be a danger to or is otherwise unable to act safely concerning self or others. Such disclosures shall be consistent with the coaching service agreement as well as legal and occupational requirements.

SECTION B: COMPLIANCE WITH CCE ORGANIZATIONAL POLICIES AND RULES

BCC certificants and applicants shall:

- 1. Comply with all applicable CCE policies and procedures, including the BCC Code of Ethics and CCE Ethics Case Procedures, as amended or revised.
- 2. Provide accurate information to CCE.
- 3. Maintain the security of confidential CCE information and materials, including examination materials.
- 4. Cooperate with CCE concerning ethics matters, including the collection of information.
- 5. Inform and support others, such as employers, sponsors or coaches, regarding the responsibilities established by this Code.
- 6. Report an apparent violation of the BCC Code of Ethics by a certificant or an applicant upon a factual basis



BCC certificants and applicants shall:

- 1. Conduct all occupational activities in a responsible manner.
- Recognize the limitations of coaching practice and qualifications, and provide services only when qualified.
 Certificants and applicants are responsible for determining the limits of their competency based on education, knowledge, skills, experience, credentials and other relevant considerations.
- 3. Protect the privacy of information obtained in the course of providing services, including electronic files and communications. Certificants and applicants shall not disclose this information unless authorized to do so by applicable legal requirements, client authorization or the written coaching agreement. The limits of privacy shall be clearly identified before coaching services begin.
- Properly use occupational credentials, titles and degrees; and provide accurate information concerning education, experience, qualifications and the performance of services.
- 5. Avoid coaching techniques that are harmful or have been shown to be ineffective. Certificants and applicants are responsible for ensuring that the techniques used are consistent with clients' emotional, intellectual and physical needs. Certificants and applicants shall inform clients regarding the purpose, application and results of the techniques, assessments and strategies.
- 6. Obtain a written coaching service agreement before initiating a coaching relationship. This agreement shall include the rights, roles and responsibilities of the parties involved, as well as the manner in which private information will be protected.
- 7. Seek supervision from qualified professionals when necessary, and provide referrals when unable to provide appropriate assistance to a client as well as when terminating a service relationship.
- 8. Ensure that clients, sponsors and colleagues understand that coaching services are not counseling, therapy or psychotherapy services, and avoid providing counseling, therapy and psychotherapy.

SECTION D: AVOIDANCE OF CONFLICTS OF INTEREST AND THE APPEARANCE OF IMPROPRIETY

BCC certificants and applicants shall:

- 1. Disclose to others, including sponsors, clients or colleagues, significant circumstances that could be construed as a potential or real conflict of interest, or any having an appearance of impropriety.
- 2. Avoid conduct that could cause a conflict of interest regarding clients or sponsors. If a conflict of interest occurs, certificants and applicants shall take reasonable steps to resolve the conflict.
- 3. Avoid engaging in multiple relationships with clients or sponsors. In situations where multiple relationships cannot be avoided, certificants and applicants shall discuss the potential effects of the relationships with the affected individuals and shall take reasonable steps to avoid any harm. This discussion should also be noted in the client's record.
- 4. Avoid sexual or romantic relationships with current clients. Certificants and applicants shall not engage in sexual or romantic interactions with former clients for a minimum of two (2) years following the date of termination.
- 5. Refrain from offering or accepting significant payments, gifts or other forms of compensation or benefits outside of the written coaching service agreement.
- 6. Acknowledge accurately the intellectual property of others with respect to all activities.



- Adhere to BCC Code of Ethics
- Obtain coachee agreement on the nature & limits of coaching
- Obtain agreement on the process of confidentiality in coaching
- Inform coachee about legal dimension of the coaching relationship
- Inform coachees of ethical standards of coaching
- Explain coach and coachee roles in coaching
- Explain coaching processes to coachee
- Obtain agreement on the parameters of confidentiality in coaching
- Obtain authorization for release of coachee information

- Clarify roles and responsibilities in sharing data prior to assessment
- ID any dual relationship issues that could influence the coaching process
- · Apply standards of practice in coaching
- Establish and maintain trust & mutual respect
- Establish & maintain confidentiality for virtual coaching
- Operate within the coachee's ethical system without violating coach's own code of ethics
- Maintain a physically safe environment for service provision
- Agree to accessibility protocols
- Maintain appropriate coachee case notes and records
- Practice liability risk management





Issues in Coaching

Dual Roles/Relationships

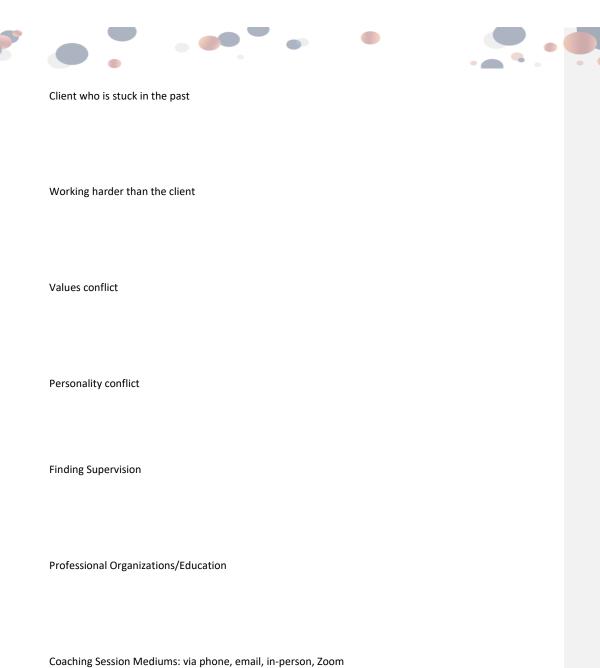
Counseling versus Coaching

Using non-directive techniques all the time

Guru versus Coach

Client's not ready to make changes

Client not taking personal responsibility







The Five Basic Needs

SAFETY & SECURITY

CONNECTION

SIGNIFICANCE

FREEDOM

JOY



- 1. These needs are written into our genetic instructions.
- You can't make one more important to you than the others. The strength of each need is
 determined through our genetic wiring. For example, you can't decide you don't like the fact your
 connection need is the highest and somehow work to make it less important. Your need strengths
 are what they are.
- 3. Sometimes when one is frustrated, you will perceive it as the most important but this is just until its satisfied. Then it goes back to the genetically-programmed level.
- 4. You feel best when you are getting the precise amount of each need that you want. Not getting enough leaves you feeling deprived and getting too much can leave you feeling over-saturated.
- 5. You never go out to directly "meet your needs." You have a picture in your head, in your perfect vision that you believe will feel good. You go after this vision and when you accomplish a part of it, it feels good and consequently meets at least one or more of your needs.
- 6. The only time it's really important to understand what need or needs a person is trying to meet is when they can't have the thing they want. Their perfect vision is not available to them, it's not available now, or the consequences are too great. When this happens, you want to uncover the largest unmet need so you can help your client get more of what they need when they can't have what they truly want. The Rolling Stones sang it best . . . "You can't always get what you want but if you try sometimes, you just might find, you get what you need."

