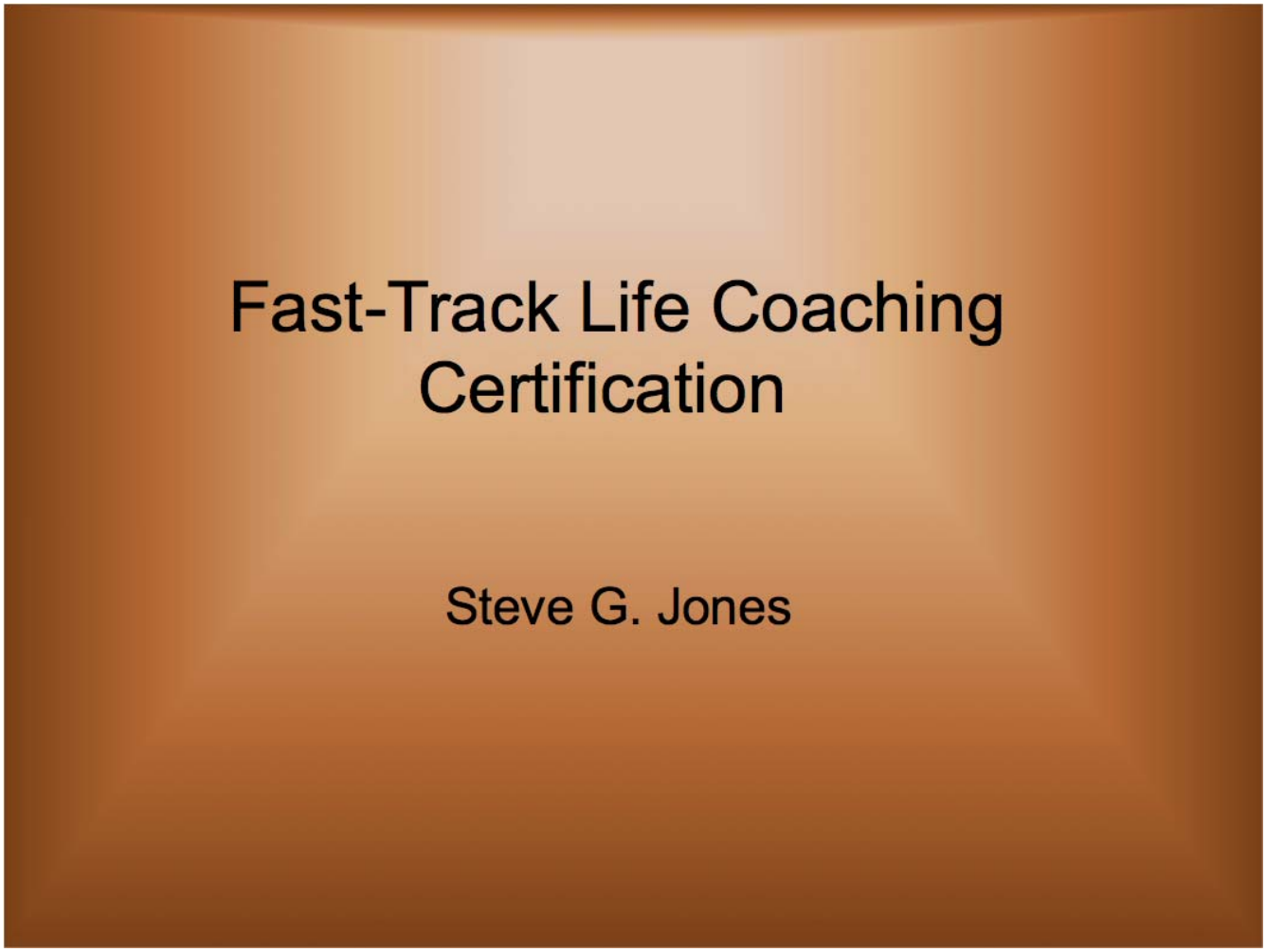
# Fast-Track Life Coaching Certification Manual




## www.LifeCoachingCertified.com

***By Steve G. Jones, M.Ed.*** ***© 2011***

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*Welcome to the Fast-Track Life Coaching Certification Course.* You have taken the first step into a fascinating world of helping people with the most advanced coaching technology available today. Watch the videos, make notes on each slide using this workbook, read this entire manual, and take the final exam at the link provided at the end of this manual.

*This manual and the videos do not necessarily follow each other exactly. I have made* every effort to present concepts differently in the manual than the way they are presented in the videos. Research shows this will enhance your learning experience. Additionally, there are some concepts covered in the videos that are not in the manual and vice versa.

All of the slides that are in the videos are in this manual. Please use this workbook to take notes on each module as you watch the videos.

I hope you enjoy learning as much as I enjoy teaching. If you have any questions as you go through the program, please e-mail me at Office@SteveGJones.com.



Steve G. Jones, M.Ed.
Life Coach

# What is Coaching?

Coaching is the process of assessing existing thoughts and emotions, observing behavioral and linguistic patterns, setting specific goals and discerning hidden saboteurs. Effective coaching should also be supportive of the client in making a plan of action and then to follow it to reach desired outcomes. It is also most effective when the Coach is able to create such a deep respect and rapport that the client feels comfortable, and most of all safe, to move from their former place to one of success.

You are being trained to listen to your clients' words, observe their actions, and to become aware of the way their client currently interprets the world around them. To be intelligent is to have fine distinctions about a topic or field. The finer the distinctions, the more wisdom or perception is available for both the Coach and the client to draw from. The Life Strategies Coach program will teach the coach these fine distinctions about human behavior. By identifying limiting strategic filters and beliefs through keen assessment of verbal and non-verbal patterns, you will elicit solutions and facilitate resolution of conflicts.

You will approach your clients with the understanding that there is a positive intention behind every behavior, and that there is no such thing as failure – there is only feedback. The ability to identify and interpret this feedback is just one of the many ways you will find what is blocking a person from their goals or desired outcomes. Together, you and the client create a feed-forward plan of action to achieve goals and to overcome challenges. Believing that people already have abundant resources within themselves, you will act as a detective to identify the strategies that are already successful in other contexts of a person‘s life and to tease out hidden saboteurs that may be keeping your client from achieving their goals. You can then guide your client in discovering how to apply their successful strategies as a way of overcoming their identified saboteurs. By sharing communication tools and strategies for success, this method of coaching builds a relationship with the client that shapes the client‘s ability to make better and finer distinctions leading to solid decisions and life choices more naturally and easily.

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# Module 1: Welcome to the Course

How Steve became interested in coaching

His commitment to education

Steve’s experience with having a life coach

Steve’s experience with coaching

Get excited about becoming a coach!

# Module 2: Basic Life Coaching: Preview

- What is life coaching?
- The value in life coaching
- How people benefit from life coaching
- Preparing yourself to be a coach
- Communication
- Creating value
- Coaching model
- Goals
- Confrontation

# Module 3: What is Life Coaching?

• Life Coaching is the act of empowerment

• The goal is to expand people's awareness through powerful and thought provoking questioning technologies

• Help them leverage their gifts and talents a lot faster than they could do alone

• As a life coach, you will develop the skill to unlock the power of others

• You will do this by motivating and asking the right questions

• Help promote self-awareness

# Module 4: How Life Coaching is Different from…

- Consulting

- Advice

- Mentoring

- Counseling

- Therapy

- Critiquing

- Guidance

# Module 5: The Value in Life Coaching: Business

• Entrepreneurial and Small Business Development

• Career Planning and Development

• Motivation and Time Management

• Creativity for Artists, Writers, Musicians and Performers

# The Value in Life Coaching: Personal

- Relationships and Intimacy

- Spirituality and Personal Growth

- Stress Management and Balance

- Motivation and Confidence

- Time Management

- Finances and Budgeting

- Health, Ageing, Lifestyle and Self-Care

- Family and Parenting

# Module 6: What Kind of People want Life Coaching

• Executives

• Business owners

• Small business owners who are self-employed

• Managers who want to improve their leadership skills

• People who want growth in their relationships

• People seeking balance

• People who want growth and change

# Module 7: Qualities in People who want Life Coaching

• Tactical thinkers

• People who desire a strategic and impartial mentor

• People who strive for improvement

• People who want more creativity in their life

• Open-minded and intelligent

•People who feel that there's more to life

# Module 8: How People Benefit from Life Coaching

• Knowing who you are

• Understanding your emotions

• Knowing what you want to accomplish

• Willingness to change

• Self-awareness

• Being in tune with the people around you

• Ability to set and reach goals

# Module 9: Preparing yourself for Coaching

• It’s all in the attitude: A positive one!

