Chapter 4 – Coaching Agreements 1: Setting the Long-Term Agreement

A miracle of the human mind is its ability to run on autopilot. Daniel Khaneman calls this process “Cognitive Ease” and associates it with “System 1 Thinking.”[4] This autopilot mental process allows people to make split second decisions on the highway and recall names with faces at a dinner party. Also, when we begin to hear about a challenging problem, our minds are automatically looking for a path that allows us to break out of the problem as quickly as possible. However, coaching exists because System 1 Thinking cannot provide solutions to problems where our minds do not have a predetermined path to success. Often, our clients need help engaging their deeper, more strategic level of thinking–Khaneman’s ”Thinking Slow” and “System 2 Thinking.”

This overly simplified explanation of cognitive ease is shared here to highlight the importance of co-creating a coaching agreement. To the ICF, this is “Coaching Competency 3: Establishes and Maintains Agreements.”

The ICF’s definition of this competency is: “Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans and goals. Establishes agreements for the overall coaching engagement as well as those for each coaching session.”[5]

When considering the entire ICF competency model, this is where coaches will find the most expectations around having a structured conversation. Often, when people learn about coaching it can appear to be an approach that does not use a structure, but simply “follows the client.” The reality is that every coaching session follows a structure, and it is up to the coach to intentionally partner with their client to co-create that structure.

In my experience as a mentor coach and coach assessor I have noticed a belief that some coaches hold that they do not believe in the ICF’s approach to co-creating expectations for the coaching session or coaching relationship because it deviates from following the client’s lead. However, when observing and assessing coaches who hold this perspective, they inevitably use a structure that represents the questions and observations that are most familiar to them

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[4] Thinking Fast and Slow Note
[5] https://coachingfederation.org/credentials-and-standards/core-competencies

rather than what is most helpful for the client as a unique individual. This sort of coaching follows the coach's own need for cognitive ease. Without partnership, the coach's automatic thinking begins to steer the ship, often to ideas and solutions that reflect the coach's understanding and worldview.

This chapter explores the elements of the ICF's Competency 3: Establishes and Maintains Agreements with a particular eye on co-creating the coaching agreement for an entire coaching relationship. Chapter 5 will explore the specific elements and markers of success that focus more on the coaching agreement for individual coaching sessions.

1. Explains what coaching is and is not and describes the process to the client and relevant stakeholders

Whether in the coach's marketing materials, sales conversations or first sessions with sponsored clients, a coach's language should make it clear that coaching stands out as co-collaborative, partnership-driven, focused on the client's agenda over the coach's expertise, empathetic and adaptive. Coaches need to be able to articulate the difference between coaching and other helping conversations modalities. There is no one right script to describe coaching and how it differs from therapy, mentoring, consulting, advising, etc. Instead, coaches should consider how they can best describe these differences in ways that connect with their target audience and individual clients.

The following examples provide some helpful takes at describing coaching, but every coach should make these words their own while honoring the nature of coaching.

Describing Coaching to a Client Curious about Coaching

Coaching is like having a second mind helping you think more strategically about any challenges or opportunities you are facing. My role isn't to provide solutions that work for me or others, but rather help you come up with your own solutions and ideas. Sometimes I may offer my perspective, a tool that might be useful or ideas that have worked for others, but anything that I offer is meant to help you come up with what works for you as a unique individual. My work will be to help you clarify what you want from coaching as a whole and what you want from each session, then ask open questions, offer space to think, and reflect your language back to you while keeping an eye on your original objective for the session. By the end of each session we focus on actions you want to take, ideas you want to experiment with, and how you will hold yourself accountable to your commitments from these sessions. What thoughts or questions do you have about coaching before we get started?

Describing Coaching to a Company Leader Considering Coaching for their Team Members

Coaching helps team members carve out dedicated strategic thinking time to help them prepare for difficult decisions, challenges where there is no clear right answer, and consider how to best plan for the future. While coaches can offer tools, coach around assessments and share what has worked for other clients they have worked with in the past, coaches are more focused on helping the client create novel solutions that take into account what the client recognizes about themselves, the people they work with, and their specific situations. Coaching also helps create a sense of professional progress as the client identifies personal and professional goals that support their sense of fulfillment while positively impacting their motivation, work outcomes and working relationships.

Describing How Coaching Differs from Mentoring

Mentors tend to be someone who is on a similar path as the client (or mentee) but further down that path. This allows mentors to share their own stories of what they did when they were in the mentee's situation. Great mentors tend to couple this sharing of experience with a coaching approach helping their mentee focus on coming up with their own version of a solution. Pure coaching is different in that the coach does not tend to share their own ideas. Instead, coaches help a client form their own solutions, which is particularly helpful when the client is dealing with a unique challenge or doesn't have a personal connection they feel comfortable relying on as a mentor.

Describing How Coaching Differs from Therapy

Coaching is not therapy, even though the approaches can feel similar. Most, but not all, therapists are often approached to help with emotional and mental healing. Often this process focuses a bit more on reflecting on the past and how to effectively address the challenges of the past in the present or future. Coaching almost exclusively focuses on the present to future and works with clients who are at a state of being emotionally and mentally well. Coaching helps clients stretch themselves further towards their goals while considering who they want to become and how they will grow to be a better version of themselves.

Describing How Coaching Differs from Consulting and Advising

Consulting and advising supports clients who could benefit from working with a more direct approach working with a subject matter expert. Coaching focuses on the client as the subject matter expert and partners with the client to help them create their own solution. While many consultants might use a coaching approach as part of their work, most are expected to provide a solution for the client. Coaches believe that the process of coming up with one's own solution provides a great learning experience that can be applied to future challenges.