Essential Coaching Skills

Creating a Safe Environment

Unconditional Positive Regard

- o Building Rapport
 - Eye Contact
 - Mirroring
 - Finding commonalities
 - Find something to like about your client
- o Active & Reflective Listening
- o Being Nonjudgmental
- Acceptance
- o Using Caring Habits
- o Appreciating Difference
- o Observe Confidentiality and explain its limitations
- o Avoid Arguing, Criticizing, and Blaming
- o Cultural Competence
- o Be Genuine
- Model your approach (InsideOut Empowerment™)
- o Help clients recognize and identify their strengths
- o Focus on a client's progress, rather than lack of progress
- o Accurately assess client motivation
- Discriminate between perceptions that are helpful and those that aren't, while assisting clients to transform the unhelpful ones to helpful
- o Demonstrating the correct balance between support and challenge\

Organizing

- o Gathering information
 - What is/are their goal(s)?
 - What have they done to obtain their goal so far?
 - What worked and has not worked in trying to obtain their goal?
 - What has been stopping them from achieving their goal?
 - When do they want to achieve their goal by?
 - Helps client recognize the benefits in seemingly "negative" situations



- o Simple
- o Measureable
- o Attainable
- o Makes sure the plan is the client's
- o Provide client with at least three options
- o Follow the 9 Elements of an Effective Plan

Providing Feedback

- o Asks effective self-evaluation questions.
- o Help clients focus on the areas that required attention
- o Nonjudgmental
- O Did they achieve their goal?
 - If not, what stopped them from achieving their goal?
 - Hold clients accountable for the commitments they make
 - Go back to go setting
 - If yes, what is the next step?
 - Go back to goal setting or if final step termination

Coach Characteristics

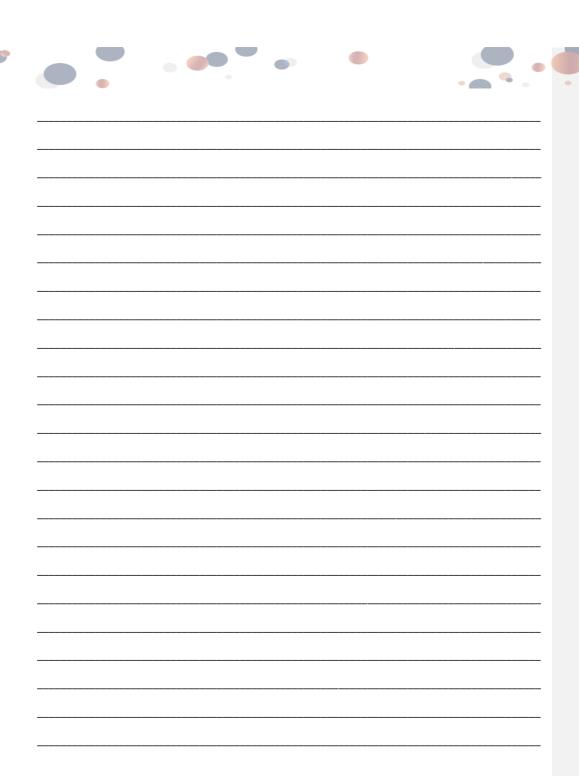
- Empathy
- Non-judgmental in the coaching process
- Compassion
- Honest & straightforward communication
- Curiosity
- Acknowledging
- Silence
- Mirroring
- Linking Process
- Paraphrasing
- Summarizing
- Encouragement
- Active Listening
- Reframing
- Humor
- Use Metaphors
- Use Ambiguity
- Offer insight
- Interpret Nonverbal Communication
- Use immediate interactions to advance the coaching process
- Use appropriate reinforcement techniques
- Challenge coachee to move beyond their comfort zone
- Generate possibilities and brainstorm



- Creativity
- Self-awareness
- Acceptance
- Effective interpersonal communication
- The acceptance of a challenge
- Self-disclosure
- Flexibility in coachee goal revision

Assist Clients To:

- Understand their current perspective
- Gain new perspectives
- Understand their belief and value systems that impact goals
- Adapt and modify their belief and value systems to achieve their goals
- Understand balance of life roles in careers, while discussing work/life balance
- Understand potential risks in decision-making and develop strategies to minimize risks
- Identify, develop and use appropriate support systems
- Assist the coachee in locating relevant information and resources
- Manage role transitions
- Build skills
- Build confidence
- Manage conflict
- Move from awareness to action
- · Identify relevant life experiences
- Take action based on data
- Create a personal action plan
- Set short-and long-term goals
- Clarifying goal(s)
- Identify potential strategies for meeting goals



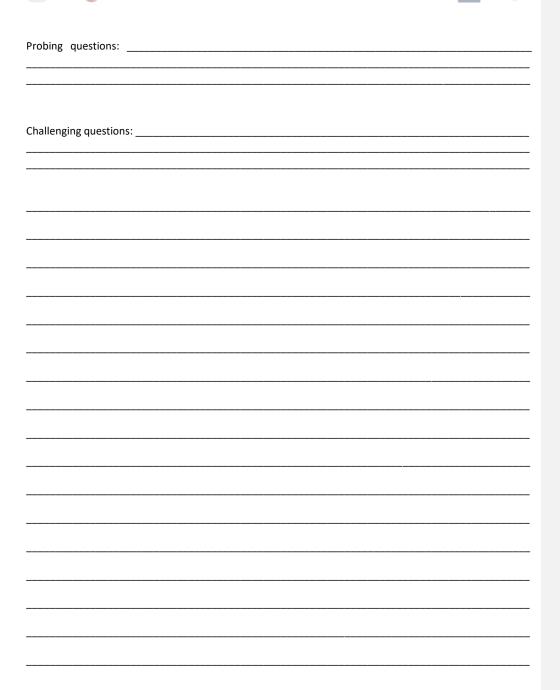






Types of Coaching Questions

Affective questions:
Analytical questions:
Connecting questions:
Clarifying questions:
Pollostino sucetione
Reflective questions:
Open-ended questions:
Exploratory questions:









