PCA's Coaching Jump Start Toolkit:
Contents Overview and Outlines

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PCA’s Introduction to Your Coaching Jump Start

Introduction
Before the first coaching session, you may ask your client to complete a self-assessment and business overview so that you know how to help them.

- Goals. Goals need to be clearly defined.
- Challenges. They should identify the challenges they're dealing with now.
- Strengths and Weaknesses. They should identify what's going well and where their business is lacking.
- How to Move Forward. Ask them to come up with their own ideas about what should be done and help them refine.
- Learning Style. They should tell you how they prefer to learn.
- Questions. If they have any urgent questions or concerns, these should be included.
- Business Overview. Ask them to give you details on their business.

Conclusion
Ask your client to fill out the self-assessment worksheet and business overview and submit it to you before your first coaching session.

Preparing for the First Coaching Session

Introduction
You should be fully prepared for your first coaching session with a client so that you don't waste time gathering basic information.

- Information You Need from Clients

Gather and organize all of the information you need and review it before the first session.

- Expectations for the Sessions

Discuss the sessions' content with the client and outline realistic expectations.

- Anticipate Questions

Try to anticipate questions they may ask and prepare answers.

- Getting into the Zone

Mentally prepare yourself so that you're positive, enthusiastic and ready to talk.

Conclusion
Make a plan for wrapping up each session so that it's smooth and doesn't go over on time.

The Anatomy of The First Coaching Session

Introduction
The goal of your first coaching session is to take in information about your client so you can better serve them.

- Free Consultation or First Session

Decide beforehand whether you'll offer a free initial consultation or take in this information during the first actual session. The free consultation can actually be part of your sales process. Make sure the client understands this process.

- Self-Assessment Worksheet

During this initial consultation, go through the client's self-assessment worksheet with them.

- Responsibilities and Expectations

Clearly outline the responsibilities and expectations of both the client and the coach.

- Measuring Progress

Establish a way to measure progress so the client can see how far they've come.

- Session Details

Nail down specifics about the sessions such as length, frequency, etc.

Conclusion
None of this should be set in stone as sometimes circumstances change.

How to Run an Effective Coaching Session

Introduction
Your coaching sessions should be as effective and focused as possible in order to help the client reach their goals.

● Create an Agenda
Create an agenda for each session. This is a schedule template that gives the session structure. If you're stuck for ideas, it's helpful to take a coaching session with someone else.

● Greeting and Opening
Start each session by breaking the ice and getting into the comfort zone, but keep this short.

● Review of Progress
Review the progress your client has made so far and identify what's working and what's not.

● Questions and Challenges
Go over any questions the client has or specific challenges they're currently facing.

● Feedback
Give your client feedback and suggestions on how to overcome obstacles.

● Next Steps and Agreed Actions
Use your feedback to agree on action steps to take.

Conclusion
In a coaching situation, you're not telling the client what to do but working together toward a common goal.

How to Do a SWOT Analysis

Introduction
A SWOT analysis is a tool that helps you decide which direction to take in solving problems or reaching a goal.

- Strengths

Your strengths are natural abilities or things that are currently going well for you.

- Weaknesses

Weaknesses are areas where there needs to be improvement.

- Opportunities

Opportunities are external factors that the client can take advantage of.

- Threats

Threats are external obstacles or challenges that may give the competitor and advantage.

Conclusion
Once these things are identified, they're compared against the goals the client hopes to achieve. Through this analysis, you can create a plan for overcoming obstacles and making best use of strengths.

Root Cause Analysis – Asking Why

Introduction
Root cause analysis is a process of asking 'why' several times until it leads you to the ultimate cause of a problem.

- Getting to the Bottom of It

Start by identifying a problem or challenge. Through a series of 'why' questions and 'because' answers, work your way backwards to the source. Once this source is revealed, obvious answers will present themselves.

- Many Different Approaches

The solution may not be to remove the root cause but to make a different change somewhere along the way.

- Visual Representation

Diagramming this process and presenting it visually helps you and your client to better understand the cause and effect.

Conclusion
Root cause analysis is an easy method anyone can learn and it benefits your client greatly if you teach them how to do it.

The Power of High Impact Questions

Introduction
High impact questions lead the client to think about an issue more deeply.

- The Elements of a High Impact Question

High impact questions are simple and direct. They encourage creative thinking and self-reflection.

- Which One Do You Choose?

One example of a high impact question is to ask a client to prioritize. For example, which one problem do they need to tackle right now? This forces them to choose only one and keeps them from being overwhelmed by possibilities.

- Picture Yourself…

High impact questions take things out of the abstract realm and plant them in the here and now. This produces answers that naturally lead to taking action.

Conclusion
Listen closely to the answers to these questions and guide your client toward the best action to take.

Tips on Helping Clients Set Priorities and Create Action Plans

Introduction
As a coach, you need to help clients set priorities and create workable action plans.

- The Biggest First

Ask your clients to identify the one project that would have the greatest impact on their business and life.

- Breaking it up

Break large goals up into smaller milestones and action steps that will help you work toward them.

- Work Backward

Put tasks into chronological order so that those which need to be done before others are done first.

- Timing Is Everything

Create a timeline for each milestone and place the action steps within the timeline with deadlines.

Conclusion
Major goals shouldn't change, but nothing else is set in stone. Allow for changes as necessary.

Tips for Taking Action – How You Can Help Your Coaching Clients Succeed

Introduction
Your coaching sessions should define the right actions for your client to take and motivate the client to take them.

- Client-Generated Steps

Ask the client to generate the steps that need to be taken because this increases the likelihood that they will.

- Verbalize It

Use language that makes the step official and ask the client to do the same. Put it in writing as well.

- Little Reminders

You may choose to send your client email reminders to keep them motivated.

- Getting Stuck

Create a plan for dealing with problems and missed deadlines.

- Encouraging but Firm

Be strict because you want them to attain their goals.

- Reward and Acknowledge

Give the client plenty of praise for all of their little successes.

Conclusion
Avoid equivocal language such as 'should' or 'ought to' and replace it with more decisive language such as 'will.'

Keep the Progress Coming – How to Continue Your Client's Progress after Coaching Sessions End

Introduction
Once your sessions are over, your client still has work to do and you should create a plan that helps them continue growing.

- A Long-Term Action Plan

Create a long-term action plan for your client and walk them through it at your last session.

- Be Your Own Coach

Teach them the skills you've used to coach them so they can be their own coach.

- Establishing Accountability

Set the client up with an accountability partner to keep them on track when you're no longer there for them.

- A Space for Your Clients

Create Facebook groups, forums or membership sites where former clients can support each other.

Conclusion
At the end of your sessions, review the entire process with the client.