

IAC Coaching Masteries™ NOTE SHEET

Coach: _____ Client: _____ Date: _____ Estimated Total Score: _____

Score:	#1 Establishing and maintaining a relationship of trust		
Definition: Ensuring a safe space and supportive relationship for personal growth, discovery and transformation.	Effect: <ol style="list-style-type: none"> 1. The client is open to sharing and receiving. 2. The client perceives the coach as his or her personal advocate. 3. The client sees transformation and growth as manageable. 	Key Elements: <ol style="list-style-type: none"> 1. Mutual respect and acceptance. 2. Confidence and reassurance. 3. The client feels safe to tell his or her deepest fears without judgment. 	Distinctions: Collaborative v. Cooperative; Acceptance and Support v. Tolerance; Confidence v. Overbearing
Effective Behaviors The coach: <ol style="list-style-type: none"> 1. Uses active listening. 2. Acknowledges own humanity/limitations. 3. Is alert to indications of fear/doubt. 4. Assures the client that anxiety, doubt or fear about transformation is manageable. 5. Uses questions to uncover unrealized hopes/dreams. 6. Asks probing, challenging questions and the client responds openly. 7. Invites suggestions for better questions. 8. Demonstrates integrity in words and actions. 	Ineffective Behaviors The coach: <ol style="list-style-type: none"> 1. Asks ineffective questions such as leading or closed-ended questions. 2. Does not invite suggestions from the client. 3. Limits the client and/or does not encourage the client to explore the most ambitious options. 4. Tries to "look good" or be liked. 5. Imposes an opinion. 6. Expresses or implies judgment. 	Measures <ol style="list-style-type: none"> 1. The client willingly shares concerns or fears. 2. The client responds positively to challenging questions/observations. 3. The client shares bold ambitions/dreams. 4. The coach acknowledges own limitations where appropriate. 5. The client freely expresses emotions. 6. The client is receptive to the coach. 	
Notes:	Notes:	Notes:	

Score:	#2 Perceiving, affirming and expanding the client's potential		
Definition: The coach recognizes and helps the client to acknowledge and appreciate his or her strengths and potential.	Effect: 1. The client has greater appreciation of his or her capabilities and potential. 2. The client is more willing to take actions beyond his or her current paradigms.	Key Elements: 1. Being in empathy with the client. 2. Recognizing a wider range of possibilities. 3. Encouraging and empowering the client. 4. Challenging limiting beliefs.	Distinctions: Believe v. Judge; Enable v. Push; Expand v. Stretch
Effective Behaviors The coach: 1. Offers sincere encouragement. 2. Expresses belief in the client's potential. 3. Declares commitment to the client's success. 4. Gives specific positive feedback referring to the client's behaviour and performance. 5. Reminds the client of his or her capabilities, strengths, talents, knowledge and experience. 6. Inspires and evokes the client's greatest potential. 7. Taps into the client's desire to leave a lasting legacy.	Ineffective Behaviors The coach: 1. Cheerleads. 2. Accepts rather than is curious about the client's perceived assumptions, limitations, obstacles. 3. Challenges beyond what the client can handle so that it becomes discouraging. 4. Pushes his or her personal agenda in the guise of support. 5. Manipulates the client. 6. Makes the client wrong. 7. Creates client dependency.	Measures 1. The client no longer held back but excited and moving forward, talking about and planning actions. 2. The coach encourages more action from the client beyond the client's comfort zone where appropriate. 3. The client is empowered and accepts responsibility. 4. The client has motivation for action and completing the assignments. 5. The coach inspires and evokes the client's greatest potential. 6. The client recognizes his/her own potential. 7. The client feels validated and understood.	