Role of the Coach	Role of the Client
Help clients clarify what they want	Seek clarity on what they want
Help clients develop a vision of where they want to go	Develop a vision of where they want to go and what they wish to accomplish
Help clients discover and develop their mission and passion	Get in touch with one's passion and create a fluid mission statement
Assist clients with determining their most important values in rank order	Engage in value-clarification process and allow those values to guide the decision-making process
Assist clients with identifying what they have already done and give credit for what's already been accomplished	Do a thorough inventory of what they have already gone to prepare for and move in the direction of what they want
Create a celebration and anchor of successes	Learn to celebrate and anchor success
Assess skill level and abilities. Recommend needed skill acquisition.	Determine what deficits exist in the education/skill department and make plans to close that gap
Assist clients in self-evaluating their progress thus far with honesty and accuracy	Learn to self-evaluate with integrity
Assist clients in developing future goals	Develop future goals
Help clients break those goals down into manageable steps	Break goals down into manageable steps
Together with clients anticipate and plan for possible obstacles to success	Anticipate and plan for possible obstacles to success
Get commitments from clients on next actionable steps	Make commitments on actionable steps. Make it a stretch and challenge but definitely doable.
Assess progress and give credit for all that was done instead of focusing on what wasn't	Make progress on your action items and focus on that progress
Hold clients accountable for the agreements they make	Honor any and all agreements you make with your coach
Assist clients in making adjustments to their plans as needed	Be attentive to your course and flexible so you can make adjustments as needed
Support clients through difficult times	Don't give up
Do not accept excuses	Don't make excuses
Maintain the proper balance of support and	Use your coach when you need help, celebrate
challenge depending on client need	with him or her when you are successful and most of all, use your coach when you need inspiration
Help client uncover self-sabotage through skillfully	Openly and honestly examine any situations in
asked questions	which there may be self-sabotage
Teach clients the Triangle of Choice—change their	Learn and enact the Triangle of Choice by changing
wants, behavior, or perceptions	what you want, your behavior or your perception



Principles	Coaching Goals
The only person's behavior you can control is your own. Others may attempt to heavily influence your behavior, but the choice is ultimately yours.	Understand and take responsibility for their choices
Whatever happens in the outside world has no meaning other than the meaning you give it. You have the power to change the meaning you assign from positive to negative, negative to positive, or from positive or negative to neutral.	Understand the power of their perception and how to change it
Every behavior you choose, including your feelings, is designed to get you something you want. It is always proactive; never reactive, except for instinctual responses, for example sneezing, the startle response, or crying in response to pain.	Find the balance in all things
What you want is based on what feels good (increasing pleasure or avoiding pain). Sometimes people are able to give up what would feel good right now for something that will feel even better later but everything you do is designed to get you closer to increased positive feelings.	Distinguish and choose between what feels good right now and what will feel even better later
When you are unhappy about the conditions of your life, you should first clarify specifically what you want rather than focusing on what you want to avoid. Then, ask for what you want but if you don't get what you ask for, in order to find a peaceful resolution, you must either change what you are doing, change what you want, or change your perception. Of course, if you want to stay in your misery, you don't have to change anything at all. You can always stay unhappy if that works for you. It's your choice.	Expanding either/or thinking to a both/and approach
Much of our health, both physical and emotional, is strongly affected by our actions and our thoughts, both of which we have the power to change. If you don't like the emotions you are experiencing or your current state of health, you can indirectly affect change by changing your actions and/or your thinking.	Make the connection between their behavior and their progress or lack thereof
People often see their choices as either/or choices, instead of opening the possibilities of combining the many things we want, creating imagined dilemmas and forced choices. You can greatly increase your power by asking, "How can I do both?" For example, how can I reduce my credit card debt and still buy things on a	Uncover their self-sabotage, while learning to minimize its importance

whim when I want to? Or, how can I lose weight and	
still have chocolate?	
People do not change until the pain of staying the same	Move toward their goals at a pace that is challenging,
exceeds their fear of or discomfort with change.	yet doable, for them
People are frequently being sabotaged by thinking that	Assessing the strength of their needs while learning to
is outside of their conscious awareness that was likely	obtain the proper amounts for happiness
installed at a very young age, before they were able to	
discriminate between truth and lies. In order to	
overcome this self-sabotage, you must bring this	
thinking to your conscious awareness where it can be	
analyzed and discarded if it no longer serves.	
You are not victim to anything—not your emotions,	Accept others exactly as they are
your past, other people, circumstances, or your	
character. Once you learn and practice the tenets of	
InsideOut Empowerment™, you will have the power to	
take a different path at any moment you choose. You	
have it now but you will learn to harness its use.	

Choice Coaching Model

I. Building Rapport

- a. Safety & Security: Safe, Comfortable, Trusting
- b. Connection: Liked, Accepted, Supported
- c. Significance: Important, Listened to, Respected
- d. Freedom: Independent, Creative, Choices, Limitless
- e. Joy: Play, Relaxation, Discovery Learning

II. Assessing Readiness

- a. Does the person require time to trust?
- b. Is client ready to work?
- c. What to do first: build rapport or work while building rapport?

III. Goals

- a. Stated goal
- b. Priorities
- c. Where to begin
 - i. Easy goal for feeling of success?
 - ii. Break down big goal to smaller attainable ones?
- d. Target date
- e. Importance
 - i. Have: What would you have that you don't have now?
 - ii. Do: What could you do that you can't do now?
 - iii. Be: How would you be different?
 - iv. What changes if goal is accomplished?
 - v. What happens if it stays the same?
 - vi. 5th Degree of Inquiry (Marcus Gentry)
 - 1. Why is that important?
 - vii. What is their why?
 - viii. Sense of commitment

IV. Explore the Now

- a. Be cautious of moving into a plan too soon. Explore the now first.
- b. Current behaviors moving toward goal
- c. What behaviors, thoughts, supports, and resources are helping move in desired direction
- d. What is getting in the way?

V. The Past

- a. No power in the past; you cannot change it.
- b. Helpful when discussing lessons learned, gifts, or when mining for strengths and resources

VI. Victimized vs. Empowered

- a. Victim: Uses words like "can't" or discuss obstacles hindering success.
- b. Role of Coach: Flip victim to victor
 - i. Expand perception
 - ii. Discuss choices
 - iii. Clients are no longer a victim of:
 - 1. Past
 - 2. Emotions
 - 3. Habits
 - 4. Character
 - 5. Self-sabotaging behaviors
 - 6. Life's circumstances
 - 7. Other people

VII. Self-Evaluation

- a. What is happening in the present situation is going to work toward getting the job done?
- b. MUST COME FROM CLIENT
- c. Affirmative Answer:
 - i. On the right track.
 - ii. Other questions to consider: legal, against rules, harmful to self or others
- d. Negative Answer:
 - i. Afflict the comfortable
 - ii. Planning mode

VIII. Planning

- a. Plan tends to be more successful if it comes from client
- b. Offering suggestions? Offer at least THREE!
 - i. One option=Advice
 - ii. Two options=Ultimatum
 - iii. Three (or more) options=Choice
 - 1. Do it the same, worse, or better
 - 2. Change it, accept it, or leave it.
 - 3. Behavior, Want, Perception
- c. Plan to overcome potential obstacles
- d. Constant monitoring and adjustments (self-evaluation)
- e. Follow-up to help maximize success

IX. Other Considerations

- a. Seek Supervision if you feel stuck
- b. Do not blame the client for lack of progress
- c. It's not about you



An effective plan contains the following 12 elements:

- 1. It's chosen by the client
- 2. Simplicity
- 3. Attainable
- 4. Measurable
- 5. Specific
- 6. Repetitive
- 7. Immediate
- 8. Non-contingent (does not depend on other people)
- 9. Positive (A "doing" as opposed to a "stop doing" plan)
- 10. Time Bound
- 11. There's Commitment
- 12. Follow-up

BONUS: Troubleshoot Obstacles



- 1. You are working with a 40-year-old woman who works two jobs and takes care of her elderly father. Her goal is to lose 75 pounds.
- 2. You have a new client who is a 45-year-old woman, recently divorced, who needs to get a job to help support her three children. However, she has not been in the work force for over thirteen years. She was a television producer before she had her children.
- 3. You are also working with a 50-year-old male who was recently promoted to training new employees. He is very nervous about failing in his new position and hired you to coach him through this transition.

