JAY SHETTY
CERTIFICATION
SCHOOL

CHAPTER 5

BUILDING A **COACH-CLIENT RELATIONSHIP** ON THE COACHING ROADMAP

PATHWAY TO LIFE COACHING PROGRAM

FOREWORD

I trust you have enjoyed it as much learning thus far as I have been humbled by being able to share my knowledge and experience!

Today, we'll be looking at the many aspects involved in building a super coach-client relationship. Inspiring relationships are the hallmark of all great coaches.

Then, we take a bird's eye view of the coaching process that gives you a general overview of the coaching roadmap that you can expect to follow.

THE COACH-CLIENT **RELATIONSHIP**

So, let's start by looking at what having a professional relationship means. First, I must tell you one thing I have learned early on. The best coaching outcome does not come from coaches with the best skills and knowledge, but from **coaches who can establish the best relationships with their clients**.

Does this surprise you? The notion amazed me at first, too. But the more I thought about it, the more I saw the logic. Most of all, deep down, people want to be accepted, respected, feel valued, right? None of the best techniques and methods can achieve that without a genuine connection between the coach and client.

A good relationship builds on many levels, including:

- Making the clients feel **secure**
- Increasing their **confidence**.
- Stimulating **motivation** and **commitment**.
- Making clients more willing to be flexible and **try new things**.
- Raising **retention** and **completion** rates.
- Encouraging clients to explore their **feelings** and **emotions**.
- Helping clients explore their **vulnerabilities**.

These qualities all have a strong correlation with positive change. A coach can have the best tools, techniques, and education, but without a connection with the client based on integrity and mutual respect, the deeper engagement needed to persuade and motivate is just not there.

I'm not saying that coaches do not have to have significant experience and expertise. Only that these qualities will be pretty meaningless if you can't convey it to your clients in a believable way and make them want to stay and invest the effort to follow your plans.

During your first contact with a new prospective client, you give information and explore a possible fit to reach a coaching agreement. This crucial first step in the relationship sets the tone for the future.

THE **PROFESSIONAL** RELATIONSHIP

#1 PRE-AGREEMENT AND INTAKE

So, even before I talk about the softer, human qualities of any healthy relationship, we need to cover the administrative and regulatory protocols when establishing a professional relationship. When someone first contacts you, you set up an initial meeting if the interest is in private, one-to-one coaching.

For online or group coaching the first discussion may also be in person but could be an email exchange, or video or phone call.

The goal remains the same, namely, to explore working together and has two key elements. These are seeing if the needs of the client are a good fit with what you offer as a coach and reaching an official coaching agreement.

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1 First of all, you discuss the **needs of the client** during the complimentary session or sales discussion. Whether it is a complaint that needs to be resolved, a distressing symptom that needs to be alleviated, or any improvement that the client seeks, you need to make sure of two things.

- The need(s) are sufficiently detailed and specific, and there is no misunderstanding between you and the client.
- The solution or outcome that the client desires is within the limits of your coaching abilities, skills, and knowledge and, if applicable, covered by your certification.

You can also make use of a pre-coaching questionnaire that asks more about the client's history, circumstances, challenges, and aspirations. Self-assessment tools like the **Wheel of Life**, which we look at in detail in the Jay Shetty Certification Program, also add detail to the process.

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2 When the client's needs are understood, and you confirm that you can assist, discussion of your **coaching fees** follows. The client agrees the amount, frequency, and method of payment. Your fee structure should be transparent, simple, and fair; then, no apologies or exceptions are necessary.

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3 Next, you give the client a written coaching agreement that contains all your **terms and conditions**, including the reason(s) or objective(s) the client has for seeking your services and your agreed fee arrangement.

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4 Together with the coaching agreement document, any information or promotional material about your practice and your credentials, experience, and methods, are included

in a **welcome packet**. You can also include information about assessments that you use and an overview of a typical program. Include only the most relevant material so that the client does not feel overwhelmed.

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5 The first coaching session (or **intake session**) should convey certain information to the client, including your methods, what they can expect from coaching and any rules or boundaries that you need to bring to their attention. The discussion clarifies how you will work together as a coach and client, including the commitments and style.

Although many coaches combine the pre-coaching exploratory conversation with the intake session, in my opinion, **this is not a good idea.** Let me explain why.