Language to Avoid

Coaches should avoid focusing on perceived (and often inaccurate) drawbacks from any other approach to helping conversations. For instance, "While therapy only focuses on the past and how people are broken, coaching focuses on helping people move into their future successfully." Or, "Consulting assumes that the consultant can diagnose and create a solution for a client as an expert who knows more than the client, while coaches realize that the client is the real expert."

Not only do these examples demonstrate a lack of understanding and empathy, they also can easily offend a client who may have personal relationships with therapists or who may have had some great experience with consultants. Also, the reality is that many mentors, advisors, consultants and therapists offer skills that are similar or drawn from the coaching space. Coaches should focus on common distinctions of approach and expectations rather than framing coaching as the superior methodology.

2. Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders

Coaches should not only inform their clients and potential stakeholders what the expectations are for a coaching contract. The coach should cultivate open dialogue around any questions that come up when describing what coaching is and what it is not. Coaches should be prepared to bring a client along into the coaching process. Sometimes a client or stakeholder offers pushback on the open nature of the coaching process. In these cases, coaches should often be prepared to speak to these concerns without pushing directly against the client or stakeholders. This way, there can be an agreement around how coaching will provide what is needed for the client while maintaining the ethical boundaries of coaching. Consider the differences in tone in the following examples:

Pushing against a question or concern

Unfortunately, coaches do not prescribe solutions to their clients. Instead, we expect clients to do the work of strategic thinking so that whatever we come up with is fully customized to your work and life. If you would like to work with a coach, you will need to come to each session expecting to come up with your own ideas that will work best for

Pulling with a question or concern

Many clients appreciate coaches helping them more directly as a coaching experience begins. It’s an approach that is very different than what they are used to, so coaches are trained to offer more strategic and open exploratory coaching as well as more guided coaching using tools and exercises that have worked for some of their other clients. I would be happy to work with you in a first session to determine what tools, exercises and models might be best suited for our work together. I will also keep coming back to the idea that you are a unique individual with unique challenges that you face. With that in mind, anytime I offer something to guide the process I will also ask some questions to help make these ideas your own. Over time, you might find the fully open and strategic form of coaching might be more helpful to you. For now, we can start with a bit more of a guided process. How does that sound to you?

3. Reaches agreement about the guidelines and specific parameters of the coaching relationship such as logistics, fees, scheduling, duration, termination, confidentiality and inclusion of others

The business and ethical clarity of the coaching agreement is part of what makes the experience safe and useful for the client. Coaches should have clear expectations that they can share with others around each of the items above while also being able to make reasonable adjustments as appropriate (e.g. offering fair discounts). These items should be discussed before a coaching engagement begins and adjusted as needed. Additionally, coaches should consider offering clarity on their fees and offers upfront even in their marketing. This is not directly required by the ICF, but can support a sense of fairness and inclusivity.

4. Partners with the client and relevant stakeholders to establish an overall coaching plan and goals

This element of Maintaining coaching agreements needs to be considered in light of other competencies, particularly Coaching Ethics. Coaches are not expected or encouraged to perform coaching in an environment where the client's manager, company, family, etc. are openly provided all the details of the coaching engagement; however, there are many engagements where offering partnership between the coach, client and other stakeholders can be beneficial for the overall coaching engagement. Whether this is sharing the general details of the coaching goals in partnership with the client, asking the client what they would personally like to share in their own progress updates, providing information based on assessments that the client may take at the beginning of the engagement and retake as they make progress with the coaching–all of these options and any others should be done in full partnership and agreement with the client. Coaches should also make clear any expectations to share details about the client's coaching journey with other stakeholders. To not disclose these details or to only disclose them after the engagement has begun demonstrates a significant breach of coaching ethics, opens the coach to legal liability and ultimately makes the coaching environment unsafe for the client.

5. Partners with the client to determine client-coach compatibility

Coaches should step into an engagement with the desire to first serve the client, then serve their business needs. This is particularly important as the coach and client determine if they will be a good fit to work with one another. This element, however, is not meant to set the expectation that the coach and client are similar to one another in any particular way. Oftentimes having a different thinking style, identity, background, etc. can be a benefit to the coaching. Coaches should openly discuss how the client feels about the connection during the initial connection conversations with the client and check in on this compatibility from time to time during the engagement. If the coach or client senses a need to pivot towards a different coach, the coach should help the client openly explore what they would prefer to look for in a new coach.

Elements 6-10: These will be explored in chapter 5 as they relate to the individual coaching session.

Element 11: This element is focused on how to end a coaching relationship effectively and will be explored in chapter 12.

WE START Model of Establishing the Coaching Agreement

Consider the following model as you

1. Welcome and Introduction - Welcome the client to the coaching experience and briefly introduce yourself, then invite the client to introduce themselves. The client will often mirror the types of things the coach shares about themselves and even the length of the introduction. During this first exchange, the coach may take note of a particularly verbose client or a client who seems to be hesitant to share as much as the coach shares. These early insights might be helpful to keep in mind as this first session begins.

2. Explain Confidentiality and Coaching - Here the coach should articulate the expectations the client should have around confidentiality while also sharing the nature and process of coaching (from Competency 3’s elements 1-5). The coach should allow time for the client to share their questions or concerns about the coaching process during this time.