• Moral obligation

• Balancing talking and listening

• Putting the client first

# How to Develop Relationships with your Clients

• Have boundaries clearly set for yourself and for your clients

• Living by example

• Making sure your clients know where you stand

# Module 10: Communication

- The importance of communication

- Scheduling communication

- Types of communication
    - *Email*
    - *Phone*
    - *In-person*
    - *Skype*
    - *Instant messenger*

# Communication, cont’d

• Reading between the lines

• Knowing and understanding your clients’ needs

• Knowing what questions to ask

# Module 11: Intuition

• What is intuition? Thoughts and preferences that come to mind quickly and without much reflection

• In psychology, intuition can encompass the ability to know valid solutions to problems and decision making

# Intuition and Life Coaching

• How to develop intuition

• The more experience you gain, the more your intuition will pick up on

• How to use your intuition with clients

• When we use our intuition it may seem illogical, but it feels right

# Module 12: What Clients Will Look for from a Life Coach

• Certification

• References

• Rapport

# What Clients Expect from a Life Coach

- Connection/Communication

- Fulfillment/Satisfaction

- Direction/Influence

- Peace/Harmony

# Module 13: Creating Value: Your Personal Experience

• The importance of sharing your personal experience with your clients

• Challenges you have overcome

• Goals you have accomplished

• Being authentic

• Developing rapport

• Defining your focus

# Module 14: Creating Value: Knowing your Intentions

• What are Intentions?

• An anticipated outcome that is intended or that guides your planned actions

• How to communicate your intentions to your clients

# Coaching Model: The Big Picture

- Inner circle: Self-Awareness

- 2nd circle: Needs, Values and Beliefs

- 3rd circle: Exploring options and taking action

- 4th circle: Empowering questions

# Module 15: Coaching Model: First Consultation

• 30-60 minutes

• Free or small fee

• Explain terms and conditions

• Review pricing

• Discuss forms of communication

• Discuss static (set # of sessions/communication) or integrative plans

• Develop rapport

# Module 16: Coaching Model: Non-Directive Approach

• You, as a coach, do not impose your own solutions

• Support and guide clients to find the answers

• Discuss options, but never recommend one option

• Ask open questions

• Actively listen

# Module 17: Helping the Client Deal with Setbacks

• Change requires effort

• If something isn't working, reflect on why and take another approach

• Avoid actions that put goals at risk

• Emotions can throw you off course, but realizing this can get you back on track

• Expect the unexpected

• A “hole-in-one” is rare, it may take a few tries

• Keep an open mind and adjust to changes

# Module 18: Beliefs and the Law of Attraction

• Incorporate beliefs and the law of attraction into coaching

• Beliefs shape who you are and what you can accomplish

• Recognize limiting beliefs

• Change negative beliefs into positive beliefs

• Focus on what your needs are

• Allow it into your life

# Homework for Clients

• Make a list of 10 things that you have accomplished  (can pertain to a specific area of your life you are working on or life in general)

• For each item, make a list of skills that you used to reach the goal

# Module 19: VAK

• V—Visual
• Example: look, see, imagine

• A—Auditory
• Example: hear, ring, sounds good

• K—Kinesthetic
• Example: feel, touch

# Module 20: Knowing your Clients Representational System

• What is a representational system?

• How does this help with communication?

• Examples of words commonly used with each representational system

• How to discover someone's representational system

# Module 21: Visualization

• Most people respond well to visualizing goals and their future

• Help your clients visualize goals, challenges, and outcomes

• This helps prepare them for any situation

• Using vision boards

• Encourage clients to write down goals and other lists and remind them to frequently look at them

• Have them visualize their future in 1, 5, 10, and 20 years from now

# Module 22: Life Goals

• Have your clients think about life goals in the following areas:

• Health

• Career

• Growth

• Money

• Relationships

# Life Goals, cont’d

• Have your clients make 1, 5, 10, and 20 year goals in relation to each of the life goal areas

• Encourage them to write them down, keep them and frequently visualize accomplishing these goals

• This helps keep the big picture in perspective

# Module 23: Helping Clients Overcome Fears

- Fear of Failure

- Fear of Success

- Fear of Rejection

- Procrastination

# Confronting Challenges

- Frustration

- Hesitation

- Confusion

# Confronting Frustration

• When a client hits a “dead end” ask, “What can you do differently to get a new and better result?”

• Encourage them to think outside the box

# Module 24: Confronting Hesitation

Key Questions to ask:

• What is causing you to hesitate?

• What would help you to not hesitate?

• Encourage clients to deal with hesitations as they occur in a productive way instead of after the event has taken place

# Confronting Confusion

• Help your clients when they feel confused

• Encourage them to take a step back and determine what is causing the confusion

• Ask: What will you gain? What will you lose?

# Module 25: The Right Questions

Encourage clients to ask themselves questions with the following format:

1. Open-ended, broad questions that ask who, what, when, why, where, and how

2. Probing, gain more details

3. Clarifying, help to understand the response

4. Closed, often elicit a yes or no response and help reach a solution

# Homework

• Find a partner

• Have the partner write down a “secret” on a piece of paper. The secret can be anything, for example, it can say, “My favorite number is 11.” But you cannot know what the secret is.

• Ask your partner questions until you figure out what is written down.

• The more variety of questions you use of all 4 types of questions, the quicker you will find the answer.

# Module 26: The Wrong Questions

• Life coaching helps people become more aware of themselves and questions facilitate this

• Clients should never ask themselves questions that include the words always, never, and everything

• Example: “Why can I never do this correctly?”

• Encourage clients to use positive language

• Help them realize the benefits of changing negative self-talk to positive self-talk

# Module 27: Reflective Questions to Ask your Clients

• What stops you from taking action?

• What would accomplishing this goal mean for you?

• What will help you be most comfortable by taking this path?

• What do you like about the option you are considering?

• What tells you that this is what you would achieve?

• How will you know when you have reached your goal?

# Module 28: Energy Levels

• Tuning into your clients' energy levels can help you be more in tune with how they are feeling

• Listen to how they talk and use intuition and communication when necessary

• Use your energy level to inspire and encourage your clients

• Use positive language

• Encourage energy enhancing activities such as exercise and hobbies

# Module 29: Awareness

• Promoting self-awareness to your clients is very important

• Your clients are in the driver's seat, a life coach helps them figure out where they are going

• Awareness of life events will help people make better decisions

• Awareness helps determine what you are doing right, what needs fixing and how to grow

• Your clients need to learn how to give themselves good advice before taking advice from friends and family.

• Advice from others can throw them off track, especially in major life decisions

• The more self-aware someone is, the more they can predict outcomes

# Homework

• Have your clients make a list of their strengths and weaknesses

• Items can include skills and aspects of life (i.e. career)

• Some items can be a strength and a weakness

# Module 30: Fast-Track Life Coaching Review

• What is life coaching?

• Communication

• Creating value

• Coaching model

# Additional Information

- Thank you for choosing me as your coach

- Questions? Steve@SteveGJones.com

- Where to Learn more? www.LifeCoachingCertified.com

# What is a Coach?

--An effective coach creates a relationship of mutual trust and respect and can then offer a broader perspective of truth because of the emotional distance the professional relationship offers.

--A coach is an individual who has the tools, techniques, focus, wisdom, intent, and knowledge to elicit a client‘s values, goals, and beliefs. The coach is then able to create a plan of action and a strategy for success toward a defined outcome or result and is able to guide the client.

--A coach is someone who is able to remain focused on the client‘s outcome without becoming attached to it personally and by maintaining the flexibility required.

--A coach is a model for success by remaining congruent in his/her own life and how he/she lives it.  A coach is a congruent model for success in how to be proactive in life. For a coaching-client relationship to be effective, the coach must remain congruent and be trustworthy. This can only be achieved by creating rapport and by demonstrating respect and honesty.

# Practicing What you Preach as a Coach

A tool only becomes effective when being used by a skilled craftsperson. As you develop your strategies for being a Life Coach, it is important that you come from a grounded place with flexibility and persistence, patience and creative thinking, because this is what coaching is all about.

For excellent results in any of life‘s endeavors, it is important that you first choose an excellent tool. This you have already done by selecting this program to be your foundation for information and education while you develop your coaching skills. As you become an excellent craftsman, you will automatically guarantee good results through practice, application and experience.

In building relationships to create healing and success, the primary relationship has to be with yourself. Learning to be fully congruent within yourself is so vitally important to your success as a coach that this concept will be the focus of the first section of this course. By experiencing and incorporating the basic elements you will be using as a coach for yourself, you can then become a model for what you will be sharing with clients, employees, students, customers, and patients. The more solid you are in your beliefs and behaviors, the more you will be perceived as a competent guide and leader.