Relationship Habits

Disconnecting Habits

- Complaining
- Nagging
- Blaming
- Criticizing
- Threatening
- Punishing
- Bribing or Rewarding to Control

Connecting Habits

- Listening
- Accepting
- Supporting
- Encouraging
- Respecting
- Trusting
- Negotiating Differences







Identification of Client Resources

Finances

Support Systems

Knowledge Base

Desire

Energy		

Others?

Eligible Services

Decision-Making Model

- 1. Collect information about the situation.
 - a. Talk to as many people as you can.
 - b. Separate facts from opinions.
 - c. Consider facts; evaluate the opinions for whether or not they are true for you.
- 2. List the possible outcomes.
- 3. Assess the benefits, the challenges and the tradeoffs of each outcome.
 - a. Ask what will be good about this course of action?
 - b. What will be the challenges and obstacles to overcome?
 - c. What will I have to give up if I exercise this option?
- 4. Assess the available resources for implementing the steps to accomplish each outcome.
- 5. Look at the possibility of combining certain outcomes so you are giving up the least and accomplishing the most. Instead of either/or, think AND.
 - a. Ask, "Is it possible to have both?"
 - b. What could that look like?
 - c. Do I really have to give anything up?
- 6. Choose the most appropriate course of action and try it out.
- 7. After an agreed-upon timeframe, reevaluate the success of the action. Determine whether it is still the best course or should a new plan be considered?



According to Merriam-Webster Dictionary Sabotage is

- "destruction of an employer's property (as tools or materials) or the hindering of manufacturing by discontented workers."
- "destructive or obstructive action carried on by a civilian or enemy agent to hinder a nation's war effort."
- "an act or process tending to hamper or hurt."
- "deliberate subversion."

Why do clients use Self-Sabotage?

- Feeling Fundamentally Flawed
- Disloyalty and Abandonment
- Believing That More Success Brings a Bigger Burden
- The Crime of Outshining

Upper Limit

According to Gay Hendricks most people suffer from the "Upper Limit". Basically, we all have a glass ceiling and when we get close to it, we create chaos so we cannot pass through the ceiling and create our focus on the chaos rather than the success. A lot of people are afraid of success due to the four reasons why people self-sabotage.



- ✓ Each affirmation beings with the words, "I am."
- ✓ Use action working
- ✓ Be specific
- ✓ They should be brief
- ✓ They must be positive
- ✓ Use present tense
- \checkmark They need to be bout you, not anyone else
- ✓ Include a dynamic emotion word
- \checkmark End each with , "or something better."



Perception Shifting Worksheet



Business Coaching

- · Can be internal or external
- · Has regular meetings with an individual, team or department
- Assists clients in identifying their role in the success of the organization
- Helps increase clients contribution to the success of the organization in a measurable way
- · Goals of business coaching may be for the individual, the organization or both
- Helps individuals accomplish their goals within the context of the organizations to more effectively meet the organization's needs
- Creates an environment of safety, connection, respect, support, challenge, freedom and accountability
- Only provide services in their area of expertise based on their professional experience, knowledge
 of the business environment and culture and understanding of the individual and systemic change

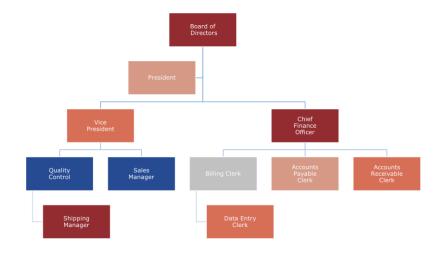
Types of Organizations

- An organization can be for profit, non-profit, and a government
- Sole Proprietorship
 - One owner
- Partnership (can be more than two)
 - Equal Partners (all partners own an equal percentage)
 - Percentage Partners (1 partner could own 75% and the other partner could own 25%)
- Corporation
 - Equal or Percentage Partners
 - Board of Directors (non-profit)
 - Stockholders (public and private)

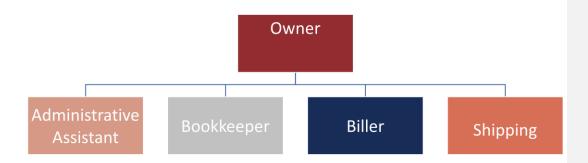
Organizational Hierarchy

- Most organizations have a top down hierarchy where the owner, president, or board of directors it
 the one at the top. However, there are some organizations with equal partners that are equally
 important at the decision making but have very different titles.
- So do not make assumptions about the organization's hierarchy and who reports to whom. Ask for the organization's hierarchy.

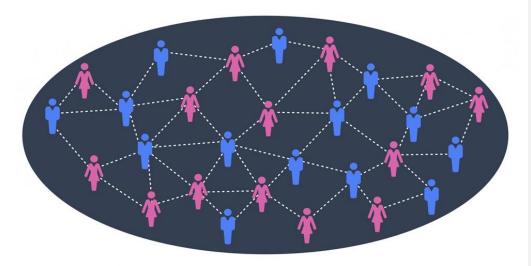




Sample Sole Proprietor Organizational Chart



Sample Flat Organizational Chart



Business Coaches Can Help Organizations with:

- Employees and/or Manager with Skill Deficiencies
- Employees or Departments Accomplish Corporate Goals
- Problem-Solving
- Self-Confidence
- Developing High Performing Teams
- Leadership and Executive Development
- Motivation for Individuals, Departments, and/or Teams
- Communication Skills and Systems
- Adjusting to Work Transitions and/or Mergers
- Achieving Healthy Work/Life Balance
- Career and Succession Planning
- Create or Improve the Corporate Culture



- You may be hired by the Board of Director or a manager of a department.
- Be clear on
 - Who do you invoice?
 - What does the organization hope to gain by hiring you as a coach?
 - Who you report to?
 - What is your rate?
 - Who is/are your coaching client(s) (individual or department)?
 - How and when do you get paid?
 - What documentation is required and to whom do you send it?
 - Privacy of information with who hired you, who you are working with, and who you are in contact with.

Corporate Culture

When an organization has chosen one of the following four cultures and aligns all their business practices toward that purpose, then they have a corporate culture. Without this, the organization is most likely drifting around, trying to satisfy all four, without ever really reaching a pinnacle of greatness in any. When one core culture is focused upon, the rest of business falls into place.

