THE "4 STEP" LIFE COACHING PROCESS

The "4 Step" life coaching process involves setting some time aside in your regular schedule to focus on key areas of your life with another person.

In reviewing the process, I'll refer to two specific roles:

The "client" – the person *receiving* coaching.

The "coach" – the person *facilitating*.

It's important to understand both roles, especially if you are interested in exchanging life coaching with someone.

Preparation

Whether it's a phone call, a one-on-one session, or a group, there are a few steps necessary to optimize your environment in order to get the most out of this process.

1. *Establish specific beginning and end times* *prior* *to the session*. Be sure there is a clear understanding between you and your coach as to this time-frame, before getting started.

2. *Ensure your environment is free from distractions (*turn off your cell phone, the TV, etc.). Inform others not to interrupt you during the time frame of the session. If you are using a computer to read notes from, close your email program, web browser, or anything else that may distract you.

2. *Be prepared to take good notes*. Both the person acting as coach, and the client, should be prepared to take notes (pen and paper, laptop computer, etc.).

3. *Map out the session*. Before each session, the client should review their notes, goals list, and write out their intentions. What are you most wanting support on? Make

note of what specific items require focused attention – especially anything that feels overwhelming or confusing.

You may also want to create a simple list of your wins and challenges since the last session (to be discussed in detail a bit later).

Session Length

If you plan to do a coaching session once a week, *one hour* is typically enough time to go through the entire process. If it's once every two weeks, or once a month, then allot at least *an hour and half*. From my experience, these time durations work well for most people. If it's your very first session, set aside an hour and a half.

The "4 Steps"

The four main sections to the life coaching process are as follows:

1. Review
2. Check-In
3. Brainstorming
4. Scheduling

1. Review

This first section consists of reviewing:

- Goals (short-term and long-term)
- The needs-actions list (to be discussed later)
- Any ongoing reminders compiled from previous sessions.

The "Review" section sets the stage for the entire session. By reviewing your goals first, *before* addressing any challenges that may be occurring in your life, it addresses one major need – *perspective*. It's far too easy to “get lost in the trees” and not see the forest.

Reviewing your goals *in the beginning of the session* offers you a broader perspective on your life. From this vantage point, effective plans can be made that *not only* address current challenges, but allow you to be proactive in taking steps to meet your goals. This particularly addresses a common hunter-type challenge with mid-to-long-term planning.

Once you've created a goals list, it's essential you actually look at it occasionally. This may seem obvious, but many people (as I've done in the past) just store it somewhere, never to be seen again. It felt good to write it out, but nothing ever happened with it. And, even if you *do* have your goals posted up somewhere in your house – many times it just becomes part of the scenery.

Through *actively* reviewing your goals on a regular basis with someone else, you remind yourself about your dreams and intentions – those items you really want to accomplish.

Here's what this section of the coaching process looks like:

> Either you or your coach (decide which works best for you) reads through your short-term and long-term goals list.
>
> As you listen to each item, make note of which ones “jump out.”
>
> For example, if one of your long-term goals is:
>
> > *“Move to New York and study acting.”*
>
> And, as the goals list is read, that one really connects with you, let your coach know. Have them write all these items down so that they can be covered in the “Brainstorming” section later in the session.

How to Work with Your Goals List

A tendency many people have, when going through a list of their life goals, is to feel frustrated or overwhelmed because they tell themselves, "I *should* have gotten that done! I didn't work on that *at all* last week. I'm so lazy!"

If viewed in this context, your goals list becomes just a big weight, a reminder of all the things you think are wrong with you.

A much more productive method of working with them involves seeing them as *suggestions* – as *potential* items to pursue. There will always be goals on your list that you won't be currently addressing – especially if your goals list is quite large.

Use your goals list to spark you – to get you *inspired* to take action. Going back to the previous example:

"Move to New York and study acting."

Instead of hearing, "this is just another thing I have to work on." Connect with the feeling, "I'd *love* to do that! I really want to focus some time on this today during the session."