Each person entering this coaching program comes from a unique background and personal history that influences current interactions. With the information in this manual and in the videos, it is now possible for you to be proactive in living your life. From this solid foundation you will then be able to facilitate this experience with others.

# Defining Your Niche

Upon successful completion of this course you will be eager to share with the world that you now have a unique skill, talent and expertise to share. You may even already have an idea of what you can bring to people to enhance their life skills. The more you are knowledgeable and confident in what you can offer the client, the more that will come across to the client in the form of comfort and trust. It is important that you know what your focus for change is and what standards of interaction you expect.

As a coach, when you are clear on the guidelines for coaching and your intentions with each individual client, the sessions will bring more clarity, satisfaction and results. There will be measurable goals that build confidence into your work once they are achieved.

# Mission Statement

Every organization has a mission, a purpose, and a reason for being. Most of the time, the mission is why the organization was first created: to meet a need identified at some point in time. As a Life Coach candidate, you too have identified a need in the industry for your services. As described above, you may have a niche in mind, or a specific field in which you may choose to practice, for example your focus could be on business. Your niche may be helping people manage their career, finding a new job, or managing work stress.

The power and effectiveness of the tools outlined in this course has no boundaries and they are applicable in all aspects of life. We encourage you to make them an integral part of your life by sharing them wherever you go as they will allow you to practice in as many fields as you may choose ranging from wellness to career, and all designations in between.

Regardless of where you plan to concentrate your application of the knowledge gained through this course, you will need a mission statement to inform the public and prospective clients of your clear direction and determination. Because of the different directions we may choose to go in life, you will be creating two mission statements - a personal mission statement, and a business mission statement.

A good mission statement has an accurate explanation of why your business exists, what your business does and what it plans to achieve in the future. It articulates your businesses' essential nature, values, and work. This needs to be communicated in a sentence or brief paragraph that is easy to understand by most anyone who reads it.

If your business will be operating in a specific niche, the mission statement needs to be free of industry terminology, abbreviations, and shorthand privy only to that field. An effective and well written mission statement should resonate with you as an individual as well as with what you do as a business, while communicating to your prospective clients exactly what results they may expect to gain with you and your company.

A good way to create your mission statement is to address three key issues:

1. What is your purpose as a coach? Answer this in a clear and concise way.

2. What will you do as a coach to address your clients' needs? This is an opportunity to let them know how what you do is different, special, and tailored to their needs.

3. What values, beliefs, and intentions guide you as an individual and as a business?

**Examples:**

**Office Administrator:**
*Bringing integrity, balance and equality to the offices of Bayer, Watts and Gabe.*

**Athletic Trainer:**
*To create the optimal training environment for individual success.*

**Fitness Educator**:
*To provide the best possible learning environment to encourage creative, intellectual expression while having fun.*

**Physical Therapist:**
*Guiding clients to their health and fitness goals with 3D graphics, Exercise Physiology, and Biomechanics.*

# Life Coaching Business Model

Having a clear business model will facilitate the flow of the entire interaction of building a client base and an on-going referral network. Here are some questions to think about:

Will you be seeing clients in person or are you setting up a phone coaching business, or a combination of both?

What is the time frame for each session?

What are your prices?

What location will you be using?

**Frequently asked questions that you may get from a client, followed by some suggested responses:**

**Q: —***Does this really work? I have tried so many other things before.*
**A: —**Absolutely! You and I are a team and we are going to discover what is temporarily keeping you from your goals and what to do to resolve this. All of the work you have done before will be a foundation for us to finally get the results you want.

**Q*: —****How long will it take to fix my problem?*
**A*: —***As you may know, each person's situation is unique, and you will begin to get results from the very first session. As we set goals and define the challenges you are wanting to resolve, it will be easier to give you an estimate of how many sessions will be useful for you to reach your goals.

**Q: —***How much will it cost to reach my goals?*
**A*: —****My fee is $_____.*
Say this with confidence and a credible voice. If you have a —package deal this is the time to offer it. Many times, it is beneficial both for the coach and the client to offer packages of 10, 5, and 3 sessions with a slight discount per session as *compared to the client purchasing one session at a time.*

**Q*: —****How often will we work together?*
**A: —**I like to work in hour to 1½ hour sessions mostly once a week. However, the choice is yours to decide what is most convenient for your schedule.

The higher the number of sessions the client chooses to purchase, the lower the price per session he or she will pay. Multiple sessions purchased up front show the determination the client has to make the necessary choices to create the change they are looking for.

Be certain to inform your clients as to how you bill for your services, typically by the hour or number of emails. Depending on the sensitivity of the issues being explored, if more time is needed to come to a completion on an issue, additional time may be billed at the hourly rate; this has to be stipulated up front. For instance, if the session is 1½ hours the client pays for the full session, plus ½ the rate of the full session. So, if the fee for a one hour session is $100, the fee for 1½ hours would be $150. If they seem concerned about the price you can suggest the following:

*—I'm curious, what will it cost you to not have the tools you need to move forward? Remember this is your investment in your life and in yourself.*

Q: *—Do you take insurance?*
A*:* —Since our work together is educational in nature, medical insurance does not cover this work. However, many times these sessions can be a tax deduction as an educational business expense. I am not able to bill your medical insurance for our work together.

As you define your niche – you will come to understand what is customary for your clients. The responses will vary depending on your clientele, the type of coaching you are doing, and whether coaching occurs in person or telephonically. Some coaching relationships evolve into on-going support systems with no particular end date, while others are based on problem resolution or coaching related to a particular skill set. Be clear what type of coaching solutions you offer and share this information with your prospective clients during the initial consult to make clear all available options.

When you are prepared for these questions and any other questions that you predict may come up, you will sound more credible, which in turn, instills more trust.

# Beliefs and Guidelines

(Answer these questions for yourself before giving them to your clients)

I have included some questions that might be useful just to get you started. Please feel free to respond in the manner that is most comfortable for you.

About Yourself: Who are you at the very core of your being?
What are the guiding principles or values that you live by?
What is important to you?
What is possible for you to accomplish?
What are you capable of?
What is your sense of your self-worth?
What do you deserve?
What (if any) are your limitations?

About Life: What are your passions?
What is your mission?
What are you here to do?
What is life about?

About Coaching: What is the job of a coach?
Who is responsible for creating change in the client?
What has led you to want to be a coach?
How will being a coach benefit your life?

About Change: How easy or hard is it to change?
Can change last?
What is the value of flexibility?
What creates change?

Once you spend some time with these deeper subjects and get a real sense of what this is all about for you, you may begin to notice some areas that will need to be updated or developed more fully. It is also important to modify any of your personal filters or perceptions that may be limiting or toxic, such as a —I'm not good enough, —I just can't trust people – they are out to get me, —I'm not good with money, etc.

It is important to know your personal beliefs and values in order for you, as a coach, to be careful to keep any personal judgment or agenda separate from interactions with your client. This is how a coach is able to remain focused on the clients' outcome, yet not become attached to it.

# Getting Started with Your Client

All successful coaching is based on creating and maintaining a connection of safety and trust between you and your client. These are some of the tools that will serve you well in establishing a solid working relationship. Then you can proceed to facilitate states of excellence and strategies of action that get results!

**Establishing Rapport**

Rapport is about aligning with another‘s reality, listening respectfully, and beginning to create an atmosphere of openness and trust – a sense of safety. We create rapport in many ways, some skills will come naturally from your personal history of relating to people, and there are particular skills to learn that will establish the connection with your client purposefully. Without rapport, very little progress is possible, so it is crucial that you pay attention to this aspect of the relationship.

The initial meeting with your client, whether by phone or in person, is the time to begin setting a foundation for the relationship, gather information about the needs and wants from your client's perspective, and begin to create a road map for ease in reaching the client's destination.

Basic rapport skills begin with aligning in the physical realm of rhythm and breath, pacing (matching) and then leading movement to creating change. Pacing and Leading are terms that describe how important it is to step into the client's experience and let them know that you understand their dilemma and have the skill and wisdom to help them heal their problems and meet their challenges.

**Example:**
Client: In a sharp, loud and fast paced voice states. ―The traffic was awful today – I am so frustrated with my commute!

Coach: Also in a sharp, loud fast paced voice paces the clients‘ on going reality by saying: ―Wow, the traffic seems to be really frustrating to you, doesn't it. Take a breath and then soften your voice and begin to slow your rhythm, lower the volume, and lead the client on to a better state by saying: ―I‘ll bet it would be good to find out what choices we might be able to discover for how to deal with that.

