



Coach Approach Ministries Podcast

Episode 42: Set Your Clients Up to Win Even Before Your First Session

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[Intro Music]

Brian Miller: Welcome to the Coach Approach Ministries Podcast, where we help people find their way with God by training the best Christian coaches in the world. Our podcast today is sponsored by our certificate in leadership coaching. This is a nine-month, ICF approved, coach training program that will prepare you to coach those around you, to set goals, take action, and reach new levels of success. We have a cohort forming in July, so if you're interested, go to our website at www.coachapproachministries.org/coachnow. I'm Brian Miller, strategic director for Coach Approach Ministries, CAM for short, and I'm joined here today by Mr. Chad Hall, the president of Coach Approach Ministries. Welcome Chad.

Chad: Brian, how are you today?

Brian: I'm doing very, very well, and Chad, it's kind of exciting because as a listener, listening to this right this minute, they may not realize it, but they may have downloaded our ten thousandth download. We are now at 10,000. That just seems incredible. I don't even know how to think about 10,000 downloads of our podcast.

Chad: I'm kind of thinking, Brian, that the ten thousandth downloader is like the millionth customer in the supermarket, and balloons are going to drop, and they're going to get one of those big checks, so by the way, if you're listening to this, and you are the ten thousandth downloader, expect that to happen at any minute. If it's not, you missed it, but that's fine. It's going to happen for somebody.

Brian: So, if you're looking to see if you're the ten thousandth downloader, you cannot tell. We purposely designed it that way, and if somehow you do prove in court, you are the ten thousandth downloader, we are certainly offering you free podcasts for the rest of your life.

Chad: We will send Bill Copper to your house to drop balloons on your head and give you a big, worthless check.

Brian: We'll have Bill Copper read the transcript over the phone to you every week, just to get rid of our voices.

Chad: In Morgan Freeman's voice.

Transcribed by Alyssa Miller

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Brian: Well, that would be awesome.

Chad: Yeah, everyone's now hoping they are not the ten thousandth downloader.

Brian: Chad, the first podcast of each month, we do a challenge podcast. It's not just informational, we want to challenge our coaches out there, or any coach, to take some action, to improve their practice, to improve their competency, and this month of April, I'm really excited about it. It's set your client up to win before you have even one coaching session.

Chad: I love this challenge. You did a great job coming up with it, and where my mind goes, is when I hear you say a win, I think what's a win, and what's a loss? I'm kind of curious about what's a loss in a coaching relationship. We want to avoid losses and experience wins. What's a loss you've had recently? You go first, and then I'll go.

Brian: Sure. A simple loss is a client doesn't show up or they cancel last minute for various reasons. That can be at least disconcerting for the coach. It might be something to worry about, it might not.

Chad: Yeah, that's right. It could be a legitimate reason, but it could also indicate a level of disengagement. I think a lot of these losses that we might talk about are really indicators of disengagement, or indicators the person is not getting a lot from the coaching. So, I can think of one in the not too distant past for me. A client, we were talking every two weeks, then it became every three weeks, and then it stretched out to maybe two months. There was a disengagement. Sometimes clients need to take a break from coaching, that's cool, but when there's a contract that you're going to talk twice a month, and they're not really coming through on that. Something's going wrong when they're not going through for coaching. Some other losses I can think of, a client comes without a topic, comes unprepared in some reason, or in some way. I think that's a loss, or they don't take action on the thing they said they were going to do. Again, once in a while, that's okay, but if it's consistent, that's a problem.

Brian: The same topic keeps coming up, just not getting traction, trying to get motivation, and that topic comes up every session. Another loss, for me, would be lack of vulnerability on the client's part. What's an obstacle to your goal? What's a couple areas you're struggling with? I don't have any. Everything's great. Wow. I mean, I'm not trying to be a jerk, but that's not possible.

Chad: Perfection this side of heaven is rarely achieved.

Brian: It's a lack of vulnerability and truly, that's the coaches fault. At some level, the coach has to set that up. Clients, you were talking about clients not showing up, but even clients just not engaging in trying to set a new appointment and trying to figure out what that's all about, what that looks like. Not exercising their own creativity and resourcefulness and looking to me as the expert.