And, as you read through goals that *don't* spark you, just let them go. If they're connected to something that will benefit you, they'll come alive again at some point. Leave them on the list, knowing you'll revisit them in the next session.

Another common experience is, you hear a goal being read, and it brings up some sadness. Occasionally, it may even cut pretty deep. You may feel disappointed about your previous attempts to meet this goal that didn't quite work out.

It's *equally important* to note these items as well. Place them on the "brainstorm" list, so you can discuss them later in the session. Perhaps it's simply a matter of coming up with slightly different actions, or perhaps the goal itself needs to be reframed in some way.

Working with goals in this way keeps you connected to your life force. Over time, I've watched this practice really shift how people perceive their goals, creating an overall feeling of lightness around them. You're more likely to pursue your goals when they don't feel like obligations.

The Needs-Actions List

The "needs-actions list" is an essential component of the life coaching process. As discussed in the "Navigating Emotions" chapter, needs are like vitamins. When a need goes unmet for any length of time, the results can be depression, anxiety, and even health issues. This list is designed to help you maintain balance, no matter what's happening. It provides a clear method of scheduling activities that address core needs, thereby reducing times of overwhelm and emotional instability.

However, the primary reason for using this list on a regular basis is – *life can become much more fulfilling*. You now have a tool that helps you home in on those activities that most nourish you, and ensure they actually end up on your schedule. Through reviewing this list during every life coaching session, you exponentially increase the power of it.

Start by re-reading the "needs-actions list" section of the "Navigating Emotions" chapter. Create at least a short list to work from. It will continually expand and grow over time, so don't be too concerned about making it "just right."

However, you could also start the coaching process *without* a list in place. There is time set aside in each session to address the needs-actions list. With the support of your coach, you can start from scratch, talk it through, and build it over the course of a few sessions.

Here's how the needs-actions gets used in this segment of the coaching session:

1. Start by looking over the needs list on page 123. Scan through it, or have your coach read it to you aloud.

2. Make note of which needs “jump out” as being either *not* being met, or *definitely* being met. Then, tell your coach so they can write them down. This is not a conceptual process. Trust your gut-level response.

For example, if you read through the list and the need “respect” really jumps out at you, make note of this. Don't try to figure out *why* this need isn't met, just identify it.

3. Once you have your list of met and unmet needs, look over your needs-actions list (if you have one). See which actions you've already identified that can address the unmet needs. Identify which actions can go on your schedule, then have your coach write them down. Their job is to add them to the “Scheduling” section of their notes, to be reviewed at the end of the session.

If you *haven't yet* identified potential actions to meet a particular need, have your coach add this need to their “Brainstorming” section notes. Later in the session, you can spend some time addressing ways to get this need met.

For the needs that *have* been well met recently, let your coach know what *specific* activities met these needs. These then can be added to your needs-actions list.

For example, if your needs for “friendship” and “connection” were really met since last session, perhaps the activities that met them were:

Spent two days with an old friend
while they were in town.

On your needs-actions list, you may then want to write:

Needs:

Friendship and Connection.

Actions:

Schedule lunch with a friend.

Schedule a phone call with a friend.

Avoid associating a particular person with getting a need met. It can create a situation where you associate *this one person* as being absolutely necessary to meet this need. Although it's common for many of us to do this, it's a good habit to break.

4. Once you're complete with this process, see if there are any *other* actions you would like to add to this list. You may want to experiment with a few new activities. Again, this is an ever-evolving document. It's important to continually refine it over time, as you shift and grow.

2. Check-In

The second main section of the coaching process involves the client sharing both their *wins,* and their *challenges,* since the last session. As you'll discover, just about everything in your life can fit within these two categories. This section is specifically designed to meet needs like: perspective, clarity, listening, understanding, celebration, and empathy – to name just a few.

For most of us, there are very few times in life when we receive active listening – to share what's going on in our life without being continually interrupted. For us hunter-types in particular, this part of the coaching process can be immensely supportive because it allows us to gain clarity on all the details that have been banking around in our brain – going through them, one by one, so they can be addressed.