# Listening Skills

Attentive and active listening will assist in establishing rapport and communication with your client and bring you high quality information. Clients will give you what they need when you are open and really listen to the content, the structure of the presentation of the content, and especially decipher between the lines of the content to the structure of the patterns.

**Components of an Active Listener:**

--Quiet internal dialog and mind-chatter.
--Pay attention to non-verbal communication cues such as body language, voice tone, gestures, facial expressions, using only one side of body to gesture, a foot moving up and down, etc.
--Focus on what the client is saying and create internal images or a movie of what they are describing.
--Listen for limiting beliefs woven into the content of conversation that your client may or may not be aware of consciously.
--Imagine yourself as a good detective: patient, curious, logical, looking for the facts or clues to the puzzle.
--Backtrack what you are hearing to get agreement and support clarity.

# Backtracking (Aligning with your Client)

An important part of active listening is the ability to backtrack what your client is saying. This means to repeat back what you hear in their request to match their words, gestures and rhythm. This skill keeps the conversation on track, lessens the chance of information slipping through the cracks or being misinterpreted, and is comforting to the client as they feel supported and important.

**Example**:
Complaint:
*—I'm never able to get through all of the things on my list and I feel totally overwhelmed.*

Non-verbal: Big sigh, shoulders sag, and hands drop to lap.
Voice tone: Flat monotone.

Typical and **not** useful responses a person might make:

Judgmental: Well, you just try to do too much so you can seem important.
Blaming: It's not your fault – your boss must be a tyrant to work you so hard.
Giving advice: Well, why don't you just make a shorter list?
Fixing: Oh, I'm so sorry for you. Here, let me help you get it done.

Appropriate Backtracking response of a good communicator:

—So it seems like you can never get through all of the stuff on your list, is that right?

Begin to open up with your language while doing the backtrack. Using the words "***Seems like"*** makes it just a perception, not a reality.

Watch for head-nod (if working with a client in-person) or other sign of recognition that the client feels heard or understood. Now the conversation is ready to go for more information gathering and eventually a menu for solution. For instance, things that contribute to feeling overwhelmed are generally:

--Time urgency.
--Taking responsibility for everything.
--Trying to be perfect.
--Not having the skills, practice, or belief of how important it is to set appropriate boundaries.
--Trying to be accepted or good enough.

**Exercise: Practice backtracking and pacing (aligning with client's reality) in everyday conversations. This can be with friends, family members, or anyone you have a conversation with.**

Describe where you use this and notice the effective results.

# Assessing the Client

Initial interview:
Create rapport and safety. Build the relationship through pacing (listening and aligning) and leading (suggestions, directions, skills for better results) with respect, patience, openness and curiosity.

Gathering Information: What are the presenting patterns and filters presented verbally and non-verbally by your client?

Perceptual Positions: How does the issue look from the perspective of self; then stepping out to a neutral observer perspective; and gathering a sense of how the other person in the interaction is filtering reality from their point of view.

Eye Accessing: As a person accesses information from the brain, the eyes mirror the activity of the strategies for how a person is actually seeking the information. Understanding what the various eye access sequences could indicate, can be very useful in discovering how a person might be keeping themselves stuck and how to lead them so they can use their brain more efficiently.

When a person looks:
Up and to their Right they are visually creating something.
Up and to their Left they are visually remembering something.
Across to their Right they are auditorily creating something
Across to their Left they are auditorily remembering something.
Down and to their right they are kinesthetic, based on feelings and emotions.
Down and to their Left they are using their internal dialogue.

To determine how someone is organized, ask two to three questions that require access to visual recall.

Opening question: **“What do you want to be different in your life** (or context of client‘s choice)**?”** This question leads the client to focusing on what they do want.

As a coach, you want to establish that it is the client's responsibility to follow through on the tasks the coach gives and the client is accountable for his or her own change. Opening questions that lead to misunderstanding and future difficulties are along the lines of, —What‘s wrong? (leading the client to dwelling or focusing on the negative, or —What can I do to help you? (which implies it is the coach‘s responsibility for the change).

Create a checklist for yourself of what is important to notice in addition to the content the client gives you.

1. Posture: Positional and Movement
2. Eye Accessing Orientation (where a person ―looks‖ as they think or speak. This demonstrates what type of processing the client is using – VAK: Seeing, Hearing or Feeling and is useful to align with when responding).
3. Gestures
4. Breathing and voice rhythm, pitch, tone and tempo
5. Facial expression
6. Listen for the Criteria words and Limiting Beliefs (Thought Viruses) – These become filters of the world and can be used to create effective change.
7. Personal Perceptual filters:

Authority: Who makes the decisions, who is in control?

Internal control: From inside the person out into the world. I gather information, evaluate it and then I decide what action to take.

External control: Power and control come from the outside world over the person. What do you think I should do? I'll wait and see what happens. What will they think?

Motivation Direction:
Towards what is wanted – Proactive, directive, decisive, able to risk.

Away from what is not wanted – Reactive, fearful, hesitant, limited.

# Getting Started

As the coach, it is your job to gather information about the issue, define the specific focus, goal, or intent and then to segment the problem into a step-by-step plan to create change. Whatever the issue, it requires you to be a good detective, to search for the underlying patterns or limiting beliefs that need to be released, then teaching and installing new skills and capabilities, powerful beliefs that support the client‘s values, and other strategies and patterns for effectiveness.

As a life coach, your main job is to assist your client in being able to clearly define the current problem or challenge and where this comes from or what is supporting it. Then to fully decide what is wanted - the desired state of being and experience, when that problem no longer exists.

# Defining the Present State or Challenge

—How is this a problem or challenge in your life?
What are the needs and wants of your client?
What are the limiting beliefs or assumptions?
Where/when did the challenge (problem) begin?

All change work can be divided into two main categories:
1. The client has a particular goal. There is nothing apparently stopping them and yet they are not reaching their goal. Or, there is a missing link between the current skills of the client and what skills are needed to be fully successful. In these cases the coach looks for the roadblocks and builds new skills and expertise.

2. The client is currently experiencing or participating in an activity, thought, emotion or behavior that they no longer want to be involved with and yet they continue to make choices that lead to the unwanted behavior. The client will often say they feel they will not or cannot stop the old behavior.

# Defining the Goal or Desired Outcome

This part of the process is often overlooked when a person gets bogged down in problem solving or fixing. Nature doesn‘t allow a vacuum, so before we help a client remove a problem or change a behavior or response, it is crucial that the client has already created and prepared what he or she is wanting instead. This will make it ecologically sound.

Ecology in the context of coaching means evaluating and considering the impact of the proposed change on the larger system. The coach can then proceed with the technical work with a much better foundation of understanding for having the change last through time, as the client develops and practices new behaviors and responses.

**Typical Challenges Clients bring to a Coach:**

--Lack of motivation
--Lack of self-esteem
--Anxiety/Worry
--Skill Building
--Indecision
--Self-Care
--Addictions
--Tardiness
--Health Issues
--Relationships
--Procrastination
--Reactivity
--Phobias
--Transitions
--Disorganization/Clutter
--Setting Boundaries
--Anger

Whatever the issue, as a coach your job is to be curious, to search for the underlying pattern or limiting beliefs that are holding your client back. Then you must install new skills, powerful beliefs that support the client's values, and patterns/strategies for effectiveness and results.

**Example of a Common Challenge:**

Presenting issue or behavior the client wants to stop:
**Procrastination -** How it manifests for this particular client:

Not getting things done in a timely fashion
Putting things off to the last minute, creating stress and sub-standard results.

Possible Underlying Causes:
Conflicting goals
Benefits or Goal not clearly defined
No goal at all
Ineffective motivation strategy or time management strategy
Inability to set appropriate boundaries
Task seems:
…larger than life.
…never-ending —If I finish, they will just pile more on.
…impossible for me —I'm not good enough.
—Success could require me to do x behavior that may lead to a perceived danger or overwhelming responsibility.

Structure of a good motivation strategy:
--The benefit or outcome the client is wanting must be more important or compelling than the struggle or work needed to achieve the goal.

**Example**: The client wants to exercise and needs to be at the gym four days per week to reach their weight/strength goal. What is the benefit through exercising that the client wants to experience? i.e. Fitting into the bathing suit for the cruise; being able to run a marathon; lowering their cholesterol so they can be here for their grandkids.

--Understanding what is wanted and what is not wanted, both are important.
--Focus on the goal or end result desired – not on the process to get there!

Listening Skills:
Being heard by others – getting my point across
Being able to follow directions for successful completion of tasks

# The Backbone of Coaching: Feedback and Feedforward

The best teacher uses their experience and evidence, without judgment or negativity.

**Feedback** – Evaluate what happened: Did that action get your client closer to the goal? If not, what part of the action did not work? What part of the action (if any) did work to move toward achieving the goal?