3. Story - Encourage the client to share relevant parts of their personal and professional story so far. Coaches should generally avoid prompting a client to share too much from their story, but in a first session this storytelling can be a helpful way to build trust and understanding between the coach and client while helping the coach recognize meaningful language the client uses to describe themselves and their situation.

   Sample Questions:
   - What’s been your experience so far in your professional journey?
   - What is your experience like now?
   - Where do you see yourself going in the future?
   - What is the biggest challenge you will need to overcome?
   - How do you see coaching supporting this journey?
   - What do you want to get out of coaching?

4. Transformation - Ask questions to help the client consider what they would like to see change as a result of their coaching. The client may begin responding by sharing what they would like to see change in others or in their circumstances. In response, the coach should offer questions about how the client hopes to grow in order to overcome the things that they cannot directly control or change. Coaches should take note of the meaningful language the client shares here and use this language to deepen the exploration.

   Sample Questions:
   - What is the significance of this journey?
   - Why is _______ important to you?

- What is so important about seeing this shift in your life?
- What do you want to see change by pursuing this journey?
- How do you want to have changed as a human being through this journey?

5. Areas - The 7th element of Establishing and Maintaining the Coaching Agreement reads, “Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish in the session.” While this element points to the agenda setting for an individual coaching session, it is also important to apply to the relationship agreement. The coach should ask what areas or subtopics the client expects they will need to address as part of making progress with their long-term goals for the coaching program. These areas should be noted by the coach to help the coaching process throughout the coaching relationship.

   Sample Questions:
   - Over the length of our coaching, what are some of the sessions going to need to cover?
   - What are some of the skills you most want to work on to help you get there?
   - What are some of the pieces of the puzzle we need to work on to build the big picture over the next 6 months?

6. Results - Element 3.8 reads “Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement or individual session” and will be explored further in the following chapter. The coach should ask questions that help the client consider how they will measure the success of the coaching as a whole and around some of the key areas they want to address with the coaching. While a coach can ask a simple question about what the client would like to see by the end of the program, coaches should use the client’s meaningful language they have shared up to this point to help the client consider both tactical and transformational results they want from coaching.

   Sample Questions:

- What is the specific target you want to hit by the end of the coaching arrangement?
- How would you like to measure the success of the coaching as we work on these topics?
- As you consider your role in the change you want, what are going to be some milestones that help you know you are personally on track?

7. Team Up - Once the relationship agreement has been established, the coach should consider wrapping up the first session or help the client establish an individual coaching session agreement. If the session has about 5-10 minutes remaining after establishing the relationship agreement, the coach might consider asking questions about what the client would like to start with by the next coaching session. If the session has 20 minutes or more, the coach can begin an individual session START process to set a brief session agreement with the remaining time. This individual session START model is explored in chapter 5.

Preparing for Challenges to Establishing the Coaching Agreement

Client misunderstanding

A common challenge for new coaches happens when the client is under the impression that the coach is to act as an expert who guides the focus of the coaching conversation. In a way, they are correct–coaches are experts in supporting the client in determining the best use of the coaching. Clients are sometimes not clear on their responsibility as partners in the process of establishing the initial coaching agreement.

The best way to prepare for this challenge is to have a more effective preventative measure based on the coach's marketing and sales process. The coach's website to frequently articulate the distinctions between experts/consultants and coaches while highlighting how a coach may use tools and resources to support the client's agenda. The coach should consider articulating the benefits of tailoring concepts that might work generally (advice giving) with customizing these concepts towards the client's unique experience (coaching). Coaches should also consider providing demo recordings of their coaching and/or providing a demo session to prospective clients before they sign their coaching contract. It is better for the client to have clarity on the coaching approach before they pay money for it.

If a client shows up to a first session still having just a bit of confusion on how coaching works, the coach should be prepared to answer questions the client might have and clarify the purpose for the different elements of the coaching process (Agenda setting, open questions, silence/spaciousness, etc.). This "learn as we go" approach should be handled with care so the coach doesn't spend too much or too little time on educating the client on the way coaching works best.

Lack of clarity between sponsor and client

When selling coaching directly to a client, the client tends to have a fairly good grasp on what to expect from the coaching experience. An effective coach will have guided the client to this understanding through their marketing and sales process, perhaps even offering a demo coaching session before the client signs a contract.

On the other hand, coaches should be prepared for a bit of confusion when beginning to serve a client who is being provided coaching by a sponsor. Sponsored coaches does work best when the coach or coach's organization partners with the sponsoring company so that the leadership experiences the coaching, knows how to communicate the expectations of the coaching and shares information in meetings and messages on the expectations of the coaching on a regular basis before the service period begins. However, there will often still be sponsored clients who did not attend the meetings or read the messages leading them to still be in the dark when it comes to the definition of coaching and why they are being provided coaching. A coach can easily find themselves in a session where a sponsored client believes the coach is there as a remedial "punishment" even though the client might be a high performer.

When providing sponsored coaching, coaches should be prepared to explain coaching succinctly, field questions the client has about coaching, and explain the process of coaching a bit more than normal for the first few sessions. The coach may ask what the client's experience and expectations are coming into the first coaching session and then tailor their explanation of coaching and the coaching process to the client's response. Also, the coach should be prepared to provide broad, open exploration for those sponsored clients who are ready for more in-depth coaching as well as more direct, tool/resource based coaching for those who need a bit of a bridge to be open to a true coaching experience.