The four corporate cultures identified by Harris and Brannick are:

Customer Service: "The underlying purpose of a customer-service culture is to create solutions to meet customer needs" writes Harris and Brannick. The idea is to always meet their current needs certainly, while anticipating future needs before the customer is even aware of them. Customers always receive outstanding service and corporations aligned with this culture are constantly seeking ways to go above and beyond for their customers. Even though these companies understand the old adage that "The customer is always right" may not necessarily be true, their reality is the customer is still and always will be the customer and should be treated like royalty. Higher-end hotels often have a customer service culture.

Innovation: Harris and Brannick state, "The underlying purpose of an innovation-driven culture is to create and shape the future." People who thrive in this environment are those who can tolerate chaos, competition and making mistakes. There will be no gain without risks. Innovative companies understand this and sometimes even reward mistakes to encourage risk-taking. The primary asset in these corporations is intelligent people. They are able to hire and retain the best people in their field by constantly staying on the cutting edge. Technology companies frequently have a culture of innovation.

Operational Excellence: Harris and Brannick write, "The underlying purpose of an operationally excellent culture is to create processes that minimize costs while maximizing productivity and efficiency." Most franchises operate within this cultural framework—downplaying creativity for adherence to standard operational procedures. Standardization of processes is critical. These companies are big on analyzing data to determine where improvements can be made and then making them.

Spirit: According to Harris and Brannick, "Spirit-driven companies are obsessed with creating environments that unleash the limitless creativity, enthusiasm, and energy of people." The idea here is that one takes care of and encourages his or her employees, then business will automatically be taken care of. People working in a spirit culture develop a strong loyalty to their workplace. Sometimes they leave to try out other pastures, but often they return, realizing the grass isn't always greener on the other side. The leaders in a spirit-centered culture become servant leaders, looking out for the welfare of their people.

When a company is aligned with their core culture, then employee training, employee incentives, hiring, and retention are all centered around meeting their main corporate goal of either customer service, innovation, operational excellence or spirit.

As a business or executive coach, your client may identify a lack of, or a misaligned culture, as an area requiring attention. Having this information available will help inform the questions you ask to help your clients to gain clarity and make the changes they desire.

If is also critical that as a coach, you are sensitive to, and respectful of, the corporation's culture. You would not want to walk into a company and judge their operational excellence culture "wrong" because your personal bias is toward a spirit culture. No one culture is better than the others. Each has a place and it is up to the business leaders to choose the culture that best serves their values, their product or service, and their customers. They will then hire and retain those employees who will best align with their vision.



As a business or executive coach, you may be asked to work with a manager on improving the working conditions for employees. You may also be called in to help the manager address poor morale. Whenever there is a problem in the workplace, you want to help the manager look at the three conditions of quality to determine where he or she may want to focus his or her efforts. There are three conditions for quality in the workplace:

- 1. A Need Satisfying Environment
- 2. Usefulness of the Work
- 3. Self-Evaluation

If there are problems in the workplace, often one or more of these areas need attention.

I. NEED-SATISFYING ENVIRONMENT

Survival
Connection
Significance
Freedom
Enjoyment

II. USEFULNESS

WIIFM stands for "What's in it for me?"

III. SELF-EVALUATION

Honest – No fear Accurate – Standards of Quality



Use this worksheet whenever a supervisor you are coaching is not getting the results they want from an employee. First, ask them to write a brief synapsis of the situation and then, answer the self-evaluation questions that follow. Depending on their answers, you will be congratulating them on a job well done, challenging their perceptions or developing a plan to do things better in the near future.

Briefly describe the situation:
Does this person feel safe at work and with you?
Does this person know you care about them?
Does this person have good relationships with co-workers?
Is this person connected with upper management?
Does this person understand his/her role in the mission and vision of the company/agency/group?
Does this person know he/she is important to you and the job?



Creating Systemic Change

1. Creating the Vision

- a. Have Do Be
- b. Five Degrees of Inquiry

2. Create a Plan

- a. Who will do what by when?
- b. Ripple effect
- c. Align policies, procedures and practices

3. Share the Vision

- a. Get Feedback from Key Players
- b. WIIFM
- c. Assess motivation and perception of change
- d. Discuss pros and cons
- e. Acknowledge challenges; extol virtues

4. Business Alignment

- a. Business practices
- b. Policies and Procedures
- c. Corporate Culture
- d. Mission, vision, and values



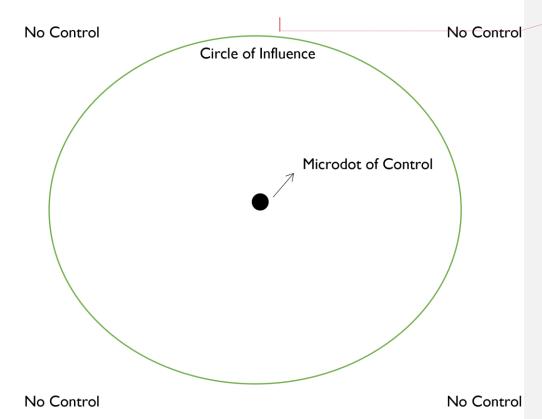
As a business coach, you may be engaged to help a business leader create change in their company, organization or unit. Often change meets with resistance for a variety of reasons. Most managers, when confronted with resistance in those they supervise, will jump to #4 without ever assessing the first three areas. Your job as a business coach is to help them consider the first three reasons and then to take responsibility for their part if #4 turns out to be the actual reason. When managers believe their people are resisting just because they don't want to do something, the response is very different than if they are more generous in their assessment.

Often when someone is requesting a change and they meet with resistance it is one of the following issues:

- 1. Do people know what they are being asked to do?
 - Further explanation, demonstration, training or a combination
- 2. Do people know how to do it?
 - Training and/or mentoring
- 3. Does the environment support the changes being asked?
 - Adjust the environment
 - Accept the limitations and plan accordingly
- 4. Does the person want to do it?
 - What's in it for them?
 - Relevance and usefulness of making the change

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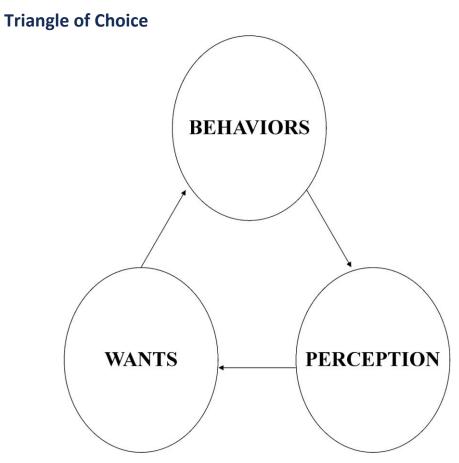




Commented [KO1]: I don't think this is centered.