Chad: That's a big one.

Brian: Certainly a piece, and we were listening to some coaching the other day, and the coach had been a professor for a long time, so his identity was a great teacher, and that's something, as you think about setting this up for a win before you have a session with the client, is setting up that expectation of what it's going to look like.

Chad: I think a common thread through all of this, Brian, is the losses, they tend to be client behaviors, but I want to really hinge all of them to what you just said which is, at some level, it's the responsibility of the coach, so there's something the coach is either doing or not doing that's fostering the loss. That's why I'm excited about this podcast, because we're going to talk about, okay, what are we going to do to foster wins for the client? And early wins, even before the first session, what can we do? I think when we do these things, we're intentional about helping the client win, and we're setting up a long-term successful coaching relationship that clients are really going to value.

Brian: I know I've had first sessions where people are like, "I've been looking forward to this. I'm so excited about it," and then I've had people come in and look at me like, "You're not going to hurt me, right? How painful is this going to be?" So, we want to set that up. Even, we use the word win, loss, and some people don't like the term win, loss, like there's always going to be a loser if we win, but simply, all we mean is setting up for success, setting up the client to have the best sessions, and set up your practice to be a respected practice that if you go to them, you're going to get good results. So Chad, I think the way to think about that is there are things we can do outside of the sessions. You've done a great job thinking about this. You've been thinking about how we can even set the client up to win during the sales process. We don't even have an agreement with the client, but we're already building an expectation of what it's going to look like in the session, so they're getting a sense of that, even from the very beginning.

Chad: One of the principles of organizational change, or development, or anything like that, there's this idea of going upstream, so if there's a problem where you are now in the flow of things, you just keep going upstream until you find where's the problem originating from? One of the things I've learned is upstream in a coaching relationship isn't the first session. It's not even the contracting phase. You need to go all the way into the sales process. We're definitely not even coaching at this point, but the first time somebody hears about you, or the first time they hear about coaching, or first become curious, you are already doing some things that are going to create a win for the client down the road, or downstream. Do not mix metaphors. So, during that sales process, you want to do things like be really accurate in how you describe coaching. You're not trying to just get a client. You're trying to get a coaching client, so being really accurate in how you describe coaching.

You can begin to educate the client during the sales process, even helping them decide is coaching of them, or not, how are they going to make the most of it, what's the ROI going to be for them, in terms of the results they can expect, and the investment. That's one of the places I see a lot of people struggle during the sales process is they actually want to downplay the investment that the client is going to make, and I don't mean the financial investment. I mean the time, and the energy, and the resourcefulness investment. They make it sound like, "Hire me as a coach. Pay me my monthly fee, and all your dreams will come true. You'll reach all your goals," and you forgot one little component, which is the client has to work really hard. So, if you're not describing that in the sales process in any kind of your website, or any kind of conversations that you have, you're really misleading the client, and you're setting them up to lose instead of win because they've got to come in knowing this is going to require work of me as a client.

Brian: Yeah, and certainly in the sales process, not only do we communicate accurately, that's something I think we are even... Because a lot of coaches don't like the idea of marketing themselves or

selling themselves. Something we can do in the sales process, that we're trained to do is create awareness for the client. So, we can create awareness of where coaching might be needed in their organization. We can create awareness of what kind of commitment they're going to need to make in order to move forward, even in a coaching relationship.

We don't always have to tell them. That's an awareness that can be created by a small assessment that we provide, not a big assessment like a guide, but a ten-question assessment that can give them a sense of that. That was really an aha. I recently had a coach we trained telling me about a successful coaching session that he had had, and he was coaching someone in coaching ministries, trying to get volunteers, and the big aha for the children's minister was that, "I've been trying to make it as easy as possible for them to get on my team, and actually, it's a huge investment, and I need to talk about that up front, about the sacrifice and the reward that goes with it." So, that awareness that came to her, and we can do the same thing for our potential clients, create some awareness of what they're going to have to do to achieve what they're going to have to achieve.