Sponsor requiring confidential information

An additional challenge of sponsored coaching is navigating the expectations of the sponsor who might require some level of reporting on the client's progress, coaching topics or the client's level of engagement. Coach allows for more rapport and trust when the sponsor does not require reporting or allows reporting to be done at the aggregate level rather than on an individual level. When serving in a contract that might require additional reporting, a coach should still hold to their ethical boundaries effectively:

- A sponsor should clarify what needs to be reported before the contract begins
- The client, coach and sponsor should all be in alignment on what is expected to be reported, who will report and when the reporting will happen.
- If the sponsor were to change the reporting expectations the coach will need to hold the original boundaries based on a clear original contract.
- The coach may need to close a contract where the sponsor uses reporting in a way that was not originally agreed upon (e.g. determines hiring or promotion decisions based on how many hours of coaching a client receives without first having articulated this expectation)

Ultimately, sponsors, coaches and their clients should be crystal clear on reporting expectations before the coaching begins. Without this clarity the client may not trust the coach and the coach could even find themselves in an HR dispute or even a lawsuit.

Practicing Establishing the Coaching Agreement

Practicing asking powerful questions, offering meaningful observations, and demonstrating effective, active listening all require a client and a live session. However, practicing the way a coach establishes a coaching agreement can and should be done before ever seeing a first client.

Coaches should consider the elements above and their own personal "scripting" of how to explain coaching, how to answer questions about coaching, and how they would prefer to set expectations between their clients and any potential stakeholders. Coaches should practice these personalized scripts aloud. Coaches can even consider recording these scripts a few times, listening to the recordings, and possibly sharing these practice recordings with a mentor coach.

Of course, anytime a coach creates a script of any sort, it is not meant to exclude the unique experience of each client they serve. A first session should not run on autopilot.

Coaching Agreements 2: Setting the Session Agreement

To reach a destination, a coach and client need to at least know the direction they are headed. Beyond a relationship agreement, each individual coaching session needs an agreement around what the client wants to accomplish and where they generally want to be by the end of a coaching session. This chapter explores the

Competency 3 Elements 6-10

The ICF recognizes that coaching requires a great deal of decision making in order to move a conversation from the beginning to the end. Ideally, the decisions of what to talk about and how to make progress are made in partnership with the client.

The following elements of competency 3 are more associated with the partnership a coach offers in an individual coaching session. Because some of these elements are directly reflected in the PCC markers of success, these parallel elements and markers will be explored together.

Element 3.6. Partners with the client to identify or reconfirm what they want to accomplish in the session

PCC Marker 3.1. Coach partners with the client to identify or reconfirm what the client wants to accomplish in this session.

This element/marker is one of the most straightforward requirements for success at any level for ICF credentialing. The coach simply needs to ask what the client would like to work on with the session. A coach can prompt this exploration with questions such as, “What’s on your mind today?” or “What are you bringing to the session today?” A coach could also begin a session with a simple, “How are you doing today?” and a client may respond to the question with an extended response reflecting on their past week as well as what they are hoping to work on during the coaching session. In this case, a coach should reflect back what they are hearing from the client to confirm the subject for the session.

However, a coach can miss this requirement by demonstrating diagnosis and prescription from the very beginning of the session. Instead of confirming the topic for the session, a coach may interpret a client's check in and move immediately to trying to fix the client's problems from the past week. Coaches should make sure to defer to the client when it comes to what the client would like to work on with their coaching session. If the coach has an idea of what this might be, the coach should offer what they believe is the topic for the session and openly hand their interpretation back to the client with an open question. For example: "It sounds like we could focus on your sudden need for a career transition plan. What are your thoughts?"

Element 3.7. Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish in the session

PCC Marker 3.4. Coach partners with the client to define what the client believes they need to address to achieve what they want to accomplish in this session.

The seventh element of Competency 7 encourages coaches to help a client articulate the most important parts of their chosen topic. This helps the coach avoid making too many decisions on behalf of the client for where to explore during the session. There are a few ways a coach can honor the intention of this element:

- The coach should prompt exploration around what might be the subtopics that should be discussed as part of the topic.
- Another way to consider the purpose of this element is that the coach is helping the client consider the obstacles that could get in the way of them achieving their goal for the coaching topic. These obstacles will need to be addressed as part of the coaching session.
- If the topic seems very broad or too much to cover in a single session, the coach should ask questions to help the client determine what part of this bigger topic should be covered with the present session.

- If there are a few parts of the topic the client would like to cover, the coach should help the client consider the order of these topics (which takes priority, what comes next, etc.).

Measuring Quality of Element 3.7/Marker 3.4

The examples below offer guidance on the quality of coaching questions that might help explore the client's agenda. Keep in mind the higher scoring questions are not meant to be copied as templates. Instead, coaches should recognize the elements of more impactful questions and offer natural, responsive questions that reflect their client's language. Two similar examples are provided at each level. Note that the client's language appears [in brackets].

1 out of 5 - Assumptive and Directive

- "If I were in your shoes I would break this down by considering your manager's perspective, your peer's thoughts and then your side of the story. Let's start with your manager's perspective. What do you think they believe about the situation?"
    - Here the coach determines the subtopics and order of exploration without openly inviting the client to partner with the coach around this suggestion. If the coach has an opinion on the order of exploration that seems relevant, the coach should offer "Perhaps we could break this down by considering your manager's perspective, your peer's thoughts and then your side of the story. This is just a way we could move forward today, what do you think would be best?" This would still be somewhat directive, but there is an open invitation for the client to edit or reject the suggestion.
- Another 1 out of 5 approach to marker 3.4 is to simply ask no questions about what needs to be addressed as part of exploring the topic. Here, the coach will generally make an interpretation on where to explore after the agenda is partially set based on their own intuition.