The intake session is crucial to building the foundation of the emerging coach-client relationship. It should be separate from an exploration of client fit and fees. As a coach, you need to allow enough time to manage expectations and explain the working dynamics, including what happens when a client arrives late, misses a meeting, is unprepared, falls behind their goals, or did not do their homework.

The first coaching session is the best opportunity to establish mutual trust and respect and make the client feel like an equal partner. From such a position, it is much more unlikely that the relationship will break down because of unmanaged expectations or

a lack of discipline.

Experts like **Laura Whitworth** and her colleagues refer to this stage as “designing the alliance.” Because it is such a critical one or two sessions, I urge coaches to use a checklist to make sure they do not miss anything important.

#2 THE WORKING RELATIONSHIP

When we have completed the information gathering, explanation, and administrative parts of the pre-agreement and intake sessions, the work starts! From here, it is vital to building on the established relationship.

It can be done by continuing to manage expectations – there should be as little surprises for the client as possible, display trust, demonstrate values, exhibit fairness, and treat the client with integrity, respect, and clear understanding.

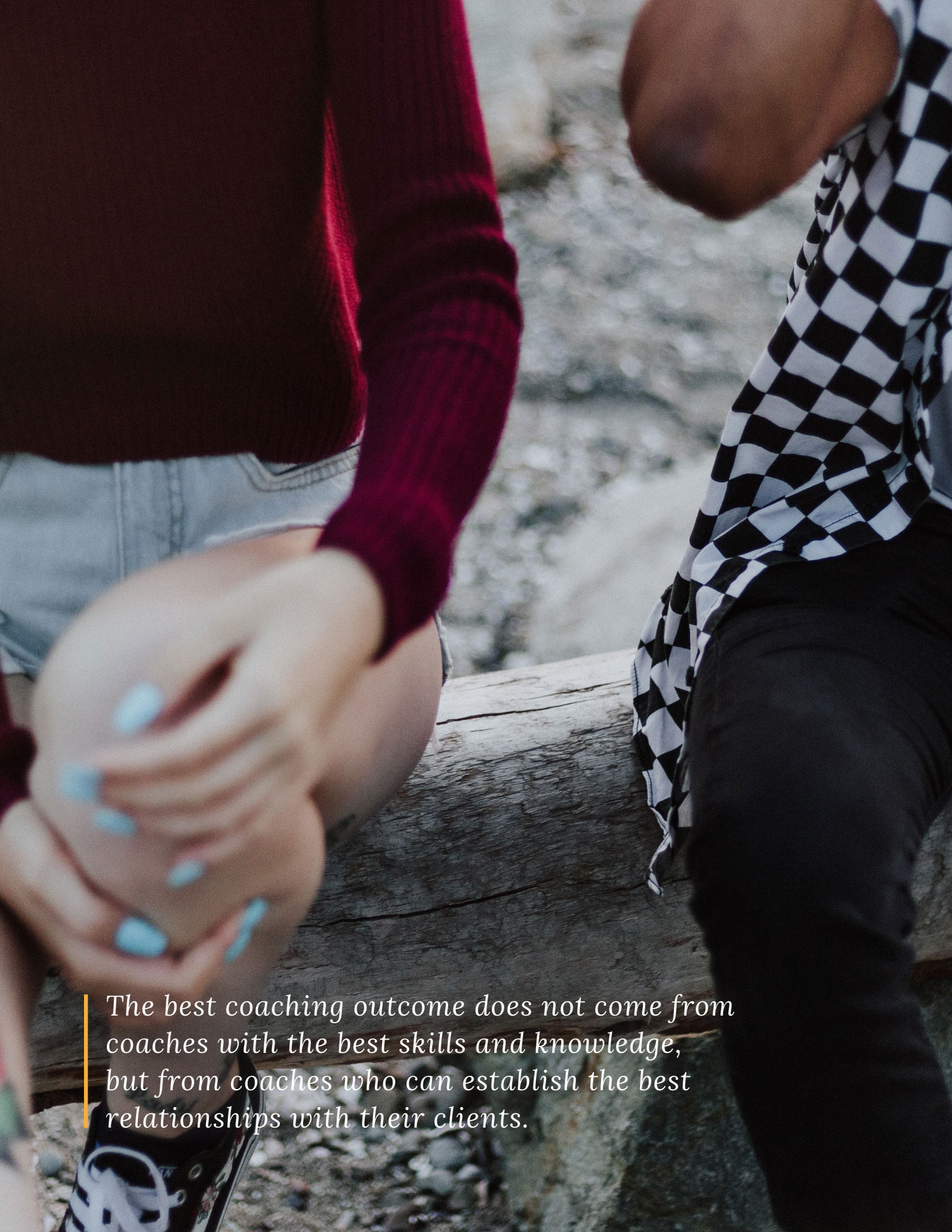
Two more qualities needed to build any relationship are openness and spaciousness. The connection allows room for the client to create and experiment while the coach is open but unattached to the client's choices and direction. **If this sounds a little laissez-faire or uncaring to you, let me explain.**