Chad: That's right. All we're going to do, as the coach, is help facilitate their new thinking and new activity. We're not doing anything for them, certainly, so that means they've got to do a lot of thinking. They've got to do a lot of work to achieve their goals. One of the other ways I try to do this, Brian, is I always say, of course, "What is it that's going on for you right now that you're thinking of hiring a coach?" I try to create awareness for the potential client during the sales process of what's the goal or the driving force that's leading them to even consider coaching, and so, by connecting coaching to this thing that's really an outcome for them, we have raised the importance level of whatever that is. If they do decide to move forward with coaching, they're coming in with an answer to the question why. Why coaching? Because I want to improve my family, or I want to be more successful as a leader, or I want to write that book, or whatever it is. Again, people don't buy coaching, they buy the results of coaching. So, during that sales process, if you help them discover the why, and you connect it to the hard work it's going to take from them to achieve it, I think you've really served them well during that stage.

Brian: I'm thinking of one, still a potential client for me, looking for a transition, trying to think through what that's going to look like. I got hired by an organization. They just got through one change process, and they want to keep a sense of urgency in front of them as they have to continue to change, and they've hired me to do that. I can think of another organization where I'm having some difficulty getting some of their leaders on track for coaching. There is no overarching feel to the organization. Some people feel coaching is valuable enough, everyone ought to have it, but it's not been communicated clearly to everybody else. If we're not ready to move into that, there's certainly a level of sales process, and there's a next level of prepping clients before you even have a session.

Chad: Yeah. And I think kind of the transition point is when you go from sales to more of that intake process, when you help them identify what they really want and why they would hire a coach, "I'm hiring a coach for X, Y, or Z," well, first of all, I would say, you've helped them to find a win. That is a win that you've identified the win. Once they've connected the win, W-I-N, to hiring you as the coach, now you're into the intake process, and intake, it's contracting. By the way, good contracting will set you up for a good win, but I think you've also got in mind, Brian, some resources, and forms, and some things, so tell us a little bit about what you do during that early intake before that first session. They're in, they want to hire you, or maybe they already have hired you, what do you do with them?

Brian: Well, the first thing I just recently did, I was hired by a seminary to coach their management team forward, and if you know anything about seminaries, and again, I'm not an expert... I went to seminary. You went to seminary. It doesn't make us an expert, but what I do know about education in general is it's changing quickly. Everything's changing, and so, even the idea of being an expert is very difficult, these folks are on the front lines. So, something I did, and I'm really glad I did it, and I'm going to start doing this, and I'm even having some aha's, I hope people have aha's as they're listening to our podcast. "You know what I ought to do now." As I was saying, I've got another organization where I've done a lot of coaching for them, I need to set something up.

What I did with this seminary, is I set up an online meeting through Zoom, GoToMeeting, Skype, whatever, and I talked to the whole group, as a group, and I explained to them, and we did this in a recent podcast, what we would do with people, I used that information, and I'll try to remember to put a link to that podcast on this podcast. I talked to them really quickly about what coaching is, what a definition looks like, who's the expert in a situation, and I even shared a story about people I know, no one knows anything else but them, and there's a spectrum. We want to find out where you're at, but we want to make sure you know you're the expert. The third thing I did was talk about where awareness comes from and gave some examples of I could tell you something. I use the "no one washes a rental car." In that meeting, of seven people, Chad, two of them had washed rental cars.

Chad: What are the odds, Brian? That's why they work at a seminary. No, I shouldn't say that. I work at a seminary.

Brian: So, first of all, we're going to coach them out of that mindset, but anyway, I spent a little bit of time, just an hour, talking with them, giving some examples, and in that, I purposely tried to engage them, to give them opportunities to speak into it, for them to create awareness. It was interesting, just thinking about this, Chad, as I did it, it could be the dynamic of being online, they're all in one room, I'm online, it could be the dynamic of the group itself, but as I asked questions and waited for their feedback, there was some deathly silence, and inside of me was like, "Oh no." I think there's that tension right off the bat that reminds me, okay, they're not necessarily used to this idea of engaging in and creating awareness, especially with outside folks. So, I demonstrated that, even in the first session, giving them times of silence, waiting for them to come back and speak. I think that in itself gave it a pretty good on-ramp for coaching with them.