2 out of 5 Template Only

- What areas should we address as part of this topic?
- What obstacles could get in the way of us accomplishing the goal for the session today?
    - These questions are not incorrect, but they are incomplete. The coach should use some client language to help inform the contents of their questions. This way the coach avoids the sense that they are facilitating a process rather than serving a person.

<u>3 out of 5 Technical and Tactical Client Language Only</u>

- What areas should we address as part of [making this decision]?
- What obstacles could get in the way of you coming up with [a plan] today?
    - While these questions use some client language, the questions focus only on the technical language the client has shared up to this point, and do not demonstrate meaningful, empathetic listening.
    - There is also a stilted tone to the words used by the coach. “Areas we should address,” for instance, is not a common phrase and might feel like the coach is doing “work” on the client.

<u>4 out of 5: Meaningful and Responsive Client Language</u>

- What are some things we need to talk about to help with this [once in a lifetime decision]?
- What could get in the way of you [creating a ‘repair the ship’ plan] today?

<u>4.5-5 out of 5: Connective Client Language</u>

- You were courageous in asking those [impossible questions] last session. What are some [questions] we need to talk about to help with today’s [once in a lifetime decision]?
- You said [‘repair the ship’] and then [sighed heavily]. What kind of work is it going to take today to come up with a [repair plan] today?

- These questions demonstrate broader listening and more in-depth use of meaningful and connected client language.

<u>Element 3.8. Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement or individual session</u>

<u>PCC Marker 3.2. Coach partners with the client to define or reconfirm measure(s) of success for what the client wants to accomplish in this session.</u>

This element and marker can sometimes sound very similar to the question the coach may ask at the beginning of the session (Element and Marker 3.1).

- 3.1 - What do you want to talk about today?
- 3.2 - What do you want by the end of the session today?

Often, if the coach only uses the above, template-only questions, the client will respond with a look of confusion and re-share the response to the first question. However, when the coach adapts the question for marker 3.2, the meaning of this question becomes more clear: We are helping the client consider the measure of success for the session.

- 3.1 - What do you want to talk about today?
- 3.2 - As we talk about [the meeting on Friday], what do you need by the end of the session to feel [completely ready]?

Marker 3.2 helps the client and coach clarify the overall direction of the session. This is often called the Measurable Result or Outcome of the session because it is stated early as part of agenda setting and then measured from time to time with check in questions throughout the rest of the session. Ideally, at the end of the session a coach can ask a question such as:

- “At the beginning you wanted to have [3 key points] to feel [completely ready] for the [meeting on Friday]? You came up with 2 key points so far, how do you feel you did with our session today?”

Some agendas are naturally not measurable (e.g. when the client responds with, “I don’t know…maybe I just need to talk it through for a while.”). In these cases the coach should help the client openly explore the topic further, and the check in around 10-15 minutes later to see if the client has a better read on what they need by the end of the session:

- Now that we have [talked this decision out] for 15 minutes, what are you recognizing you need by the end of the session?

Helping the client determine the result (and ideally a measurable result) for the session is one of the most important elements of agenda setting. In my years of experience as an assessor, when the Result is missing and the session gets closer and closer to the end of the call time, the coach offers less silence, uses more words per question, asks more closed questions, offers more direction and pieces of advice, etc. all in an attempt to help the client resolve their agenda. The reason the coach feels this pressure is that they are not sure what the client needs by the end of the session. They do not know because they have not asked or they have not checked in on the original measurable result for an extended period of time. The longer a coach coaches without checking in on the client's measurable result, the more burden they will feel to solve the client's problems for them.

Three similar examples are provided at each level. Note that the client's language appears [in brackets].

1 out of 5: Prescriptive or Dismissive

- Do you need anything by the time we are done today?
- I am not sure if [a decision] is going to be helpful at this point. What would be a better way to measure success for this conversation?
- A [creativity] problem? It sounds like you will need a way to structure your work to make time for this, right?

2 out of 5: Template Only

- What do you want by the end of our session today?
- What could be a measure of success by the time we are done today?
- What do you want to accomplish by the end of our coaching session today?

    - These questions are not necessarily bad questions, but they demonstrate focus on the coach's work in completing the agreement over the client's work. A coach should use some language from the client to inform the creation of agenda setting questions.

<u>3 out of 5: Technical and Tactical Client Language</u>

- What do you want by the end of our session to help with this [decision]?
- How will you know we are getting somewhere with this [peer situation] by the time we are done today?
- When it comes to [preparing for Friday's meeting], what do you want to accomplish by the end of our coaching session today?
    - While these questions use client language, they focus on the surface level language from the client. Coaches should prompt exploration beneath the surface of the presenting agenda (Marker 3.3); from here, coaches should consider using the more meaningful language as part of asking the client how they would measure success by the end of the session.

<u>4 out of 5: Meaningful and Responsive Client Language</u>

- <u>Decision</u>: What do you want by the end of our session to help you with this [pivotal moment]?
- <u>Peer Situation</u>: By the time we are done today, how will you know you are prepared to [avoid stirring the pot] with your [peer]?
- <u>Preparing for Friday's Meeting</u>: You said you are an [8/10 with nerves] preparing for this [meeting]. Where do you want to be on that scale by the end of our conversation today? …What is a [6/10] in comparison to the [8/10]?
- <u>Note on Being Responsive</u>: A coach can offer a question similar to one of the examples above, but in a way that ignores the client's language up to this point. For instance, a client could have already shared what they believe an 8/10 means to them, but the coach asks for the client to respond to the "8/10" question above. In this way, the

question's quality would be significantly less because it isn't being responsive to the client.