Being given autonomy is a sign of trust and respect in a relationship. It means your partner is confident that you will do the right thing and make the best decisions, or, at least, take responsibility and learn from any mistakes, which is an integral part of growth.

A good coach does the same thing. I have learned from tough experiences that clients must be guided rather than instructed, showed instead of ruled, and allowed the freedom to take what you have taught them and apply it in their way to their own lives. It is the only way that they will feel comfortable enough to continue working in the right direction.

It makes sense, doesn't it? They have to strengthen their wings and find their compass. You will not always be there to show them the best way. You may not still know the best direction for them to go in. After all, they are the experts in their experiences and lives.

Clients take your experience and skills and shape them into meaning and form with your mentorship that fits their needs. If you get this balance right, I promise you, your relationship with clients will last many years, and you will be as amazed at how they thrive as I was.



The best coaching outcome does not come from coaches with the best skills and knowledge, but from coaches who can establish the best relationships with their clients.

A **FRAMEWORK** FOR BUILDING A COACH-CLIENT RELATIONSHIP

I want to share with you a proven framework to use when building trust with a person or within a team. The **Reina Dimensions of Trust** conceptualize the Three Cs that are instrumental in developing trust. These are **Capability**, **Character**, and **Communication**.

In the context of coaching, demonstrating **Trust of Capability™** means…

- Acknowledging clients' skills and abilities,
- Allowing clients to make decisions,
- Involving clients and encouraging their input,
- Helping clients learn and develop skills.

With clients, **Trust of Character™** requires...

- Managing the expectations of clients,
- Establishing boundaries,
- Delegating initiative and responsibility,
- Ensuring mutually beneficial intentions,
- Sticking to agreements and promises,
- Being consistent.

The third dimension, **Trust of Communication™** expects coaches to be...

- Sharing information with clients,
- Telling the truth, being genuine and authentic,
- Admitting mistakes,
- Giving and allowing constructive feedback
- Ensuring privacy and confidentiality
- Communicating with a clear and ethical purpose.

As you can see from the Reina model, trust is built based on a two-way interaction that is not influenced by a power differential. It is open, spacious, and allows mistakes but expects accountability and responsibility. Above all, the model creates an awareness of trust among all participants, which is an essential parameter of thoughtful behavior and understanding.

Another hallmark of a trusting relationship is the skill to listen reflectively and with empathy.

HOW TO BECOME AN **EMPATHETIC LISTENER**

First of all, what exactly does empathic listening mean? Also often called reflective listening, it is a way of engaging with someone else that demonstrates a genuine interest in the person and what they have to say, a need to clarify and understand their message without misunderstandings or ambiguity, and trust and respect for that person.

As a result, the speaker is encouraged to open up, express their emotions, and share things that they wouldn't otherwise have done, because they feel safe and supported. You will agree that these are the reactions and feelings that any interviewer, therapist, counselor, or coach want to evoke.

So, how does empathic listening differ from essential listening?

First of all, the idea is to accompany the speaker in their moment of self-discovery, whether it is from a place of joy, sadness, grief, disappointment, pride, shame, guilt, or any other emotion. There is no give and take, only complete attention. There is no exchanging dialogue, but a reflection to ensure 100 percent clarity and understanding.

As an empathic listener, you:

- Let the client steer the conversation,
- Demonstrate with gestures and eye contact that you are fully attentive,

- Avoid any distractions,
- Don't interrupt,
- Ask open-ended questions only meant to invite more information,
- Do not judge, make conclusions, or offer solutions and advice,
- Rephrase and reflect to the client what they have said to clarify the meaning.
- Demonstrate empathy, don't offer sympathy.