For this section to really be effective, the process should be free-flowing and engaged. Even if the "client" has prepared a list before hand, they should be encouraged to connect with what they've written. Through keeping this process "alive," it often spontaneously yields solutions to address specific challenges. This "processing out loud" can be extremely helpful for us hunter-types.

Wins

A "win" is any perceived accomplishment since last session. Wins can be anything from real-world accomplishments, emotional wins, to personal revelations. They don't *necessarily* have to relate to items on your goals list, but they're often connected in some way. Perhaps you'll only see the connection as you go through this process.

This first reason for listing your "wins" is to identify what *is* going well in your life. So many of us get completely fixated on reaching our goals, or dealing with challenges, that we forget to celebrate all the smaller wins along the way. Regularly celebrating "wins" often provide us the fuel we need to meet bigger challenges.

Another reason for noting your wins involves *tracking*. You'll want to track the effectiveness of your life coaching sessions – noting which actions, planned in previous sessions, are *actually* working for you. In this way, this section feeds your needs-actions list, because you're spending time identifying *what works*.

This is where the life coaching process can have a *cumulative* effect. As you get into the habit of being mindful of your "wins," there's a good possibility you'll start doing this on a daily basis. You'll start becoming more aware of what actions are working, and you'll train yourself to celebrate every win *in the moment*. This definitely has a positive psychological effect, and can improve your overall mood.

If you're the coach:

Your job is to make note of *all* wins shared by the client – either on your computer, or on paper. Using a computer is often preferable because you'll have the ability to email the notes to the client after the session. Keeping an ongoing record of your coaching sessions is essential for tracking purposes. Even if the person has a prepared list of wins, undoubtedly more will occur to them in the midst of the process.

In order to stay fully engaged, avoid the temptation to interrupt, unless you're needing clarity on a particular item. Your role is to listen and take notes. Specifically, make note of anything that should be discussed in the "Brainstorming" or "Scheduling" sections.

Perhaps, as the client goes through their list of wins, they'll say something like, "I *really* enjoyed working on that project. I'd like to revisit it again at some point in the near future." Make a note and add it to either the "Brainstorming" or "Scheduling" section, so they can follow up on it later in the session.

Sometimes a client will have a particular challenge that's really clouding their ability to list any wins. If this is the case, you may suggest *starting* with "challenges" then go back to wins afterward.

Another option is to make the request, "how about we make note of this point, then address it in *challenges*, once you're complete with listing your wins?" Be sure to phrase this in the form of a question, so the client has the space to decide what would work best for them.

If they're unable to list more than two or three wins, ask them what they're grateful for in their life right now. Do your best to draw it out of them.

Questions you may want to ask:

> Do you have any wins regarding items on your goals list?
>
> What did you do since last session that felt rewarding?
>
> Do you have any wins in relation to diet or exercise?
>
> Did you receive clarity on something that's been on your mind?
>
> Any wins from work?

At the end of the "wins" segment, you may also want to ask, "is there anything from your list of wins you want to add to the *Brainstorming* or *Scheduling* sections?" Share what you've written – see if there was anything you missed.

Challenges

This next segment of the "Check-in" involves identifying all those items that are causing the client discomfort. A "challenge" is anything going on in their life that is unpleasant, taxing, or confusing. If it's a problem, it's a "challenge."

Oftentimes, this is the "unburdening" part of the session. Here again, simply through the act of being listened to while sharing their problems, *without* being interrupted by someone trying to diagnose or fix the problem, can be immensely therapeutic in and of itself. Often, just this quality of listening is all that is required to diffuse or resolve a particular issue. People spend lots of money going to a therapist merely to receive this kind of listening.

Typically, once you share a problem with someone else, the weight of it no longer feels like it's all on your shoulders. The psychological benefits to this can not be emphasized enough. Many people experience extreme emotional suffering due to feeling they have no one to turn to for help. Scheduling this kind of support into your regular routine can drastically reduce feelings of alienation and separateness.