**Feedforward** – Dress rehearse the new behavior or thought patterns for future success. What are the lessons learned from this experience that can be applied toward the future to bring better results? What new choices will work even better in the future to move closer to the results that are wanted?

Often expectations are based on assumptions, hope, and imagination and are not based in reality. Typically, a challenge or frustration occurs when something happens that does not meet a client's expectations.

As a coach, your job is to create a learning cycle for the client through your suggestions and recognition of patterns that in the past have not gotten the client the results they are wanting. Eliminate giving advice which has a rare chance of being accepted or appreciated by the client. Use softeners to align with the client and be respectful such as:
—I‘m curious…
—I was wondering…
—What I offer is…
—What would happen if…?
—So that I am clear, what I heard you say is…(backtrack)….

# Developing a Plan of Action

First develop a clear sense of what the goal is or the result the client desires. An excellent tool for doing this is a set of questions called a Well-Formed Outcome. When you are coaching, use this form as a template to help gather a detailed roadmap of current reality, which then can lead to generating success.

Once the Well-Formed Outcome information is gathered, then you will be able to establish the modules for change, and the content and structure of the coaching sessions that will lead to the client‘s success. You and the client will discover what the limiters or road- blocks are currently, which then become the focus for creating change. The Plan of Action also needs to have built in accountability for the client with tasks or homework to bring the new skills and behaviors into a level of competency leading to easy and solid accomplishment.

# Well-Formed Outcome Exercise

1. ***"What do you want?" (Desired state)***
a. State in positive terms. What is wanted, rather than isn't wanted.
b. Initiated and controlled by client.
c. Specific, sensory-based description of the outcome. What will the client see, hear, and feel when the client has their outcome?
d. Appropriate chunk size. A well-formed outcome is a manageable sized task, appropriate for the client to achieve.
e. Meta-outcome: **"What will having this outcome do for you?"** Verifies that the client will have value from getting their outcome.

2. **"How will you know when you have it?" (Evidence Procedure)**
a. Appropriate and Timely Feedback. Sensory based evidence that the client has achieved the desired outcome.

3. **"Where, when, and with whom do you want it?" (Context)**
a. Is the clients' choice of contexts ecological? Often, outcomes are ecological in one specific context and not another.
b. —Is it sensory-based? Specific cues leading to a new behavior?

4. **Ecology. "How will your desired outcome affect other aspects of your life?"**
Evaluate the desired outcome for possible negative or positive consequences to other people and other contexts.

5. **"What stops you from having your desired outcome already?"**
a. Sensory based description. Verifiable in current reality.
b. Language that deletes, distorts, and generalizes reality: always, never, they, every, I can't…I have never done this before…etc.

6. **"What resources do you already have that will contribute to getting your outcome?"** Sensory-based description or demonstration.

7. **"What additional resources do you need to get your outcome?"**

8. **"How are you going to get there?"**
a. Does the client have more than one way to get there? How else might you achieve your outcome? The more choices the better.
b. Chunking. Identifying the first step - making sure it is achievable gives the client a roadmap to success in their control. Next, identify (chunking) other steps along the way.

# Eliciting a Well-Formed Outcome

**1. "What do you want?"**
a. Be sure your client gives you an answer that forms a clear picture of what they do want. If they tell you what they don't want, that is only ½ of the equation. In order for the full system to be able to move forward there has to be a solid road map and a full detailed image of the desired end results.

**Example:**
**Client**: —I want to stop procrastinating. (Stated in a not)

**Coach**: (Backtrack for clarity and pacing) —So, you want to stop procrastinating. Hmm, Ok. Well, when you stop procrastinating, I'm curious, what will you be doing instead? (reframe to get the positive)

**Client**: —Well, I will be getting my reports out on time at work.

Getting reports out on time now becomes the outcome to work on.

b. Make sure the end result or outcome is within the control of the client.

**Example**:
**Client**: —I want my spouse to stop bugging me about losing weight.

**Coach**: —So, you want your spouse to stop bugging you about releasing the weight you don't need any longer, is that right? (Slight reframe in the backtracking to begin to get some movement on the issue).

**Client**: —Yeah, he/she is always commenting on my eating habits.

**Coach**: —I agree, that might be great if we could just tell your spouse to stop bugging you. And, your spouse isn't here today. What I can do is guide you to discovering how to influence the situation and be the kind of person who can set boundaries that are healthy and firm. And that skill might be of value for you in other situations as well, right?

c. Make sure you get a factual or tangible description of the outcome.
**Example**:
**Client**: —I need to exercise more.

**Coach**: —Ok, since you have decided you need to exercise more, what would that be

like? Are you doing any exercise now? What kind of exercise would you be doing? How often do you want to exercise? What time of day will you plan to be exercising? Whose idea is it for you to exercise?
(Note: These are just some sample questions that will help get more specificity. Anytime we hear a comparative word like more or better it is an indication that the client is comparing to some standard or person).

d. Often the client will give a conceptual or big picture goal. It is useful to chunk the goal down into a manageable size piece so that the client does not get overwhelmed and give up before they begin. It helps to begin focusing on an immediate goal that will ultimately support the bigger picture.

**Example**:
**Client**: **—**I want more money – in fact, I want a million dollars!

**Coach**: **—**So, you want a million dollars, right? When do you want that by?

**Client**: **—**Well, as soon as possible.

**Coach**: **—**OK, let‘s make a plan to get you on the road to having a million dollars. What do you think would be a good first step? Do you have an idea about how you want to get that million dollars?

**Client**: **—**I have been reading about investing in Real Estate. I see lots of people who make a lot of money in real estate.

**Coach**: **—**Ok, so let‘s explore in what way you could begin to invest in real estate that will get you started on your way to having a million dollars. Are you interested in getting your real estate license and selling houses, or maybe buying commercial or income property, or I heard about a process called flipping that sounded interesting…what are your thoughts?
(Note: As a coach, when you make suggestions…always do just that, let go of fixing! Give a menu or multiple options and then leave it open for your client to come up with their own answers – kind of like priming the pump on a well).

e. The **—**meta-outcome is the result or benefit the client perceives they will gain by having the outcome. Often, this can be the inspiration to motivate the client to action. Other times, it can give you more avenues to guide your client, especially if the original outcome is not something that is healthy for the client in your opinion.

**Example**:
**Coach**: —What will being able to set healthy boundaries do for you? How do you think doing this will make your life better?

2. **"How will you know when you have it?"**
Often the evidence is quite obvious as to when the goal is reached. Other times it is very important to get this result cleanly defined. One syndrome that happens to people who are never satisfied is that they never acknowledge the completion of a goal or task. They do not have a specific, measurable result that they can take pride in accomplishing.

3. **"Where, when and with whom do you want this?"**
This question helps the client define the larger context of the goal, puts it in a time frame to make it more real, and checks for others that are involved either in accomplishing the goal or being part of the result.

4. **"What other aspects of your life will be affected by achieving this goal?"**
The focus here it to have your client expand the frame and imagine into the future having the result already. Now notice any positive or negative effects accomplishing this goal may produce as a by-product.
—Will anyone in your life be impacted by your goal, and if so, how?
—How will you be perceived by others when you accomplish this goal?
—What do you have to give up to make the gain and what do you gain by giving up something in your current experience? This is the —ecology-check question and can prevent regrets and mistakes by being aware of the larger influence the client's desired change will have in their world.

5. **"What stops you from having your goal?"**
The response to this question becomes the focus for the coach to guide and assist the client. Here you will uncover hidden agendas, have an awareness of new skills that are needed, and elicit limiting beliefs from the past that emotionally block the client from easily having what they want. It is here that our Basic Life Coaching course has the advantage over giving advice, being just a cheerleader, and trying to fix a problem. As a Basic Life Coach, you are developing the tools to facilitate your client in unhooking emotional and mental limitations and clearing the way for developing new skills and freedom of thinking.

As your client describes a problem or what seems to be blocking them from achieving them attaining their goals – listen for blaming, excuses, whining or judgments against themselves or directed to others. These linguistic behaviors will keep a person looping inside of the prison of the challenge because there is no proactive sense of taking responsibility for making the necessary changes for themselves. As a coach, your first

duty is to make sure the client fully understands that this change is within their control, inside of themselves, and that when they make definitive decisions, set clear boundaries, and influence from a place of confidence, then they become the director of their life.

6. **"What resources do you already have to achieve this goal?"**
The value of this awareness is to help the client see that they already do have skills and resources to achieve what it is they are wanting. Sometimes the strategy they are using in another context is the exact strategy that they need for this current challenge. By becoming aware of their own gifts and talents, it contributes to their confidence and willingness to stretch into new accomplishments.