In other words, you **Listen**, **Summarize**, and **Follow-up**, also known as the LSF technique of empathic listening by paying close attention to the client's words, body language, and emotive leakage to read between the line and reflect to confirm the meaning.

Emotional and other non-verbal leakage can be beneficial clues. It occurs when a client is not consciously aware of something or does not want to reveal it, but their body language or words inadvertently expose the truth.

The good news is that empathic listening is a skill that can be learned and improved with practice. As a coach, use any opportunity that you have to hone this technique, and I bet you'll be pleasantly surprised by the excellent results on the strength of your relationships.

A **BIRD'S EYE VIEW** OF THE COACHING PROCESS

Next, let's start by presenting and very briefly explaining how a typical coaching process looks like and the order that the coach takes clients through. Standard roadmaps have up to six steps, which we have condensed to three for the pathway program. However, the primary sequence and concepts remain similar.

As we move from discovery, through clarity, to action, the client becomes more aware and empowered, the coach-client relationship ideally strengthens, and the focus remains on sustaining motivation and commitment. These are essential parameters throughout the process that demand persistent attention.

I start with the recovery and preparation phase that aims to identify where the client is and where he or she wants to be.

COACHING **ROADMAP**

The following steps on the coaching roadmap are a bird's eye view or a general overview of the process and typical sequence of the different activities.

#1 **DISCOVERY** AND **PREPARATION** PHASE

1 **Establishing rapport and awareness.** Throughout the pre-agreement meeting, intake session, and the first few sessions after that, the coach is extra vigilant to build a strong relationship while always prompting the client to be aware of his or her reality, vision, strengths, weaknesses, and anything else that may affect their journey.

2 **Clarifying what the client wants.** The coach uses reflective listening and other tools such as the *Wheel of Life* to find out what the client's needs, problems, and dreams are, in other words, the reasons they sought life coaching.

3 **Assessing the reality of where they are right now.** The coach uses a similar process of inquiry and assessment to describe the client's current reality in all the areas of their life. The difference between their current state and desired outcome represents the gap that the coaching process has to bridge.

4 **Assessing priorities.** Clients commonly want to make progress in multiple areas of their lives, including career,

family, health, wealth, social, and living to a higher purpose. Making progress in one area usually result in positive carry-over effects elsewhere, which means that change is prioritized to the most crucial area first.

5 **Identifying barriers and risks.** To prevent the change process from derailing later on and keeping improvements on track, the client identifies any obstacles and risks that exist in their life that could or do stand in the way of achieving their desired outcome.

6 **Reviewing the available and required strengths and resources.** Similarly, the client lists strengths and resources that can support achieving their desired outcome, which can potentially help to offset the negative influence of the barriers and risks. Resources and powers that are required but not sufficiently available should be addressed in the development plan.

#2 **CLARITY** PHASE

1 **Defining the client's vision.** As an articulation of the client's desired end state without reserve or restraint, the vision is typically vague and ambitious. Nevertheless, it is a crucial blue-sky target for the client to hold onto and visualize. The vision is the starting point of creating a personal mission statement.

2 **Creating a mission statement.** The client's vision addresses their 'why' and 'what'. The mission statement follows on by answering the 'how' question. The declaration is brief but specific as it sets a direction and parameters toward achieving the vision. The mission statement is like the executive summary of the client's goals.

3 **Formulating goals.** Goal setting is the cornerstone of a personal improvement or change process. The client expresses one or more goals that are specific, measurable, attainable, relevant, and time-bound according to the SMART principles. These goals have a careful balance of importance and proximity so that motivation and commitment are maximized and sustained. As far as possible, goals should be broken down into shorter-term targets that lead to the same point, the client's vision.

4 **Brainstorming options.** It is essential that the client feels engaged and empowered in the coaching process. Therefore, the coach facilitates generating possible solutions in a brainstorming session with the client. At first, clients list all options that come to mind, not filtering those that seem far-reaching or flawed. In the second step, they examine the possibilities in terms of feasibility, risk, contribution, and the probability of a positive result. The client chooses only one or two options per goal.

5 **Identifying mastery targets.** The coach helps the client to identify the skills and knowledge needed to implement the selected solutions.

6 **Creating a development and action plan.** Together, the coach and client take the solutions and mastery targets and create an action plan. The plan is specific, detailed, broken down into the smallest steps, and has milestone dates leading to overall goal achievement within the desired timeframe.