For the client:

It can be helpful to establish what you feel comfortable sharing *prior* to your session. If you haven't reached a certain level of trust with the person you're working with yet, you may want to avoid sharing more personal challenges until this kind of trust is established.

For the coach:

As with the “wins” section, the coach's job is to quietly listen, *without* interrupting, unless there's a strong need for clarity on a particular point. Specifically, make note of those items that should be added to the “Brainstorming” section. If it's an unresolved issue, put it on the list. Don't worry about whether or not it's “important,” just add it. You'll be going through the list with the client a bit later, to prioritize.

This is *not* the time to resolve the challenges being mentioned. However, there may be a *strong* tendency to do this. It can often be difficult to listen to another's pain without offering a “solution” to their problem right away. This definitely requires some self-discipline, and it takes practice. Simply listen and make notes.

This also helps create a strong container for sharing in future sessions. If the person feels *fully* listened to, it can build their sense of trust in you, and for the process. As mentioned, oftentimes the solution to a particular issue may come to a person *after* they've been fully listened to.

After the client has shared their challenges, depending on the severity of the issues mentioned, you may want to offer some empathy, saying something like, “it sounds like you've had quite a difficult week.” Or, you can simply ask them, “how do you feel now that you've shared all of that?” But, don't force it. If it's not authentic, just allow for silence and move on to the next section.

Carry-over Items – Reviewing Notes from Last Session

At the end of the previous coaching session, a list of actions and scheduled items was arrived at. This is the time to review all the items that may not have appeared in the "wins" or "challenges" check-in. It's important to do this later in the session because the client is usually a bit more present. They'll be better able to hear any items that *didn't* get done without as much self-judgment.

For example, in the previous session, the client may have set the following action item:

> * Contact three people to get testimonials for my consulting business.

The coach can review the notes from last session and ask how that went. Perhaps, in relation to the above example, the client *did* contact a number of people to get testimonials from, but only heard back from one of them. This should probably be added as a "Brainstorming" item.

Some people want to dive deep into to all the reasons *why* something didn't happen, and work out ways to improve their ability to be effective in the future. Others may feel so much self-judgment about not getting something done that it becomes counter-productive to go into this process of self-examination. It's very easy to have an incomplete action item turn into negative self-talk – which is the *exact opposite* of what is intended for this life coaching process.

Also, there is a *big* tendency for many people, especially early on in the coaching process, to create *way more* action items than are *easily* doable. By not pushing too hard during this segment, the unnecessary items will shake out – while the essentials will naturally float to the top.

That being said, I have one *big* rule of thumb to address items that stay on the list for more than three sessions:

Schedule it with another person!

This works extremely well for mundane and overwhelming tasks. Again, smarter not harder.

Avoid spending too much time on this segment. It should take, at most, five minutes – ideally, just a minute or two.

The "Check-in" Process – For the Client

Is it essential for the client to prepare a wins/challenges list *before* the coaching session?

It's preferable to get into the habit of doing this, but it's not essential. Especially if you've been facing some difficulties, the ability to do this may not be with you in the moment. Most of the time, you know full well what your wins and challenges are. Most people, once they get going, usually find it quite easy to rattle off a number of them without being prompted.

Even if you *have* made a list, it's typical to remember a few more once you get going. Once they've unburdened themselves a bit listing challenges, it's quite common for the client to remember a few other wins.

3. Brainstorming and Problem Solving

By this point during the session you should have a full list of "Brainstorming" items, derived from the earler sections. These will consist of potential action items, goals for the upcoming week, intentions, and usually quite a few challenges that need to be worked out.

Before diving into the list, it's important for the coach and the client to read through the list together and prioritize. Combining items that are in some way connected is also important.

For example, the coach may have assembled a list that looks something like this:

> *Schedule more physical exercise this week.*
>
> *Schedule time in nature.*
>
> *Work out what to do about the Margaret situation.*
>
> *Get clear on what actions to take in marketing my services.*
>
> *Pay parking ticket.*
>
> *Finish taxes.*
>
> *Unmet needs: connection, rest, play.*

From this list, the client may conclude that the "Margaret situation" is really bothering them, making this the first item in the list. They may also feel *strongly* about getting more clients for their business, so item #4 should be moved to the #2 slot. And so on...