Notes:	Notes:	Notes:	

Score:	#3 Engaged Listening		
Definition: Give full attention to the words, nuances, and the unspoken meaning of the client's communication; the coach is more deeply aware of the client by listening beyond what the client is able to articulate.	Effect: 1. The client feels understood and validated—not judged. 2. The client communicates more effortlessly and resourcefully.	Key Elements: 1. The coach focuses on what the client expresses. 2. The coach listens beyond what the client articulates.	Distinctions: Listen for v. Listen to; Being aware of v. Preempting; Eliciting v. Leading
Effective Behaviors The coach: 1. Is silent or uses nominal cues to give the client the opportunity to reflect or respond. 2. Notices nuances in the client's communications. 3. Confirms the client's communications, providing an opportunity for the client to review what he/she said.	Ineffective Behaviors The coach: 1. Interrupts or talks over the client. 2. Does not allow productive silence (such as consistently speaks as soon as the client finishes speaking). 3. Misses the client's deeper points in the communication. 4. Disregards something important. 5. Uses an approach that is generic and formulaic.	Measures 1. The client's tone and flow of ideas becomes more open and effortless. 2. The client has adequate time to process thoughts and discoveries. 3. The coach confirms the client's unspoken communication, as appropriate. 4. The client confirms the coach's observations of unspoken communication. 5. The coach uses silence at the right times and for an appropriate duration. 6. The coach does not lead the client in any particular direction.	
Notes:	Notes:	Notes:	

Score:	#4 Processing in the present		
<p>Definition: The coach is attentive to the client, processing information at the level of the mind, body, heart and/or spirit, as appropriate. The coach expands the client's awareness of how to experience thoughts and issues on these various levels, when and as appropriate.</p>	<p>Effect:</p> <ol style="list-style-type: none"> 1. The client is free to express and engage with present reality. 2. The client is unencumbered by past or future preoccupations or concerns. 3. The client benefits from coaching insight and support on all levels. 4. The coach is highly attuned to subtle communications from the client. 	<p>Key Elements:</p> <ol style="list-style-type: none"> 1. The coach has a simultaneous and holistic awareness of the client's communications at all levels. 2. The coach is able to discern whether the client is communicating from the past, present or future. 3. The coach allows the client the opportunity to process and clarify the coach's questions and comments. 4. The coach allows the client the opportunity to process his or her own thoughts and responses. 	<p>Distinctions:</p> <p>Responding from awareness v. Conditioned reactions; Here and now v. Past or future; Attuned v. Alert</p>
<p>Effective Behaviors</p> <p>The coach:</p> <ol style="list-style-type: none"> 1. Shares what he/she is noticing, realizing, or feeling when it could serve the client. 2. Remains open to the client's perspective. 3. Maintains connection while noticing themes and patterns. 4. Asks questions and offers observations at the different levels, as appropriate. 5. Provides moments of silence for the benefit of both the client and coach to check in for more subtle ways of knowing. 6. Checks in with the client about his or her thoughts, feelings and intuition. 7. Checks in with the client about what he/she is feeling in his or her body, if appropriate to that client. 8. Expands the client's awareness of the different levels. 9. Shares intuitions and theories with lightness. 10. Offers the client possible ways to explore his or her "inner knowing" and how to use the body as a source of wisdom and a touchstone for making decisions. 11. Interrupts to refocus the client when appropriate (for example, client is caught up in their story; client is talking about unrelated issues) 	<p>Ineffective Behaviors</p> <p>The coach:</p> <ol style="list-style-type: none"> 1. Does not engage with the client at the level at which the client needs coaching. 2. Shares something that obviously is not relevant or is counter-productive. 3. Pushes his/her own point of view or agenda. 4. Does not recognize or address counter productive behaviors when they occur during the coaching session. 	<p>Measures</p> <ol style="list-style-type: none"> 1. The coach demonstrates awareness of the client's expression on multiple levels, as appropriate. 2. The coach remains light and enjoys the coaching process. 3. The coach and client enjoy and value moments of quiet during the coaching conversation. 4. The coach is mindful of the client's agenda and needs. 5. The coach helps the client to determine and express his or her own point of view at different levels of mind, body, and spirit, as appropriate. 6. The coach shares his or her point of view without attempting to persuade the client to adopt that viewpoint. 7. The coach models for the client the value of expanding his or her levels of awareness as appropriate. 	
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Score:	#5 Expressing		
Definition: Expressing is the manner in which the coach communicates commitment, direction, intent, and ideas.	Effect: 1. The coaching interaction is enhanced with the client being at ease and trusting. 2. The client is open to understand and/or question any communication from the coach.	Key Elements: 1. Respect. 2. Attentiveness. 3. Client-focused. 4. Clarity. 5. Appropriateness.	Distinctions: Communication “for” the client v. “to” the client; Allowing the “how” of communication v. the “what” of communication (how the coach conveys his or her support and encouragement v. using words alone for expression).