Chad: Yeah, and I think, Brian, the reason a lot of us fail to do that and don't set our clients up to win is we suffer from, what some people have termed, the curse of knowledge. So, we know how coaching works, and we forget that not everybody else does know how coaching works, and so, even when we're describing to them how coaching works, we probably don't simplify it enough. We don't put it at a level where they can really engage, and fully understand, and therefore, on-ramp into the coaching effectively. It reminds me of, I've been going to physical therapy for my elbow, and they called to schedule for a cortisone shot, or something, and all the lady said was she gave me the date and she said, "And you'll need a driver." The sort of pushy person that I am, I said, "Come again? What do you mean I need a driver?" She said, "Well, you know, it's going to cause some numbness in your extremities, and it may make operating a vehicle a bit dangerous." Of course, I'm thinking, before she explained it, I'm thinking what are you doing to me? Are you putting me under, or what? So, she suffered from the curse of knowledge. She thought all I needed to know was that I needed a driver, and what I wanted to know

was why? Help me enter into this more effectively. For us, as coaches, we've got to, basically, dumb it down. We've got to help people know what coaching is, how it works, how they need to show up in order to be coached effectively, and we can't assume that they know how to do that even though we know how to do it, and we can put some resources and things together to help, so we don't have to have lengthy conversations with every new client, but we need to educate them. We need to prepare them, and that is a real service to them.

Brian: Well, it's a service to us too. As we were talking about that, I had two clients this week who loved it, and they got so much awareness, and action steps, and confidence, and clarity, and mindset. I was like, this is exactly why I got into coaching, and then you'll have sessions with others that you're like, yeah, I was hoping you'd walk away with a little more energy than you did, and how do I help? What can I do to create some things. So, going on further in this pre-session. I just made a change, Chad, and this is going to go into the next part too, which is even between sessions, but I'm going to mix those a little bit, but previously, I used Gmail, and Gmail, you can use canned messages. I think you have to turn it on in the labs, or whatever, which for some people, that may have technically taken you out of the equation that you have to turn it on in the settings, or whatever, because I turned it on for my wife, and I thought it was automatically in there. You've got to turn it on.

Anyway, there's this canned message, so I can just say, "Send folks this message." What I did was, it puts in the subject header, "Set up a coaching appointment with me," and in the body it says, "Here's the link to set up a coaching appointment." Well, I upgraded that tremendously, especially as I was going into this new organization, so I could set them up right off the bat. First of all, it says you need to set up a coaching appointment with me in the header, but then in the body, I took a little bit of time to say how much I appreciate being in a coaching relationship with them. Again, I think that's establishing trust and building that sense of confidentiality. I didn't write much, like two sentences. I didn't write a paragraph. I don't want them to see that and have to stop reading, and then I have the link, set up an appointment with me, and then I put a couple other resources in there that I thought would probably be really helpful. One is, we have a blog post, and I'll try to put a link to this in our show notes as well that says how to pick out a great coaching topic ahead of time.

I put a link to what we call a prep form, which is just like four questions, and I'll try to put a link to the prep form. I put it in my Dropbox, and I just put the link to the Dropbox prep form in there. I put a link to a standard agreement I have, and even though it may not be their agreement, they can read through and kind of get a sense of what's going on if they have some concerns or questions. I put a link to a video, about a 10-minute video, of you coaching me, just a sample video, so they can see what coaching is, and I don't expect them to look at all those, every time they make... They might only look at the one thing, but it might spark in them, even if they don't click on anything, it may spark in them, "Oh yeah, this is some of the stuff coaching's about."

Chad: What's neat about that, Brian, is how you hit various learning styles, various levels of depth that people want to go to. Some people are just going to want to click and watch a video for 5 or 10 minutes, and oh yeah, but all of that's kind of onboarding them to this whole concept of coaching because, let's face it, coaching's kind of weird. Like nobody just naturally knows what coaching is, or how to do it, or how to be coached, so you're really kind of bringing them into this new world of coaching, and those are great resources to do that.

Brian: Thanks. I appreciate that. What else would you add, Chad? We just have a few minutes left. What would you add to kind of finalize this idea of getting a win?