Even though there may be a *number* of urgent items that require addressing, it's a good practice to ensure there are *always* a couple of items related to the client's goals list on the brainstorming agenda.

There's no right or wrong way to brainstorm. It's just a matter of going back and forth, one item anat a time, discussing potential strategies. Once clear actions have been identified – the coach's task is to write these out, placing them in the "Scheduling" section notes, to be reviewed at the end of the session.

Problem Solving

Much of the "Brainstorming" section involves problem solving – developing strategies to effectively address issues that are weighing the client down.

For the coach:

Your job, first and foremost, is to *ask good questions*. Assume the person, somewhere deep down, already knows the best actions to take regarding this particular item. However, feel free to offer suggestions. This is definitely an *interactive* process. Assist the client in gaining a wider perspective on the problem. And, most importantly, help them to get clear on their *intended outcome*. What's the "best case scenario?" If you can arrive at this, it becomes much easier to work backwards from this place of clarity to a potential solution.

4. Scheduling

The "Scheduling" section distills all the insights from the session into *clear action items*, placing many of them on the client's schedule. Throughout the session, the coach will have compiled a list of action items, starting with the "Review" section. These may be:

- Actions involving goals
- Actions addressing the "needs-actions" list
- Items mentioned in the "Check-in" section (wins, challenges, carry-over items)
- Items arrived at during the "Brainstorming" section (the majority of action items usually come from here)

For the coach:

Review the notes taken from the entire session. Ensure you have a complete list. Then read the list to the client. Ask them:

> Which items are the greatest priority?
>
> Which items should be placed on their schedule?
>
> Which items should be scheduled with someone else to ensure they'll get done.

The most effective way of ensuring an action item will be accomplished is to put it on your schedule. Having an action items list is essential. However, placing an action item on your schedule greatly increases the likelihood of it getting done.

Unless the client has already shown they are quite good with working from an action items list, encourage them to place numerous items onto their calendar (planner, laptop, or possibly their smart phone). If they are using calendar software, suggest they create a reminder for themselves for each item (email, mobile alert, etc.). This is especially important if this is one of the client's first sessions. See the “Time Management” chapter for more information on creating “reminders.”

Closing the Session

Once scheduling is complete, the session is just about complete. Two items should be discussed prior to ending the session:

- Establishing a time and place for the next session.
- Reviewing how the session went. What worked, and what could be improved upon next time?

1. *Establishing a time and place for the next session*

Setting a time for the next session *greatly* increases the likelihood there will be a next session. People get busy, forget, and fail to carve out enough time, and sessions endlessly get postponed. Again, this life coaching process has a cumulative effect, and works best when done on a regular basis (weekly, bi-monthly, etc.).

2. *Reviewing how the session went.*

As with any process, you always want to know what works and what doesn't. Taking a little time at the end of the session to identify what still needs to be refined can be immensely helpful in making the *next* session flow even more smoothly.

For the coach:

Here are a few questions to ask the client:

> What was most helpful?
>
> What was most challenging?
>
> What can be done differently next time to make the session more useful and satisfying?

Write all these down in your "coaching notes," so they'll be seen at the beginning of the next session.

For the client:

Going through this process also gives the coach clear feedback on how they were able to benefit you. This is immensely important. If the person coaching you *doesn't* feel they've been of value to you, especially if they're not receiving coaching in return, they'll probably be less willing to do another session with you.

However, contributing meaningfully to another person is a deeply rewarding experience. If you're the client, keep this in mind – be sure to clearly express your gratitude. Even if the session didn't go well, there will have been at least *a few things* that were helpful.

A Few More Notes for the "Coach"

If you're taking the role of coach, do your best to be transparent. Meaning, if you are feeling confused about how to handle a particular issue – or are unclear about what a client may be needing in a particular moment – share this. It keeps the process alive, and the tensions low. If you can go into a situation knowing it's OK not to have it all together, the more likely you'll be able to offer meaningful support.