4.5-5 out of 5: Connective Client Language

- Decision: What type of [big bang] are you after with this [pivotal moment] today?
    - In this case, the coach is referencing the shift near the end of the previous session which the client called a [big bang] moment of clarity. This demonstrates listening between sessions and connecting the session of today to the ongoing growth of the client.
- Peer Situation: By the time we are done today, how will you know you are prepared to not [stir the pot] with your [frenemy]?
    - Here the coach is using a word the client used to describe their peer (frenemy, which is a friend who can at times feel like an enemy). The coach couples the meaningful language of stirring the pot with this interesting word that describes their peer.
- Preparing for Friday's Meeting: What do you need by the end of the session to help you [walk the 8/10 plank] successfully?
    - Here the coach uses the 8/10 score of nervousness and the client's metaphor that the meeting on Friday is going to be "walking the plank." While the walking the plank phrase is a particularly negative framing, the coach plays with the framing from the perspective of "successfully."

Marker 3.3: Coach inquires about or explores what is important or meaningful to the client about what they want to accomplish in this session.

This PCC marker is not directly reflected in competency 3's elements, but it does reflect the expectations of agenda setting for PCC and MCC level performance. When the client initially shares their thoughts on the topic for the session, they tend to offer more of a surface or transactional topic. Coaches who ask a few questions about the significance of the agenda topic help the client dig under the surface and better understand the full nature of the topic at hand. Without exploring the significance of the agenda, the coaching can focus more on the “symptoms” of the problem instead of what can provide the client the most impactful change.

Without exploring what might be under the surface of a given agenda, the coach may provide more transactional coaching. Transactional coaching is the term given to sessions that help resolve some of the symptoms of the client’s agenda, but may miss out on helping the client to resolve the root of the agenda topic. When a coach helps explore the depths of the session topic, the client can have more opportunity to have a transformational session where they understand and resolve their challenge, problem or opportunity more fully. Transformational coaching also supports a client’s ability to consider how their progress with the current agenda topic can impact other areas of their lives and lead to their growth as a person.

Measuring Quality of Marker 3.3

Consider the types of questions offered below as examples and how they may lead to transactional or transformational session:

1 out of 5 - Overly Interpretive and Directive

- It sounds like you need to figure out what to do next. Is there a first step you can come up with?
    - This question offers the coach’s interpretation of what the client needs from the session without considering what has prevented the client seeing a way forward before the session. The instant movement towards resolution (action) indicates the coach’s intention of fixing the client’s problem rather than helping the client understand themselves and their problem more effectively.
- Wow, if my manager spoke to me that way I’d just want to punch him. Right?
    - There are many problems with this movement from the coach. First, the call to violence is a non-starter and should be

rejected as an unexplored statement. The coach could theoretically share the impact the client's session topic is having on them, but this coach is not framing this as an observation intended for deeper exploration and partnership. Instead of asking, "That is how I felt the moment you described it to me, how are you feeling as you share the situation with me right now?" the coach simply asks "Right?" indicating that the client should agree with the coach that punching the manager is an idea to consider. However, all of this leaves the client's experience on the table in order to focus on the coach's experience. It is better for the coach to simply ask about the client's experience and what they want going forward given the challenging situation.

- So you have a decision. What I want you to do next is consider this tool that will help you make decisions. Here's a visual I want you to look at as we begin.
    - This movement from the coach assumes the importance, approach and measurable result of the client without offering open exploration around markers 3.2-3.4. Because of this, the client's experience and what is under the surface of the agenda topic goes unexplored as the coach immediately directs the client towards the way the coach would prefer to resolve the agenda topic. Even if the coach were to offer a tool here, the coach should clarify how the tool could be of use and openly invite the client to consider if they would like to explore the topic this way or if another way would be better.

<u>2 out of 5 Template Only</u>

- What makes **this** important to talk about today?
- What's the significance of all of **this**?
- What's making **this** top of mind for you today?
    - These help explore under the surface of the client's agenda, but they are a clear miss in terms of demonstrating empathetic listening. Without using the client language, the client may not follow what the coach is referring to with the use of demonstrative pronouns (this, that, these, those). When

reflecting on our language as coaches, we should consider any demonstrative pronoun as a blank in the sentence that probably should be filled with the client language. The following examples will demonstrate the impact of simply replacing the This from the above examples with transactional and then transformational language from the client. (Client language in [brackets])

3 out of 5 Technical and Transactional Client Language Only

- What makes [Friday's meeting] important to talk about today?
- What's the significance of all of [these decisions you are facing]?
- What's making [your morning routine] top of mind for you today?
    - These questions demonstrate empathy and are also more clear because they use the client's language. However, these questions demonstrate a missed opportunity because they lack depth.

4 out of 5: Transformational and Responsive Client Language

- What makes [Friday's skirmish] important to talk about today?
    - Alternatively, the coach could ask, "What makes [Friday's Meeting a Skirmish]?"
- What is making [these decisions really challenging]?
- What's making [waking up with purpose] top of mind for you today?

4.5-5 out of 5: Connective Client Language

- How is [Friday's Skirmish] related to you becoming a [role-model leader]?
    - Here the coach is asking how the meeting on Friday (labeled by the client as a skirmish) is connected to a broader client goal of becoming the type of leader others can look up to. This connection draws out awareness of the situation as well as the client's developing sense of identity.
- When you said ["I have all of these challenging decisions"] you [closed your eyes] like this (coach reflects body language). What's under the surface with these [decisions]?