Effective Behaviors The coach: 1. Maintains focus on and attention to the client. 2. Builds and maintains rapport through tailored communications. 3. Uses verbal and nonverbal skills. 4. Speaks mindfully, clearly and economically. 5. Speaks directly, while sensitive to the client’s mood and circumstance. 6. Invites the client’s input, self-disclosure and expression of feelings. 7. Uses pace and energy effectively.	Ineffective Behaviors The coach: 1. Is self-absorbed (trying too hard; focusing on self versus the client; not being fully present and engaged; interrupting inappropriately). 2. Uses a pace of expression that is inconsistent with the energy of the session (for example, rushing or delaying). 3. Is ineffectual in making a point (for example, too wordy; the client doesn’t understand vocabulary, references and metaphors; point not pertinent). 4. Communicates in a manner that is inauthentic or is incongruous with the client’s words or tone. 5. Has inappropriate verbal mannerisms.	Measures 1. The coach and the client exchange is free flowing and/or expansive. 2. The coach’s communication becomes a springboard for the client to more open discourse and positive result.	
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Score:	#6 Clarifying		
Definition: Reduce/eliminate confusion or uncertainty; increase understanding and the confidence of the client.	Effect: 1. The client and the coach move forward in a more directed way. 2. Increased possibilities. 3. Decreased uncertainty. 4. Uncovering the unknown.	Key Elements: 1. Identify the most important issue while respecting client's preferences and limitations. 2. No judgment by the coach, no leading toward a particular destination. 3. Identify key values and needs. 4. Facilitate alignment of purpose, vision and mission. 5. Identify blocks to progress.	Distinctions: Source v. Symptom; Simplicity v. Complexity; Discern v. Solve
Effective Behaviors The coach: 1. Makes or shares distinctions. 2. Asks "either/or" questions. 3. Connects to something the client already knows or has experienced. 4. Identifies patterns. 5. Asks open questions. 6. Makes statements that enhance the client's understanding. 7. Mirrors or paraphrases. 8. States what is perceived.	Ineffective Behaviors The coach: 1. Makes assumptions. 2. Is pulled into the client's chaos and confusion. 3. Asks leading questions. 4. Asks closed-ended questions. 5. Does not ask questions at all. 6. Does not address a topic the client is clearly avoiding or minimizing. 7. Misses or ignores what is most important.	Measures 1. The client's energy is increased. 2. The client's view of the situation has shifted to: a. improve focus. b. reduce the uncertainty or confusion. c. reveal the unknown. d. include new possibilities. 3. The client has increased self-awareness, or can see himself or herself from a new perspective. 4. The most important issue for the client is identified.	
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Score:	#7 Helping the client set and keep clear intentions		
Definition: Keeps the client focused and working towards intended goals.	Effect: 1. The client feels capable. 2. The client is clear about what he or she wants to achieve or transform. 3. The client is inspired by the possibilities. 4. The client moves forward purposefully.	Key Elements: 1. Inquiring into the client's intentions and goals. 2. Time spent on what is most important. 3. Clarifying direction of progress. 4. Periodically reviewing, revising, and/or celebrating the process and intentions.	Distinctions: Transform vs. Change
Effective Behaviors The coach: 1. Continuously clarifies what the client intends. 2. Perceives what matters to the client. 3. Asks questions which reveal the client's intentions. 4. Brings the client back to what is important. 5. Rephrases the client's intentions in a way that adds value. 6. Respects the client's goals and preferences. 7. Offers resources to enhance the client's ability to clarify intentions (including models, tools, books, assessments). 8. Perceives or enquires, and responds to, changing needs and desires of the client.	Ineffective Behaviors The coach: 1. Pushes the client towards stated goals when they are no longer relevant. 2. Moves forward while the intentions are not clear. 3. Needs the client to follow the coach's agenda or methodology. 4. Second-guesses the client. 5. Follows the client's tangents which detour from the stated goal.	Measures 1. The client is more excited about the future. 2. The client is more excited about the present. 3. The client agrees to take more responsibility. 4. The client has a realization that removes a mental obstacle. 5. The client is engaged and excited about new direction.	