Get the Knot Over Your Dot

Person A



This represents what you want

Person B



This represents what you want





Solving Circle

- 1. Conflict
- 2. Invitation Mindset
- 3. Negotiation
- 4. Win/Win/Win Solution



Some Coaching Assessments

- 1. Riso-Hudson Enneagram Type Indicator (RHETI)
 - ✓ Nine types that discuss the basic fear, basic desire and key motivators of each type
 - ✓ https://tests.enneagraminstitute.com/orders/create
- 2. Big Five Personality Inventory
 - ✓ Five domains with six subcategories to each
 - ✓ Most scientifically validated and reliable model to measure personality
- 3. 5 Love Languages
 - ✓ Five types of love languages
 - ✓ Provide important information about a person's love language and is particularly relevant for couples and parenting coaching http://www.5lovelanguages.com/start
- 4. Clifton Strength Finders Assessment
 - ✓ Discover strengths and how to use them to thrive in life and work
 - ✓ Used in both life and business coaching
 - ✓ <u>bit.ly/CliftonBasic</u>
- 5. DiSC Personality Testing
 - ✓ Provides a profile of work behavior
 - ✓ Their free version has 12 questions and provides a quick response; there is a full, paid version available
 - √ https://discpersonalitytesting.com



6. Self-Directed Search

- ✓ Career assessment and exploration tool
- \checkmark Matches aspirations, activities and talents to the career and education choice that fit best
- ✓ bit.ly/Self-DirectedSearch
- 7. Academy of Choice's Digital Basic Needs Assessment

 ✓ Provides an idea of how high each need is

 ✓ http://www.academyofchoice.com/needs-assessments





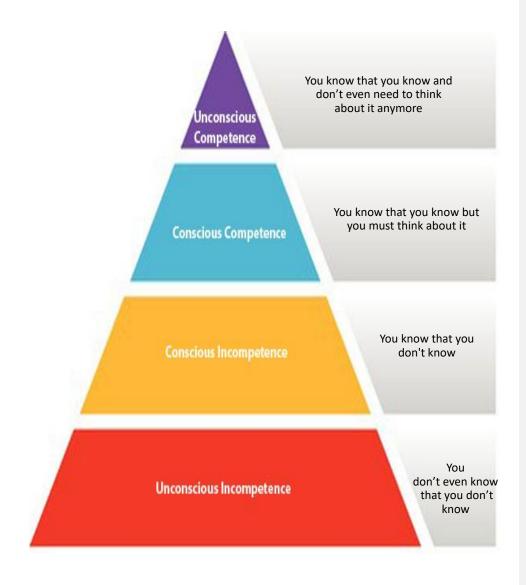
The Johari Window

	Known to Self	Not Known to Self
Known to Others	OPEN	BLIND
Not Known to Others	HIDDEN	UNKNOWN





Four Stages of Competence







Assessing Client Motivation Prochaska & DiClementi's Stages of Change

- 1. Precontemplation
- 2. Contemplation
- 3. Preparation
- 4. Action
- 5. Maintenance
- 6. (Relapse)





Self-Assessment of Basic Needs

On this form, please indicate the intensity with which you desire/need each need from 1-5, with 1 being the lowest and 5 being highest.

Connection This includes the need for love, intimacy, friendship, and being a part of a group/organization. Relationships can range from intimate to friendship to acquaintances.	1	2	3	4	
Significance					
This includes the need for a sense of worthiness, empowerment, feeling competent and valued. Achievement and recognition are characteristics of this need as is the desire for competition.	1	2	3	4	
Freedom This includes the need for choice, independence, creativity, and autonomy.	1	2	3	4	
Joy This includes the need for fun, play, pleasure, laughter, hobbies, discovery learning and relaxation.	1	2	3	4	
Safety & Security This includes the need for food, water, safety, security, shelter, health, reproductive sex (for survival of the species), and finances.	1	2	3	4	





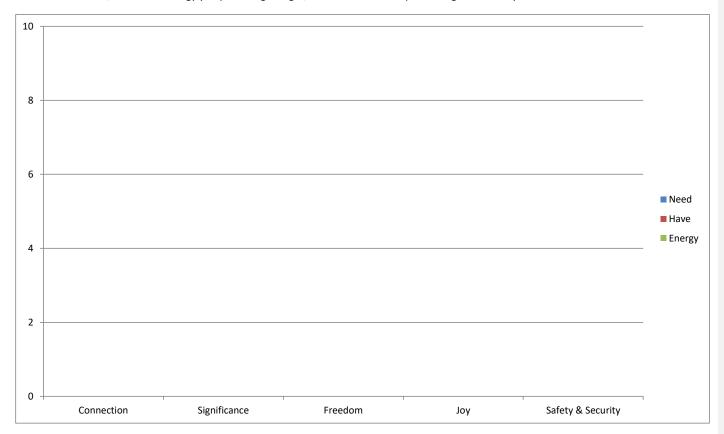
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On this form, please indicate the intensity with which you desire/need each need from 1-5, with 1 being the lowest and 5 being highest.

Connection This includes the need for love, intimacy, friendship, and being a part of a group/organization. Relationships can range from intimate to friendship to acquaintances.	1	2	3	4	
Significance This includes the need for a sense of worthiness, empowerment, feeling competent and valued. Achievement and recognition are characteristics of this need as is the desire for competition.	1	2	3	4	5
Freedom This includes the need for choice, independence, creativity, and autonomy.	1		3	4	_5
Joy This includes the need for fun, play, pleasure, laughter, hobbies, discovery learning and relaxation.	1		3	4	
Safety & Security This includes the need for food, water, safety, security, shelter, health, reproductive sex (for survival of the species), and finances.	1	2	3	4	_5



Draw three vertical bars for each need: the first one representing how much of the need do you want in your life; the second one representing the amount of time, effort and energy you put into getting it; and the third one representing how much you have.

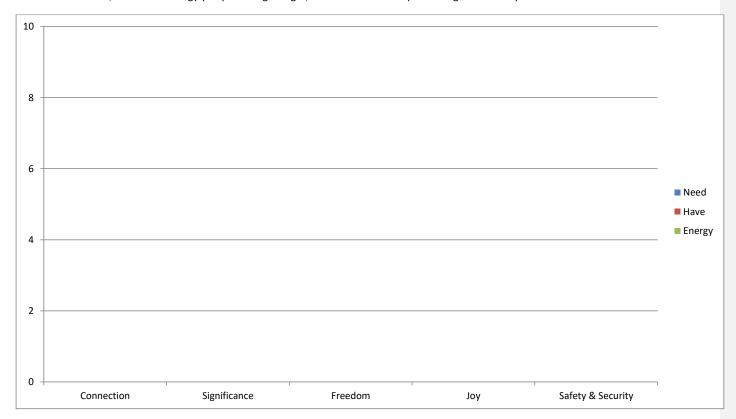






Pete's Pathogram

Draw three vertical bars for each need: the first one representing how much of the need do you want in your life; the second one representing the amount of time, effort and energy you put into getting it; and the third one representing how much you have.