        - Here the coach is helping the client consider the connection between their agenda topic and their automatic behavior when discussing the topic. This behavior is based on automatic thinking and emotional reactions to the topic, which, when unpacked, can help lead the client to better understand the depth of the agenda topic far more than simply asking a template question of "What's the significance of all of this?"
    - You've had a [mountaintop year] based on our last conversation. How is [waking up with purpose] helping you go beyond the [mountaintop]?
        - Here the coach is helping the client reflect on the positive language from a previous goals check in conversation. Instead of contradicting the client by indicating that they have already been waking up with purpose, the coach helps the client consider waking up with purpose as a continuation of the progress they have made so far.

Exploring the Potential for Transformation within a "Mundane" Topic

I am often asked by coaches whether or not they should offer questions about the importance, significance, or the changes the client would like to see in life if the agenda topic is a truly mundane one–selecting a restaurant for dinner tonight, having a routine meeting with a manager, setting up some basic objectives for themselves based off of a well established, ongoing goal they have been pursuing consistently. My response is that a coach cannot conjure a transformational focus for every agenda, but coaches can expect that there is always more meaning under the surface that might support the client's exploration. We should at least offer questions of this sort before assuming there is nothing of value to uncover.

Almost every agenda, however small, will have a reason for showing up within a coaching session. For the client who wants to select a restaurant for a dinner tonight, the coach might offer, "What makes this decision significant enough for us to explore it over the next 40 minutes?" or, "What are you hoping will happen if we find the "right" restaurant by the end of the session?" For the agenda that seems straightforward, the coach should ask questions that sound authentic to the session using the client's language so it does not sound as if we are simply going through the motions of agenda setting.

<u>Element 3.9. Partners with the client to manage the time and focus of the session</u>

The coach's goal should not be to resolve the client's agenda by the end of the session knowing that the coach cannot provide the resolution themselves. Instead, the coach should support the client in using the time effectively to help the client get as much work done as they can during the session to help them with their agenda topic and result. After agenda setting, coaches do well to check in at least a couple of times on the client's desired direction and what the client would like to do with the remaining time in the session.

<u>Element 3.10. Continues coaching in the direction of the client's desired outcome unless the client indicates otherwise</u>

Once the coaching agenda is set, the coach should begin asking open, exploratory questions that help the client think about their situation, the challenges and obstacles related to the situation, who the client is and wants to be through their situation, etc. (See Chapter 3 - Evokes Awareness and Chapter 10 - Maintains Presence).

<u>START - A Structured Approach to Setting the Agreement</u>

If we were to name each marker of success for competency 3, we might label them this way:

- Marker 3.1 - <u>Subject or Topic</u>: What the client would like to talk about during the given session.
- Marker 3.2 - <u>Result and Measures of Success</u>: What result the client is hoping to accomplish with the given topic by the end of the session. How to measure the success of the exploration of the coaching session.
- Marker 3.3 - <u>Potential for Transformation</u>: What makes this topic significant. What is beneath the surface of this topic.
- Marker 3.4 - <u>Areas to Be Addressed</u>: Subtopics, obstacles that need to be explored, approach to the topic at hand.

These markers can be explored sequentially as organized by the ICF; however, there are some benefits to adjusting the default order of exploring these elements, particularly for coaches who are new to establishing a coaching agenda for a session. The START model below encourages a coach to help a client consider the depth of the agenda topic before anchoring on a measurable result for the session. This way, the client can consider what type of practical result would be closer to resolving the transformational as well as the transactional agenda.

To this end, I created the START model of agenda setting as an agenda setting structure to help newer coaches consistently explore the client's topic while focusing a bit more on the transformational agenda over the transactional. Below you will find the START model along with sample questions that can be adapted with client language to help explore each marker of competency 3.

S - Subject (Marker 3.1)

- How would you like us to get started today?
- Based on your learning from action…what would you like to focus on today?
- What is most important for us to focus on today?

T - Transformation or Top of Mind (Marker 3.3)

- What makes this the topic for us to work on today?
- What makes this important for us to spend time discussing?
- As we work on this, what difference do you want to see in your life?
- Who will you be able to be if you work on this topic?

A - Areas to Address or Approach (Marker 3.4)

- Wow, this is a big topic. What part is most important today?
- What will we need to chat about to work on this topic?
- What are some of the things we need to address to help you think and plan around this situation?

R - Result or Measurable Outcome (Marker 3.2)

- As we talk about _____, what would you like by the end of the session?
- What practical takeaway do you want from today's session?
- What type of takeaway do you want by the time we are done today?

T - Team Up (Element 3.10 and Marker 5.3 - Following the client's agenda and partnering with the client during the rest of the session)

- A coach may then offer, "How would you like us to get started on this topic then?"
- Focus on the client's objective for the session with open exploration from here

"Just Follow the Client"

Sometimes coaches push against following any form of structure or expectations for coaching such as the ICF's markers of success for agenda setting. While START is certainly not the only way coaches can observe these markers, observing the markers of success are very important to setting the stage for an effective coaching session.

When evaluating coach performance, coaches have shared that they don't want to restrict themselves with any expectations of agenda setting because they want to simply "follow the client." However, the difficulty here is that without an agenda in place, throughout the session the coach will have to make increasingly difficult guesses as to what areas should be explored (3.4), what meaningful questions should be asked (3.3.) and what type of resolution the client might like by the end of the session (3.2).