7. **"What additional resources do you need to achieve this goal?"**
Focusing on this aspect of the issue helps define what is needed and where they may need to develop a new skill, make a clear decision, and/or seek assistance and guidance from other sources. It narrows the list of what will have to be in place for them to achieve the goal by giving them more clarity. This clarity can help prevent or calm a feeling of overwhelm that comes from thinking that the goal is too huge and unmanageable. It also begins to contribute to making a plan of action.

8. **"What is the first step in accomplishing your goal?"**
This question is designed to get the client into action. Often it is inertia that has been keeping someone stuck. With this question, the client faces a realistic sense of how to reach the goal. Make sure this first step has a commitment as to when and where and accountability back to you as the coach for them to follow through.

One of the best ways we can serve our clients is to be the encourager and point person who will make sure they do as they say they will for themselves, and if not, then you are there to help them —chunk it down into an even more manageable size piece and to release any deeper concerns or worries.

# Exercise: Circle of Excellence

Purpose: To access and stabilize states of excellence. To have positive states of excellence being automatically available in previously challenging situations that may occur in the future.

Coach says to client:
1. Setting up the Circle of Excellence: "Imagine a circle on the floor in front of you. What does it look like? What color is it, what material is it made of? Are there any sounds in the circle? You get to create this space just for you."

2. Have your client think about a state of being that is a resource for them. "What state of excellence would you like to have more of in your life? Think of a state where you have resources available to you that allow you to act in ways that will support you and protect you."

3. Anchor state of excellence to circle: "Think of a time when you were in this state in a way that was fully satisfying to you. Pretend you are there now. When you experience how that feels to the fullest level, step into the circle." Give gentle guidance with a hand on the shoulder and motion to client to step into imagined circle on the floor.

4. Separator State: "Now, step back out of the circle, leaving that state of excellence there." Distract with any question or statement that will elicit a neutral state such as, "Recite your phone number backwards."

5. Test: "Step back into the circle, and notice how that feels now." Calibrate for a return of the state of excellence physiology you saw in step 3. "Now step back out of the circle." Create a separator state again.

Note: If the response is not as strong as desired, elicit another example that gives a stronger response, repeat steps 3, 4, & 5. You may also add other resources at this point by repeating steps 3, 4, and 5.

6. Chaining: "In a moment I am going to touch your shoulder (have them touch their own shoulder if you are doing this session via phone). When I do, I want you to immediately step forward into your circle, into that excellent state. First, I want you to think of a time or situation where you would like to have more of this particular state of excellence." As soon as your client begins to access the previously unresourceful event, touch their shoulder as a signal to step forward into the circle. Make sure client accesses the new state.

7. Test: Ask your client to step back out of the circle. "Where in the future might that situation occur again?" or "What happens now when you think of what used to go wrong?" Make sure that your client only briefly accesses the unresourceful state and then automatically accesses the state of excellence.

8. Future Pace: Have the client creatively think of a way to bring their circle with them to be automatically available in many other situations as needed in their future. Suggestions: Have it in their heart, behind their ear, under their watch, etc. Create or imagine how having these resources will be in future situations.

# Accountability

The last thing a coach wants to do is become a dictator or policeman for the client. The coach‘s job is to guide, encourage, challenge and teach skills for your client to be successful in their own particular way.

It is important that you create feedback loops between you and your client to measure progress along the way. Coaching is an interactive process based on mutual trust, with compassion, directness and with ample doses of humor and patience.

Set up a program that has accountability and responsibility in equal measures. You might give homework assignments‖ for them to bring back to you that move in the direction of the goal. You may have them journal their progress and report any successes and challenges.

**Flexibility and respect are key components in having a powerful influence and relationship with your clients.**

## Bonus #1

# The 4 Keys to Transformation

by: Steve G. Jones, M.Ed.

I am very passionate about sharing my transformation coaching principles with you. Many of us lead stressful and complicated lives. There is no better time than now to improve and transform your life. Never before have we been so stressed out, burned out and worked so hard only to feel it taking a toll on our health, relationships and the quality of our lives.

Maybe you have a business or you are really happy with your job, but you have noticed that your overall health, well-being and fitness has suffered. Or you might devote a lot of your energy and time toward creating a thriving marriage or relationship, but maybe other parts of your life could use some improvement. Whatever area of your life you are devoting the most energy to at the current time can leave you feeling like you have to make sacrifices in one or more of the other important areas of your life as a whole.

This isn't the part where I tell you there's a magic wand and all you have to do is close your eyes and blink to make it all be magically aligned. But I will tell you, that I am here to share with you a system of thinking and action items that when put into practice can shift your life right into balance and create a new, rewarding lifestyle.

Whether you realize it or not, most everything you do on a daily basis, from your recurring thoughts to your patterns of living and the way you take care of yourself—is essentially just the way you've always done it in the past. And that's good news! It simply means that you can learn how to trade your old habits and ways of doing things for new ways that empower you to live your best, most balanced life.

When you imagine your life just the way you want it… Where are you? What are you doing? What is your life like? Let go of things that are holding you back and really consider what this means to you for a moment. Once you have the vision, make it powerful by writing it down and declaring what you truly want for yourself and your life!

The main issue for most of us is that we don't know what we want. That first step is a critical one for identifying the number one way to begin to enjoy your life. Identifying what you want in several major categories of your life is the first step in creating your personal roadmap to success.

Once you know what you want… how do you get there? The answer has a lot to do with how you do your life on a daily basis. How you "do" your life is the process that catapults your success, or not, in reaching your goals. The fastest way to go from where you are now to where you want to be is a straight line, one that is unobstructed by chaos and disorder, and that has you in total control, like a Zen master solely focused on that one present task in the moment.

**Transformation Skill #1: Time Management**

Time management is your foundation for how you "do" your life! It's the make-it-or-break-it difference between surviving in chaos, being overwhelmed and never feeling satisfied, and knowing confidently how to achieve any goal you set out to accomplish in record time. What would your life be like if you had more time in your day to do the things that truly give you pleasure and freedom? I'm going to share with you just how easy it can be to get there in 5 simple steps…

**Step one:** Write down your personal goals and the achievements you are ready to create for yourself. You want to create longer and shorter term goals and break them into stages. Your longer term goals may be planned out over the course of a year (or more, depending) and have stages if they are larger and more complex. Your shorter term goals are more like three to six months, and should be broken down into weeks.

**Step Two:** Every week begins with a clean slate. The single most productive way to start your week is to begin by making a list of what you CAN accomplish in that week alone without overwhelming yourself and taking on too much. Then make it a daily practice to create a task list for each day that allows you to break down what you need to do in each day of the week.

**Step Three:** Create time blocks for your life in your weekly schedule. For example, you will want to plan time for your self-health care such as making time daily for fitness training, how you will nourish yourself with meals, how you will set up your consistent "To Dos" for your life, business or career, and when you will schedule in dates with your loved ones. Your weekly time blocks should also account for the agendas and time it will take to accomplish specific tasks that are going to get you one step closer to your goals every day! This way they are all broken out and planned. You can work on creating solid boundaries and be laser-focused to accomplish only one thing at a time so that you can be more successful and also so that you will schedule the time to do the things that matter in your life. Make no compromises.

**Step Four:** Identify what it means to you to meet your goals. End each day by making a

note (mentally or writing it down) of all that you actually accomplish in a day! Set up rewards for what you will do or give yourself for achieving at least 80% of your goals every week. Remember, it's NOT about perfection.

**Step Five:** Take 5 minute breaks to disengage mentally every hour during your day and to give your mind a chance to reset and perhaps even stretch your body. Make a lunch date with yourself as often as possible. Pack yourself a nourishing lunch and go to a beautiful, quiet garden setting where you can be free of noise, traffic and interruptions. Enjoy eating slowly and relaxing for an hour. Maybe listen to music… or invite a friend to go with you sometimes.

As you begin this new way of managing your time wisely and efficiently, you will find that your productivity will skyrocket! You will get more done in less time and feel better about yourself than you have in years. Your stress will be lower, and as a result you will feel more creative, energetic and vibrant!

You may come up against road blocks and old habits that may try to stop you in your tracks. Just practice being focused on one project at a time and setting your boundaries. Keep in mind that coaching is an excellent way to help you clear the obstacles and guide you in refining your system for success.

**Transformation Skill #2: Personal Growth and Self-Improvement**

Life is truly a complex and multifaceted occurrence that can be rich with rewarding experiences, joyful emotions and people who enhance every aspect of it.

Imagine your life as if you had everything you ever wanted, and could do anything you dreamed of. What would it feel like to sit back for a moment and imagine all of your deepest desires and dreams as your reality? Go ahead, take a deep breath, lean back and close your eyes… take it for a test drive and see how that feels!