Other Assessment Considerations

- 1. Identify coachee readiness for coaching
- 2. Recognize when the coachee needs a referral for other professional services
- 3. ID any past coachee experience with helping services
- 4. Clarify Coachee decision-making processes
- 5. Identify coachee's preferred processes for meeting goals
- 6. Assess the culture of the coachee's environment
- 7. Explore differences in organizational environments
- 8. Clarify coachee attitudes toward work and workers
- 9. Clarify coachee personal parameters (e.g. values, beliefs, needs, interests, tendencies) related to choices and alternatives
- 10. Clarify coachee's current use of alcohol and/or other substances
- 11. Assess coachee strengths related to goals
- 12. Use various assessment strategies appropriate to the coaching process and the goals of the coachee



- 1. Alternative coaching approaches for coachees with special needs
- 2. Sexual orientation or gender factors
- 3. Racial factors
- 4. Health factors
- 5. Multicultural factors
- 6. Developmental factors
- 7. Spiritual factors
- 8. Potential for coachee to harm self and/or others
- 9. Learning issues
- 10. Behavioral issues
- 11. Relationship issues
- 12. Any other issues/factors



- 1. Integration of theories, strategies and models in assisting the coachee.
- 2. Be aware of different modalities of delivering coaching services.
- 3. Use coaching-related research.
- 4. Prepare an estimated timeline for coaching services.
- 5. Correspond as needed with the coachee.
- 6. Seek feedback from coachee regarding the coaching process.
- 7. Collaborate with the coachee on appropriate termination.
- 8. Clarify roles and responsibilities with any sponsor, as appropriate.
- 9. Conduct post-coaching follow-up activities, including evaluation of services.
- 10. Consult with other professionals when appropriate.
- 11. Maintain a referral network.



- 1. Seek mentoring as needed.
- 2. Seek supervision as needed.
- 3. Self-assess strengths, development gaps and limitations as a coach.
- 4. Identify any personal barriers to the effectiveness of the coaching process.
- 5. Assess your effectiveness as a coach.
- 6. Maintain and expand needed knowledge and skills with continuing education.
- 7. Promote awareness of coaching.
- 8. Advocate for the practice of coaching.

Commented [KO2]: I think this would be better vertically but I don't know how to do that.



Maintaining your Credential Board Certified Coach



Credential Maintenance Requirements

Your Board Certified Coach (BCC) certification is valid for five years as long as you comply with CCE policies and procedures. To maintain your certification, you are required to recertify at the end of five years. The chart below summarizes the steps you are required to take each year to maintain your certification with the Center for Credentialing & Education (CCE).



*A late fee of \$15 will be applied if annual maintenance fee is not paid by due date

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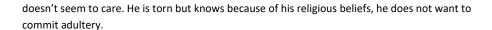
Feel free to use any of the following scenarios whenever you are asked to do skills practice or make up situations on your own.

Life/Wellness Coaching:

- Your client is in between relationships and realizes she has never been without a significant other
 for more than two weeks. She does not think this is normal and she really wants to use this time
 between relationships to work on her becoming the best she can be so she will be able to
 eventually attract the man of her dreams. However, she realizes she has a long way to go before
 she is ready to get into another relationship.
- 2. A young male, 24, is having a difficult time becoming healthy. He is smoking up to 2 packs of cigarettes a day, rarely exercises, and eats poorly. His grandfather just died from lung cancer. He is now scared that if he continues down this path, he may end up very ill and die. He's unsure of how and where to start.
- 3. A client comes to you because she wants to lose 50 pounds. She has been struggling to lose the 50 pounds because as soon as she has a bad eating day she stops eating healthy. She feels that just because she had one bad day, she cannot eat healthy long enough to lose 50 pounds.

Relationship Coaching:

- 4. A client comes to you as the mother of a 15-year-old daughter and she has no idea how to communicate with her. Your client says she can't even talk to her daughter without yelling at her and her daughter will not talk to her about anything. You also need to know that your client was raised by Italian immigrants, and they solved all their issues by yelling at each other. When your client was growing up, she did not talk to her own mother because all she did was yell at her.
- 5. A religious man comes to you for coaching because he is on the verge of engaging in an affair and wants to resist the temptation. He and his wife have been married for 11 years and their sex life has greatly diminished. He reports they have sex about once every 3-4 weeks and when they do, his wife acts as if it is just one more thing on her To Do list. She seems impatient to get it over with so she can go to sleep. He is a case worker in a foster care agency, working with many female coworkers. There is one, in particular, who obviously finds him attractive, knows he is married and



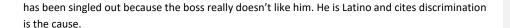
6. A mother comes in with her 6-year-old daughter. The mom states that her daughter can be defiant at home, isn't doing well in school, and is having difficulty following directions and being respectful. The mother realizes that she loses her patience quickly where her daughter is concerned. Mom will often yell to get her daughter to comply or she tries to bribe her with rewards or punishments to get her to behave the way mom wants. She is coming to a coach for help with parenting because she realizes her style is not only ineffective, but also, could be the cause of the negative behaviors in her daughter.

Business/Organizational Coaching:

- 7. The client is a business owner who is having difficulty breaking through her income barrier. She believes she is engaging in self-sabotage but isn't sure of its origin. When she started her business, she made \$30,000 the first year, \$60,000 the second year and \$120,000 the third year. She has been in business now eight years and has yet to surpass the \$120,000 pinnacle. She has hired you to help her determine what is getting in her way.
- 8. A client comes to you because he just opened a business and created a website, but it has been under construction for 8 months. He has no idea of what to put on the website or how to use it to benefit his company. He believes the website is the best way to market but has not yet been able to utilize it.
- 9. A woman, 35, comes to you for some help with her career. She has been working in a doctor's office as clerical help for the past 15 years. She gets paid well with great benefits. However, she is extremely unhappy and seriously discounts her skills. She has a high school diploma and never went to college or a trade school. She isn't sure what she wants to do or how to figure that out. Also, through a needs assessment, you know that she has a high need for survival with her focus being on financial security and safety, which may be a reason for her staying so long at her current job/not taking a risk.

Non-Voluntary Clients:

10. You have been hired by management to coach a salesperson. He is not meeting his quota and management believes he is not good at developing rapport with clients. You have been called in to coach him to improve in this area, but the client is not sure why he is being coached. He thinks he

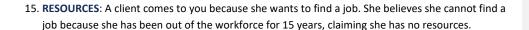


- 11. A new female owner of a company came to you needing a coach for the business she just purchased. She has ten employees that stayed on after the purchase that are not happy and possess a lot of negative energy. These employees feel that they are stuck and do not have a choice in being happy with their new owner. She is coming to you for coaching to develop a plan to either inspire these workers to "get on board" or let them go.
- 12. A teenager is told by his parents that he needs to see a coach or he will be kicked out of the house. They prefer he see a coach instead of a counselor because they don't like the stigma attached to being in "therapy." They are "fed up" with his behavior: he ditches school, smokes pot, fails classes, doesn't help around the house, and will do what he wants when he wants (stays out past curfew, swears, is disrespectful, etc.). The boy doesn't think he does anything wrong because "things at home are fine" and "when will I ever need algebra?" However, he has agreed, reluctantly, to go for coaching because the consequence of not going is being homeless.