Simply "following the client" in this way often means the coach will follow the coach's own way of thinking about what questions might be helpful in the moment and how the coach might approach exploring the type of topic the client brought to the session. It is best for the coach to inform their questions and observations with the client's direction for the session. This way there can be an ongoing, supportive partnership between the coach and the client.

Openly Exploring Meaning, Measures and Milestones

Having a set structure like SMART goals and START agenda setting can be a helpful way for coaches to get started in the field. The START model provides a memorable path to follow so coaches make sure to thoroughly explore an agenda before the middle of the session exploration begins. Structure is reliable, but it is also constraining.

As coaches grow and get a sense of the markers of success with agenda setting, they can begin to feel the impact of exploring each marker (or element of START) and they experience the impact of not exploring these markers. Over time, coaches can discard the structure of START or similar models in favor of more open exploration around competency 3's markers of success. Instead of S-T-A-R-T, the questions a coach uses may explore T-A-R in a different order and with multiple questions. If a client brings a more surface level agenda, the coach might ask two or three T questions. If a client's initial response to the R is not very measurable, the coach may help the client consider T and A a bit more before checking to see if the R could be more measurable.

Starting the Session

When training new coaches, I am often asked how a coach should begin a session. There are a few different options: Checking in on how the client is doing (demonstrating care and empathy), asking how the client did with their actions steps from last session (facilitating client growth), immediately asking what the client would like to focus on (establishing agreements before deciding what to ask about), offering an initial preparation experience such as a taking time for meditation or breathing or simply asking "How should we get started today?".

All of these approaches have their merits, and the main thing a coach should remember is that they should generally get to agenda setting early enough to help the client articulate what they want from the coaching session. Therefore, a coach should be careful to keep an eye on the time for pre-agenda setting discussion encouraging the client to consider what their intention is for the session early enough to inform the rest of the discussion. Practically speaking, coaches should help the client explore their agenda within the first third of the session. There are certainly exceptions to this guidance, but the further a session goes without an agenda, the more the coach will be making decisions on the session direction without clear direction from the client.

Coaching the “I Don’t Knows”

When working with a client who is new to coaching, they may often respond to agenda setting questions with an “I don’t know” response. These “I don’t know’s” show up more often in sponsored coaching where someone has provided coaching services. This is very understandable because they may not feel comfortable yet with taking the responsibility of determining how to use the session time. Keep these

1. Give 5 second pause after an “I don’t know.” – Often clients say “I don’t know” out of habit when they feel they need more time to respond. In this way they may not mean “I don’t know” but rather “Let me think about that.” Therefore, coaches should initially respond with support and spaciousness (e.g. nodding and offering around 5 seconds of silence). This allows the client time to consider the question recognizing that the coach is comfortable with them taking their time.
2. Ask a question that narrows the scope - Taking more than 5 seconds for the first couple of times the “I don’t know” response shows up might only add to the hesitation from the client. After offering a bit of time, coaches should offer the question in a way that narrows the scope of the original question. For instance:
    - After asking, “What would you like to talk about today?” the coach may respond to an I don’t know with “What are some things that you would like to go well over the next couple of weeks?”
    - After asking, “What are you hoping to have by the end of the session today?” the coach could ask, “
3. Openly offer options - Help further narrow the question by offering options based on the client’s earlier language or options that seem related to the conversation so far.
    a. Based on the long-term goals from our first session, you mentioned you want to gain better exposure with your skip level this quarter while also taking care of your health with exercise. We could look at

either of those topics or any others that you have on your mind. What would you like to focus on today?
    b. Directors I have worked with in the past often focus on delegation, translating expectations from executives to their team members, reflecting on their identity as a director who doesn't do front line work anymore or other topics unique to this level. How do any of these sound to you as an area of focus?
    c. Note: With each example in steps 2 and 3 we are seeing the coach take on more work for the client. While this might be called for at times, this should not be seen as or presented as the normal approach to coaching. Coaching works best when the client offers their agenda topics and session direction themselves.
4. <u>Review the nature of the coaching relationship</u> - Once a coach has progressed to offering options, the next step is either to tell the client what the focus of the coaching session should be (which would put the coach in the driver's position of the relationship) or pausing the coaching in order to discuss the nature of coaching. Keep in mind that when a client pushes against the boundaries of coaching, the coach will need to have a conversation about what coaching is and isn't, what the coach is responsible for and what the client is responsible for, and what topics might be acceptable in a coaching space to make sure the coaching can continue.

How to Practice Establishing the Session Agenda

To practice agenda setting, consider writing S-T-A-R-T at the top of a document or sheet of paper when you take notes for a session. A coach could make a check next to each element for each question they ask and perhaps even write the Result in full to help keep track of what the client wants from the session. Coaches should see this exercise of literally "checking the boxes" as a "training wheels" exercise to help work towards making agenda setting more natural and organic over time.

Coaches can also work in a group coaching one another just through agendas each taking 10-15 minutes to explore what they would want to work on if they had a full 60 minutes for a regular coaching session. This simulated environment is good for practice and feedback. However, coaches tend to work well with one another, so it may be hard to simulate the “I don’t know” moments and other challenges that come when doing agenda setting with real clients.

The best way to build your agenda setting skills as a coach is to have coaching relationships where you can record the session and review the recording with a trusted, credentialed mentor coach. This mentor coach can provide feedback on your technical approach (“checking the boxes”) and on how you use client language to make agenda setting feel natural instead of scripted.