Your future life looks pretty fantastic, right?

Now think about where you are right now and what challenges you face in your daily routine (or lack of routine), then paint the picture of your current reality and state of being. Do you feel close to where you ultimately wish you could be, or far away? Either way… bridging the gap from where you are now to where you want to be is the key!!!

Life is a constant process of evolving and growing, learning and experiencing.
The truth is that when we are actively present and engaged in being curious, learning and growing, we are aligning more fully with our own divine nature! Our minds are the

single most powerful tool we have. The mind alone can create astonishing results. In fact, it longs to be challenged and developed. If you truly examined where you are now vs. where you really want to be, would you find that what stands in the way has a lot to do with the limiting beliefs you've developed over your lifetime?

Close your eyes and visualize your vision for your ultimate life. Write down exactly what you see, feel and want to experience here. Be as specific as you can; the process of writing it down begins to set it all in motion! Go for it… Write your vision of your future. Then take ACTION!

**Transition Skill #3: Connect with your Inner Self**

Do you ever feel like there's a calling in your soul that needs to be heard? If you were to really look at how you connect with your higher consciousness and/or self and the universe as a whole on a daily basis… what percentage of your days are spent tuning in and reconnecting to your spirit and exploring all that is available to you?

If you're struggling to find balance in your life, the answer is probably not too often. It's a tragedy that as a society we are in danger of becoming spiritually bankrupt. A lot of our daily focus tends to be upon things and situations outside of ourselves, and not really being in tune with all the wondrous nuances and opportunities that exist in almost every person, place and thing we encounter and experience.

One of the most important principles in creating a life with balance is creating your own unique spiritual connection that reflects your core beliefs and desired lifestyle. There are truly endless ways to find and create spirituality in your everyday life. And there are ways to practice daily having a deeper connection to all that is.

Consider all the places in your day to day life where you could begin to look for a deeper connection and meaning:

The multitude of friends and acquaintances who come into your life, what gift they bear to you, and the meaning they are there to unveil for you to learn and grow from. People are really wonderful gifts to get you to a higher level if you are able to tune in. Just remember to forgive. Mistakes are really only opportunities to learn and grow.

--Your relationship with yourself! This is the richest, most fertile ground for reaching peak potential and constantly learning to set the bar higher. All that is required is the ability to tune in and practice awareness for things to shift more easily.
--Your family members can be some of your deepest teachers, mentors and spiritual guides! My son has taught me more about love and the importance of connection than

anyone else in my entire life.
--Your day-to-day experiences, whether at work, school, home or just about anywhere can expose you to many deeper meanings.
--Your relationship with your partner, husband, wife, boyfriend, girlfriend, friend… really are just your mirror and reflect back to you all that needs to be seen, healed and deeply appreciated.
--Your relationship with your higher self, higher power, or higher consciousness. Having this is like having a warm hug from your grandfather or the person you love most when you really need it.

There are so many ways to begin to learn how to tune in and start creating more consciousness in your day-to-day life. The most important part is just beginning to practice and learning how to be present and live in the moment!

When you live in the past, you can't possibly live in the now or create your future. The more you learn to tune in and create more and more conscious awareness, the more you will be able to tune in and deepen your spiritual connection for yourself and your life.

**Transition Skill #4: Giving Back**

Philanthropy is the act of giving back of your time, services, goods, money for a specific noteworthy cause. There are so many important levels of what this means to the bigger picture. But at the end of the day, what matters is what this means to you and how your ability to give back can make a significant impact.  I often think about where we are in the world today and where the health of our nation is as a whole. In this challenging time we are in, we are truly out of balance as we try to move forward in a healthy productive effort to thrive. Everyone is talking about "crisis" instead of opportunity. The media encourages us to think about the negative emotional drivers, without much emphasis on those who are making a positive impact.

We are so powerful and have the ability to create and affect our world in ways that are both immense and minute. I think that where so many of us go wrong is in believing that even our smallest deeds may never matter or make any impact at all.

There are thousands of great stories of ordinary people who have created an extraordinary impact on their communities, the nation and even the world. Chances are you may even know someone who already has. The truth is, we are all creative beings and already posses everything we need within us to make even the simplest act of human kindness a reality that can impact the lives of so many in ways we haven't even considered yet.

How do you feel when you do something great for someone else? Energized? Happy? Like you made a difference and feel a strong sense of purpose? Yes! What would make your life truly exceptional? What one thing would you want right now, if you truly knew that nothing could prevent you from having it? And by having that, would your life and your dreams feel completely satisfying? Every single one of us is truly unique. Chances are, your answer to this question is unique and carries tremendous potential to positively impact your life and influence the lives of everyone around you.

You deserve to be fulfilled in achieving your dreams of living an exceptional life according to what you want and what is important to you. You are 100% worthy of experiencing the joy, passion, bliss and success of reaching your goals and deepest desires. You CAN take your life to the next level, and beyond. Get Started NOW!

## Bonus #2

# The 3 Keys to Balance

By: Steve G. Jones, M.Ed.

To create balance in your life I believe there are three components that you must possess.

The first key component is ***Desire***. You must have a desire for what it is you want to do. YOU must want it, not someone else. You must have a desire for what you want to accomplish. For you to have invested money to purchase this book and to have read this much already shows me that you have the desire. You must have the desire to lose that unwanted body fat. You must have the desire for change, and you must have the desire to be successful. Desire usually comes hand in hand with passion. You will have a desire for something when you have a passion for that thing. Wherever that passion is, there will also come excitement. When you desire something so much, you will usually develop a passion for that and be excited about going to attain it. You see, that desire is a must, but that desire is not enough. It takes more than that. Think about it:

--A lot of people in the world desire to be millionaires but how many of those people actually become a millionaire?
--A lot of people desire to look good physically and live a healthy lifestyle, but how many people really experience that to the fullest?
--A lot of people, like yourself, desire to get to the next level and live life to the fullest, but how many people really see the results that they desire?

I hope you get the point and see where I am going in that desire is not enough; just wanting it will not get it for you… But you must want it! Understand that desire is the first component that you must possess in the process, and if you don't have this the rest of the keys will not function the way they were meant to. Without a true desire you will eventually fail. I am not going to sit here and tell you that this is going to be easy. If it was easy you would have seen the results that you desire and would not even be reading this book right now. It is going to take hard work and some discipline. It is going to take consistency and sweat. Times are going to get tough and the road is not always going to be paved. You see, when you have that desire, that burning desire—that is what will push you through those times.

So as you can see; desire is a must. You have got to want it, and you have got to desire it! What is it that you truly desire?

The second key that you must possess is ***Knowledge***. You have probably heard the saying that people perish for the lack of knowledge. I believe this to be very true. You see, if you want to be that millionaire who we spoke about in the above example, you have got to have some knowledge on how to go and make a million dollars. You can have all the desire in the world to be a millionaire, but without the knowledge it is going to be hard to acquire that million dollars, unless of course you inherit it or win the lottery. Then you still better have some knowledge on how to make that money work for you and turn it into five million. How many times do you hear of someone winning the lottery and losing all that money within a few months time frame? That makes me sick!

You see, the same thing applies to losing weight, to being wealthy, to being successful, to having what you want. You must have the knowledge on what to do to not only make it happen, but to continue to make it happen. What kind of exercising is best for accomplishing your goal? What do you need to be eating on a regular basis? What steps must be completed to reach your goal? You have got to do what it takes to acquire the proper knowledge to be successful. You see, you can have some knowledge on how to make a million dollars but if it is the wrong knowledge or information, you are just wasting your time. You have got to have the peace of mind to know that you have the right knowledge and information.

Once you have the desire and the proper knowledge, you must then have a plan of execution, which leads us to the third key to success.

To be successful you must have a ***Plan of Action***. A game plan is the third component! I believe that this is the area where most people fail. Those individuals who have the desire to make a million dollars, and the knowledge to make a million dollars, still need to have a plan of action, a game plan. Look at any sports team from an eight-year- old soccer team to a professional team; they all have a game plan. You see, if you fail to plan then you are planning to fail! So, for you to get to the next level you must have a step by step plan of action. A game plan!

You have probably read book after book that gives you all this information but never gives you a plan of action on how to implement it. It is like the ultimate suspense movie with 30 minutes left until the end and the power goes out. You were almost there and Bam! You probably asked yourself where do I go from here or where do I begin. That is one of the reasons that people fail. Simply, they do not have a plan of action, the tools necessary to thrive. Now in order for any plan to work you must follow it step by step and execute it efficiently. A lot of people get so anxious and want to skip ahead to get to the final result. Have patients and follow the plan that works and follow it to the tee. All successful people have a system that they follow and this is why they experience

ultimate results. You see, I am not interested in you living a mediocre life. I want to see you accomplish all of your goals and live your best, healthiest, most fulfilled life you can. If you just want to be good then maybe this isn't the book for you, but if you are ready to be GREAT than start to develop your plan. Once developed, follow it until you experience great success and don't ever quit.