7 **Cultivating motivation and commitment.** A critical skill for any coach; they apply reflective listening, show empathy, and use knowledge and expertise of the coaching process to motivate clients. A committed client stays engaged for longer, invests more effort in changing, and cooperates better, all of which co with a positive outcome.

#3 ACTION TO **COMPLETION** PHASE

1 **Setting the action plan in motion.** All plans are set. Now it is time to implement the solutions. In parallel, the client masters the skills needed, learns techniques to apply, and practices how to manage and sustain the changes they have set out to achieve.

2 **Facilitating momentum.** Using their relationship, their commitment, and motivational techniques, the coach encourages enthusiasm and passion for maintaining momentum toward a positive outcome.

3 **Monitoring, reviewing, and adjusting.** These are the actions that a coach continuously does to make sure that a client's plans stay on track and relevant. People and situations change,

therefore, plans have to be dynamic and adjustable too — monitoring and reviewing show the client where they are at any time. Progress motivates continued effort.

4 **Holding accountability for success.** The client must understand that he or she is accountable for their successes and failures. The coach is there to help and facilitate. Setbacks and failures are not the end of the road but learning opportunities for the client to reenergize their forward movement.

5 **Celebrating successes along the way.** An essential but often forgotten aspect, all progress must be recognized and celebrated. It makes a hard process more enjoyable, makes a faraway end goal seem closer, and helps improve the coach-client relationship.

6 **Preparing for continuous improvement and setbacks.** For any coach two things are certain: **1.** The client will leave you one day. **2.** They will experience setbacks along their journey. Neither is necessarily a bad thing. They will learn enough from you that they can continue growing on their own. And, setbacks present some of the best learning opportunities. A client prepared with the right techniques and methods is resilient and determined to bounce back stronger.

There you have it – my **19 points along three stages in the best coaching roadmap!** Follow it, and you will not let down clients.

So, now that I have shared with you the important pointers on when and how to build strong relationships with your clients, let's reflect on the information and practice.

NOTEPAD

Notes on ***Chapter 5:*** *Building a Coach-Client Relationship on the Coaching Roadmap*

REFLECTION POND

EXERCISE **1**

On Distractions and Engagement

As I am sure you can imagine, distractions are the enemy of engaging meaningfully with another person. A deep engagement requires undivided attention, empathic listening, and personal sharing.

Today's life, with mobile phones, Internet, FOMO (fear of missing out), and information overload, regularly invites distractions.

It is different for everyone, but awareness is critical as a first step to reversing the disruptive influence.

As part of this week's reflection, I ask that you think of **three to five distractions** that most commonly affect your relationships, task-focus, and other aspects of daily life. It can be anything, from worrying, addictions, trying to multitask, loud noises in your building at your office or home, the need to check social media or emails, or anything else that prevents you from paying full attention.

Write it down in your journal. What happens, when, and what are

REFLECTION POND

the consequences? Write down things you can do to minimize the occurrence or effect. Be specific and try it out next time.

Next, I ask that you practice reflective listening.

Date

Notes on Distractions

LIBRARY

Dimensions of Trust and Engagement

To know more about the *Reina Dimensions of Trust*, and the research and application of the technique, read the following report.

"Why Trust is Critical to Team Success" by the Center for Creative Leadership and Reina Consultancy (2017, CCL).

Because of the vital importance of mastering reflective listening as part of your conversation with clients to stimulate change, I would also like you to read the following optional book.

"Co-Active Coaching: The Proven Framework for Transformative Conversations at Work and in Life" (4th ed.) by Karen Kimsey-House, Henry Kimsey-House, Phillip Sandhal, and Laura Whitworth (2018, Nicholas Brealey).

So, now that you know more about how to build great coach-client relationships that will take your practice to the next level, we conclude our pathway program in the next chapter by looking at how to establish a successful life coaching business the Jay Shetty way.

Pathway Program External References

Kimsey-House, K., Kimsey-House, H., Sandhal, P., and Whitworth, L. (2018). *Co-active coaching: The proven framework for transformative conversations at work and in life* (4th ed.). London: Nicholas Brealy Publishing.

Reina, D. Reina, M., and Hudnut, D. (2017). *Why trust is critical to team success.* Center for Creative Leadership. Retrieved from ccl.org/articles/white-papers/trust-critical-team-success/

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