Chad: I would say, and I'm going to stretch beyond before the first session. Let's go a little bit into the coaching relationship. After the first, second, and third sessions, you need to request honest and immediate feedback, and you need to give it, and the giving it is probably the biggest challenge. So, giving it is saying, "You need to come prepared," or "You need to be ready to work hard," or, "Don't be nervous when I ask a question and you don't have an immediate response. You need to think, and take your time, and dig." Those kinds of things where the coach can give feedback to the client, but what I've learned is if you don't do that in the first, and second, and third, you are not going to do it in the fourth. You will have already established bad patterns. Why didn't you tell me this sooner? But you've got a little bit of a honeymoon phase up front, so take advantage of it, and again, ask for feedback. What can I do to be a more effective coach? What worked? Those kinds of things.

By the way, when you ask for feedback, you tend to have to be really pushy because people are going to say, "I liked it. It was good," and whatever. You've got to really push them to say, no, what can be better? You're really challenging them to be creative, but then I think a prep form between every session, having that available as a resource. I think staying in contact with people. We totally don't want to harass them or anything, but if you've got them on your mind, and you see an article, you see a blog post, you see a resource, that you send it to them between coaching sessions. I think that really sets up continued trust and relationship and sets them up for a lot of wins.

Brian: Well, you sparked something in me already. I've got a canned email to send if you need to set up a new appointment, but I'm going to set up another canned email that says, "You've got an appointment coming up, and here's maybe some of the similar resources," but maybe I even update, "Here's a blog post or a podcast that struck me as really interesting, and you might find it so. I don't think I have to customize that for everyone. It would be great, but just thinking about time constraints, I could just put in there something that was striking to me and helpful. I love that, Chad. You struck something in me already.

Chad: Brian, I do it personally because for each person...

Brian: Just go to their house. Knock on the door.

Chad: You're a little more like Mr. Roboto. That's okay. Everybody's got their style. No, you're great at creating systems. I'm great at doing things as they pop into my head.

Brian: I disagree. I actually think it's the other way around because I don't know that I'm great at making systems, but this idea that... Oh shoot. Where was I going to go with that, Chad? I lost it, but keeping them informed, keeping the connection with them, puts it on the radar for them.

Chad: The biggest thing, I think, with those resources that you might share in between sessions. I think the resource should be helpful. I think the most helpful thing is that they realize, "My coach thinks about me even when we're not in a session," and I think what that does for the client, not only does it build trust, it also says, "My journey is important." So, they're going to be more intentional about taking the actions. They're going to be more intentional about coming prepared. They're going to take themselves more seriously, and really, that's the key to an effective coaching conversation. Your client knows how

to be coached, and they know how to take themselves seriously, so they make the investment in themselves.

Brian: You make me think of another system, and I think we make a good combination. I think we've got to have some overarching thoughts, and then maybe some specific examples, but I could create a group of all, I have a lot of clients right now, I could create a Gmail group, and then just simply blind carbon copy everybody with something I've been thinking about that might be helpful to them. You don't want to overdo that unless you're just Seth Godin, but very few of us should send anything more than once a week. Maybe once or twice a month.

Chad: I agree.

Brian: Hey Chad, this has been great. I want to thank the listeners so much for joining us, and that's just been great for us. We've really enjoyed that people are really enjoying our podcast. If you could take a moment, if you've enjoyed this podcast, it's a little bit of trouble, I'll be honest, I wish it wasn't so difficult, and go to iTunes if that's what platform you're on, or whatever platform, we're on a couple platforms now, and give us a review. They don't even let the reviews show up until there's so many reviews. We would so appreciate it. If you've gotten anything out of our podcast, as your bonus of being possibly the ten thousandth downloader, go in and leave us a review. We'd really appreciate it. This podcast was sponsored by our certificate in Christian leadership coaching. It's a nine month, ICF approved, coach training program that will prepare you to coach those around you, to set goals, take action, reach new levels of success. We have a cohort forming in July, and if you're interested, go to our website at www.coachapproachministries.org/coachnow. We'll see you next week.

[Outro Music]