# Intake Form

Name:_____
Date: _____
Address:_____
_____
_____
Home Phone: _____
Cell Phone:_____
Work Phone: _____
In case of emergency call:_____
Name:_____
Phone:_____
Relation to you:_____
Date of Birth:_____
E-mail address: _____
Occupation: _____
Would you like to be added to my email newsletter? _____
How did you hear about my coaching services?
_____
Reason for wanting a life coach:
_____
Other areas of interest: Please circle any which apply:

Career/Work

Wealth/Money

People/Relationships

Health/Wellness

Personal Growth

Areas you may wish to improve (not listed above):_____
_____
_____
Name of primary care physician:_____
Address of primary care physician: _____
_____
Phone number of primary care physician: _____

Please list any medication you are currently taking:_____
_____

Please note any treatment(s) you are currently receiving from ANY health care provider(s): _____

Pursuant to [state] Business and Professional Code, I, [name], make the following disclosures: I am an employee of [company]. I am a professional who provides services that are alternative and complementary to the healing arts services licensed by the state. Each client will be interviewed and if it is determined that the services I provide can be of benefit, I will provide services in accordance with the education, training, and experience I have.

I offer the following services:

**Coaching**- This "is a process that enables learning and development to occur and thus performance to improve. To be successful, a coach requires knowledge and understanding of process as well as the variety of styles, skills and techniques that are appropriate to the context in which the coaching takes place." (Parsloe, 1999)

These services are not licensed by the state. The services do not include the practice of medicine or psychology or any other healing art, since I am not a licensed physician.

I have the following education, training, experience and other qualifications regarding the services provided:

[list]

If you have any concerns or complaints about the services provided, please speak to me.

I, (please print your name)_____, hereby acknowledge that I have been provided with the above information, have read such, and have received a copy of this disclosure.

_____

Client signature Date

# HIPPA Form

NAME:_____

**NOTICE OF PRIVACY PRACTICES: HOW INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION.**

My signature below indicates that I have been provided with a copy of this Notice of Privacy Practices.

Signature of client: _____
Date: _____

Understanding Your Health Record/Information

Each time you visit a hospital, physician, or other healthcare provider, a record of your visit is made. Typically, this record contains your symptoms, examination and test results, diagnoses, treatment, and a plan for future care or treatment. This information, often referred to as your health or medical record, serves as a:

. Basis for planning your care and treatment;
. Means of communication among the many health professionals who contribute to your care;
. Legal document describing the cart: you received;
. Means by which you or a third party payer can verify that services billed were actually provided;
. Tool in educating heath professionals;
. Source of data for medical research;
. Source of information for public health officials charged with improving the health of the nation;
. Source of data for facility planning and tool with which we can assess and work to improve the care we render and the outcomes we achieve.

This Notice describes how health information about you as a patient of this practice may be used and disclosed, and how you can get access to your health information. We reserve the right to change this Notice in the future.

Your Health Information Rights:

Although *your health record* is *the physical property of the healthcare practitioner or facility that compiled it,* the information belongs to you. You have the right to:

--Request a restriction on certain uses and disclosures of your information as provided by 45 CFR 164.522
--Obtain a paper copy of this Notice
--Inspect and obtain a copy your health record as provided for in 45 CFR 164.524. You must submit your request
in writing. and we are entitled to charge a copying fee for this service.
--Ask us to amend your health record as provided in 45 CFR 164.528. Your signature and explanation are required.
--Obtain an accounting of disclosures of your health information as provided in 45 CFR 164.528
--Revoke your authorization to use or disclose health information except to the extent that action has already been taken.
If you have questions or would like additional information, you may contact the Director of Health Information Management. If you believe your privacy rights have been violated, please discuss it with me. You can file a complaint with the Director of Health Information Management or with the Secretary of Health and Human Services. There will be no penalty for filing a complaint.

My Commitment

I am committed to maintain the privacy of your health infom1ation, as required by law. We will not use or disclose your health information without your authorization, except as described in this notice.

**Examples of Disclosures for Treatment, Payment and Health Operations**

We will use your health information for treatment within our practice. With your consent, we will also provide your outside physician or a subsequent healthcare provider with copies of various reports that should assist him/her in treating you as well.

We will use your health information for payment. For example. to obtain insurance benefits for you, forms may include information that identifies you, as well as your diagnosis, procedures and supplies used.

We may use your health information in an effort to continually improve the quality and effectiveness of the healthcare and services we provide.

Outside Medical Services: We may disclose your health information to other providers so that they can perform the job we've asked them to do, and so that they can bill you or your third party payer for services rendered. So that your health information is protected, however, we require these providers to appropriately safeguard your information.

Notification: We may use or disclose information to notify or assist in notifying a family member, personal representative, or another person responsible for you, care, your location, and general condition.

Communication with Family: Health professionals, using their best judgment, may disclose to a family member, other relative, close personal friend or any other person you identify, health information relevant to that person's involvement in your care or payment related to your care.

Other: We may disclose health information to funeral directors, organ procurement organizations, correctional institutions, public health authorities, workers compensation programs, law enforcement, and/or the Food and Drug Administration consistent with applicable law to carry out their duties.

Legal Proceedings: Your health record may be subpoenaed through the legal system.

Public Health and Safety: We may provide medical information about you if required by law, or to prevent serious threat to public health and safety.

Research: We may disclose information to researchers when their research has been approved by an Institutional Review Board that has reviewed the research proposal and established protocols to ensure the privacy of your health information.

Federal law makes provision for your health information to be released to an appropriate health oversight agency, public health authority or attorney, provided that a workforce member or business associate believes in good faith that we have engaged in unlawful conduct or have otherwise violated professional or clinica1 standards and are potentially endangering one or more patients, workers or the public.

# Cancellation/Reschedule Policy

(for in-person/phone appointments)

NAME:_____

A 24 hour notice is required for all cancellations or rescheduled appointments. If our office is not notified of a change prior to 24 hours before your appointment, you will be charged the full price of your session.

If you reschedule the same appointment more than once, you will be charged double for that session.

These fees will be charged to your credit card if we have one on file, otherwise they will be billed to your mailing address and due upon receipt.

By signing below, you acknowledge an understanding of the above policies and agree to be subject to them.

Signature _____ Date _____

# Beliefs, Guidelines and Assumptions

I have included some questions that will be useful to get you started. Please feel free to respond in the manner that is most comfortable for you.

**About Life:**

What are your passions?

What is your mission?

What are you here to do?

What is life about?

**About Yourself:**

Who are you at the very core of your being?

What are the guiding principles or values that you live by?

What is important to you?

What is possible for you to accomplish?

What are you capable of?

What is your sense of your self-worth?

What do you deserve?

What (if any) are your limitations?

**About Change:**

How easy or hard is it to change?

Can change last?

What is the value of flexibility?

What creates change?

# Putting Goals into ACTION

Start Date _____
Target Date _____
Completion Date_____

**Goal – Written in the form of a statement. Must be SMART (**Specific, Measurable, Agreed Upon, Realistic, Timely)

**Expected Results** (How will you feel when you achieve your goal?)

1.

2.

3.

4.

5.

Agree Upon with_____ Date_____

**Benefits from achieving this goal.** (What positive results will you enjoy?**)**

1.

2.

3.

4.

5.

Tracking: How you are going to measure your results?

Potential Obstacles:

Solutions and Opportunities:

| Specific Steps to Achieve Goal | Target Date | Completion Date |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |
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Is this goal in alignment with your values?

Is achieving this goal worth the time and effort involved? Yes____ No_____

# Questions to Ask Clients when they are Dealing with Conflict

1. How did you feel?

2. What did you say?

3. What were your thoughts?

4. How did you behave? (include body language)

5. What did you expect to happen?

6. Why is this important to you?

7. What old patterns occurred?

8. Describe your judgments?

9. What was/ is your goal? What result are you aiming for?

10. What do you need to express to the other person/people?

11. What do you need to express to yourself?

# Fast-Track Life Coaching Final Exam (Instructions)

Please follow this link to set up your account/login into your account to take the Fast-Track Life Coaching Course exam:

http://www.mycertificates.org/Login.aspx

Enter your email address and use your private code: Lcoach1-83

718.833.5299
www.LifeCoachingCertified.com