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Score:	#8 Inviting possibility		
Definition: Creating an environment that allows ideas, options and opportunities to emerge.	Effect: <ol style="list-style-type: none"> 1. The coach enables expansion of thoughts and actions. 2. The client's awareness is expanded. 3. The coach helps client transcend barriers. 4. The client is willing to leave his/her comfort zone. 5. The client has more options. 	Key Elements: <ol style="list-style-type: none"> 1. Trust, openness, curiosity, courage, recognition of potential. 2. The coach and the client communicate through exploration and discovery. 3. Identify "internal" possibilities (e.g., personal greatness, higher purpose) and "external" possibilities (e.g., resources, memes). 4. Possibilities are generated by the coach, the client or a collaboration of the two. 	Distinctions: "Beginner's mind" vs. Imposing expertise; Creative vs. Prescriptive; Expansion vs. Resolution
Effective Behaviors The coach: <ol style="list-style-type: none"> 1. Uses appropriate tools and techniques to create the environment for expansion. 2. Draws on various scenarios, circumstances and cultures to expand the client's options. 3. Poses questions to enhance the process of discovery. 4. Minimizes effects of conditioned thinking. 5. Brainstorms with the client. 6. Helps the client see his/her possibilities from a larger perspective. 7. Is provocative when necessary to encourage the client's expansion. 8. Stays open to possibility, even when the client resists. 9. Is willing to let the unknown present itself. 10. Encourages the client to explore the most ambitious options. 	Ineffective Behaviors <ol style="list-style-type: none"> 1. The coach: Is attached to a particular framework or process. 2. Is seeking a particular outcome or answer. 3. Rushes to find a solution. 4. Accepts the client's perceived limitations. 5. Asks leading questions or too many questions. 6. Allows the client's "story" to constrain the exploration of possibility. 	Measures <ol style="list-style-type: none"> 1. The conversation enters new and potentially unrelated areas. 2. The client has an insight that takes him or her by surprise. 3. The client is receptive and recognizes expansion is possible. 4. The coach offers new possibilities. 5. The client offers new possibilities. 6. The client expresses enthusiasm regarding new possibilities. 	
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Score:	#9 Helping the client to create and use support systems and structures		
Definition: Helping the client identify and build the relationships, tools, systems and structures he or she needs to advance and sustain progress.	Effect: The client is confident and secure in moving forward, knowing that resources are available or can be created.	Key Elements: 1. The coach suggests possible support systems and structures appropriate to the client's needs. 2. The coach prompts the client to identify and list support systems and structures the client has but is not utilizing effectively. 3. The coach assists the client to list areas in which the client feels a need for support and structure. 4. The client values the need for appropriate support systems.	Distinctions: Supportive structures vs. Constraining process; Complementary vs. Duplication; Enhancing vs. Overwhelming
Effective Behaviors The coach: 1. Suggests relevant resources and references. 2. Helps identify systems which may be needed and elicits feedback on the client's investigation, assessment and possible implementation of systems and structures. 3. Is responsive to suggestions for supportive and complementary systems and structures. 4. Actively seeks to identify ways of expanding capability through systems and structures. 5. Supports the client to address sustainability of systems and structures. 6. Isn't attached to the client's response to any resource, system, or structure.	Ineffective Behaviors The coach: 1. Recommends resources, structures or systems without first identifying the individual client's needs. 2. Recommends resources which may be inappropriate—for financial, cultural, personality or educational reasons—for the particular client. 3. Seeks to impose on the client the coach's own preferred structures or systems. 4. Overrides suggestions by the client as to possibly supportive systems or structures. 5. Doesn't offer or encourage support systems and structures when appropriate for the client. 6. Doesn't actively support the client in using the identified support systems and structures. 7. Doesn't address the sustainability of the identified support systems and structures.	Measures 1. The coach is creative in helping the client to generate support systems and structures without attachment to whether the client adopts particular ideas or not. 2. The client recognizes resources not previously identified. 3. The client expresses appreciation of the value of utilizing existing resources or creating new ones. 4. The client embraces responsibility for using, finding or creating resources. 5. The client acknowledges that this new appreciation or sense of responsibility is empowering. 6. The coach addresses the sustainability of the support systems and structures.	
Notes:	Notes:	Notes:	