Also, be sure to share your notes with the client after the session. Both people should have a copy of the coaching notes. This is why taking notes on a laptop (or even a tablet) is ideal. They can easily be emailed to the client at the end of the session.

I recommend using *just one* text file for all your session notes, adding in the date before starting each new session.

Typing out the name of each section at the beginning of the session can be helpful. It gives you a clear structure to enter your notes into. It will look something like this:

10-1-14

- Review
    - Goals
    - Needs-actions
- Check-in
    - Wins
    - Challenges
    - Carry-over items
- Brainstorming
- Scheduling

THE "4 STEP" LIFE COACHING PROCESS

1. REVIEW

- Read through the client's goals list
  Short-term goals
  Long-term goals
- Read through the "needs-actions" list.
- *Client* chooses whether to read, or have the coach read.
- During the reading, if an item resonates with the client, they inform the coach, and it gets placed on the "Brainstorming" list.
- Starting with the "Review" section provides a big picture context for the rest of the session. It may remind the client of what they most value, and perhaps allow them to see their current challenges in a different light.

2. CHECK-IN

- *Wins*

  Client shares all perceived accomplishments since last session.

  Wins can be real-world accomplishments, personal achievements, overcoming of obstacles, etc.
- *Challenges*

  Client shares all challenges since last session.
- Coach does not interrupt, unless needing clarity – or for offering time reminders.
- Coach makes note of all items shared during the "Check-in" that could possibly go onto the brainstorming list.
- At the end of the check-in, the coach reviews their notes from the previous session for items not mentioned.

3. BRAINSTORMING

- By this part of the session, a list of brainstorming items has been assembled from the previous sections.
- Together, the coach and the client *prioritize* the list – based on both urgency and the accomplishing of items on goals list (both are given equal importance).
- If the client has challenges that are keeping them from feeling centered in the moment, start with these items first. Typically, the goal-related items will be easier to work with once the emotional challenges have been cleared.
- The role of the coach is to *ask questions*, *brainstorm*, and assist the client in getting to *doable actions* for the upcoming week(s).
- Actions get placed on an "action items" list to be used in the "Scheduling" section.

4. SCHEDULING

- Action items are reviewed and (as many as possible) are placed on the client's schedule – at specific times (ex: Tuesday 10am, go running).
- Action item *reminders* are also created (smartphone/computer, email reminders, post-it notes).
- Actions that consistently go incomplete week-after-week get *scheduled with someone else* for added support.
- The client's schedule for the next few weeks is reviewed and refined. Is it balanced? Is it realistic (filled with doable action items)?
- Non-addressed or carry-over items to be reviewed next session are noted.
- Feedback for the coach is offered by the client. What was helpful and what could make the next session better?
- Next session is scheduled.

Some Final Notes on the Process

By this point, you should have at least a general understanding of how this process works. Although there are numerous details to consider, it's actually quite simple in practice, and can be easily memorized.

When first starting out, it can be helpful for the coach to read directly from the book. This makes the process a bit like following a recipe. Don't expect to get everything right the first time around. Assume they'll be lots of little potholes, and possibly a bit of awkwardness in the beginning. However, after doing a few sessions with the same person, the process will naturally become more streamlined.

In the beginning, it's helpful to follow the process as closely as possible. Then, once you have a clear grasp of how everything works, feel free to adjust things to best fit your needs.

If you're the one *receiving* coaching – the more you're clear about how the process works, the easier it will be to explain it to someone else, if you ever have to seek out a different person to be your coach.

Be Mindful When Choosing Your Life Coach

When selecting someone to be your life coach, whether it's a trained life coach, a friend, or a family member, there are a few points to consider. The right person for the job will leave you feeling inspired and clear at the end of a session. The wrong person may leave you feeling worse off than when you started.

My advice is – *try someone out first*. Don't make a long term commitment until you know they are able to support you effectively.

Also, ensure you're offering something in return for their time and energy. If you aren't trading coaching, and not paying them,