Specific Exercises:

These scenarios are specially for certain assignments from your modules. They will be referenced in your directions for skills practice at the appropriate time. Again, feel free to use these scenarios or choose a situation from your own experience to practice, as long as it meets the criterion of the exercise.

- 13. **DECISION-MAKING PROCESS:** Client is a middle manager. Administration brought you in to help her improve her supervision skills. She was recently promoted to run the unit where she used to be a member and is now supervising her former co-workers and friends. Management believes she is not being firm enough in her expectations and that her unit's performance has decreased since she took over. Your client agrees this is a problem but she doesn't think she can overcome it. She is attempting to decide whether she should look for a new job, ask to be transferred to another unit or ask to be demoted back to her original position. There may be other options she hasn't considered but you will be working through the decision-making process with her to choose what will be best for her in her situation.
- 14. **GRATITUDE:** Client is the "gloom and doom" person—the typical victim. Everything in life is unfair. No one is supportive. The client can't accomplish his or her goals because other things and people are always getting in the way. Client can come up with an exhaustive list of everything that's wrong in his or her life but has very little investment in overcoming these obstacles.



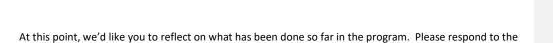
16. WIN/WIN SOLUTION: You were hired to work with a manager and his administrative assistant on several issues but the one you are focusing on for this exercise is that the manager wants Valerie's day to start at 8:30 and Valerie doesn't want to begin until nine so she can drive her children to school. She also asks to leave early one day a week to attend her children's sporting events. On other days, she does not mind staying late or taking work home. She is a great employee who gets her work done by the deadline with good quality.

Her manager, Judith, does not understand Valerie at all. When Judith began her job, she gave up time with family, hiring a nanny to care for the needs of her children. She hated missing things but knew if she wanted to get ahead, she needed to work just as hard as the men and prioritize work. She is a take charge person who wants what she wants when she wants it. She wants Valerie to be in at 8:30 am each day and work till five or later if need be.

Have them use the negotiating techniques you learned from watching the Rubber Band Activity video.

17. VALUE CHALLENGE: Client is a female who comes to you because her husband wants them to be polyamorous, the practice, desire, or acceptance of having more than one intimate relationship at a time with the knowledge and consent of everyone involved. She is not sure she can do that, but she loves her husband and wants to be accepting. She is asking for your help in transitioning to this lifestyle without developing jealousy or resentment.





1. List three major pieces you learned today.

a.

following statements.

b.

c.

2. State what further explanations and clarifications you would like.

3. What questions do you still have regarding coaching that haven't been discussed yet?



4. Does the course delivery address your learning style?

5. Which Basic Needs are being met throughout this training thus far?



At this point, we'd like you to reflect on what has been done so far in the program. Please respond to the following statements.

- 1. List three major pieces you learned today.
 - a.
 - b.
 - c.
- 2. State what further explanations and clarifications you would like.

3. What questions do you still have regarding coaching that haven't been discussed yet?



4. Which Basic Needs are being met throughout this training thus far?

5. Which Basic Needs are being met throughout this training thus far?





1. List three major pieces you learned today.

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c.

2. State what further explanations and clarifications you would like.

3. What questions do you still have regarding coaching that haven't been discussed yet?



4. Does the course delivery address your learning style?

5. Which Basic Needs are being met throughout this training thus far?





Reflection and Review

At this point, we'd like you to reflect on what has been done so far in the program. Please respond to the following statements.

- 1. List three major pieces you learned today.
 - a.
 - b.
 - C.
- 2. State what further explanations and clarifications you would like.

3. What questions do you still have regarding coaching that haven't been discussed yet?



4. Does the course delivery address your learning style?

5. Which Basic Needs are being met throughout this training thus far?





Coach Coaching Evaluation

Name (optional)	Date:
-----------------	-------

Section Evaluation:

			Very Somewhat Not Useful Useful Useful		•				Too	Long (T	Time Spent L), Too Short (1 ut right (JAR)	ΓS)
l.	Coaching Basics	7	6	5	4	3	2	1	TL	TS	JAR	
II.	InsideOut Basics	7	6	5	4	3	2	1	TL	TS	JAR	
III.	Life/Wellness/Relationship Coaching	7	6	5	4	3	2	1	TL	TS	JAR	
IV.	Business/Organizational Coaching	7	6	5	4	3	2	1	TL	TS	JAR	
V.	Business Basics	7	6	5	4	3	2	1	TL	TS	JAR	
VI.	Evaluations	7	6	5	4	3	2	1	TL	TS	JAR	

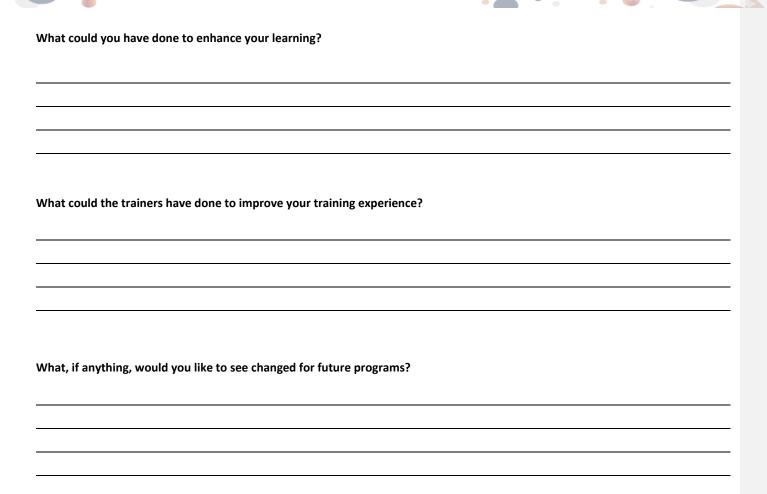
On a scale from 1 to 7, with 7 being the highest-how would you rate the following:

	High	1				Low		
Overall Training	7	6	5	4	3	2	1	
Instructors' Knowledge of Content	7	6	5	4	3	2	1	
Instructors' Interest in Participants	7	6	5	4	3	2	1	
Usefulness of Handouts		7	6	5	4	3	2	1

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Usefulness of Content	7	6	5	4	3	2	1		
The Overall Training Environment	7	6	5	4	3	2	1		
What did you like most about the program?									
Name at least three things you learned or rele	arned in	this pro	ogram.						
Name at least three things you plan to use in y	our coac	hing pr	actice.						





Additional Comments:	