

ILLCP 95 - Creating and Adjusting a Life Plan

This class teaches prospective coaches how to guide the client's effort to create a life plan; providing coaching tips for moving them steadily from inspiration to manifestation of their plan.

Time to Dream (YOUR TRUE LIFE GOALS)

This is another valuable tool to have because some of your clients may simply be living in survival mode and their life goals are centered on the thought of simply making it from one day to the next.

- Offer the **Time to Dream** tool.
- Your client(s) most likely will be afraid to start. Starting is the hardest point. This is why a good environment of trust is important.
- What you have learned about your client, through the use of their profile, will help you communicate with inspired leading questions.
- Use discernment as you ask questions and listen.
- It is important to keep your client "locked into" their objective; this will help the client's discovery process. As you proceed, their objective should emerge and become clearer.
- If you are working with youth and young adults, find creative ways like social media, photos, TV shows, movies, and other media forms that provide imagery to best utilize this tool.
- It is important to help the client discover what they are passionate about – what motivates them. This will help define the true objective(s). For example, if your client is a parent and wants to do a better job of parenting, it would be your goal to help the client find a productive vision and pathway for this.

Time to Dream Tool

- Make a list of as many things that you can think of that you desire for your life i.e. Singing, business, teaching, designing etc. (What did you always want to do with your life?)

(The ability to accomplish them is not important right now, we are in discovery mode at this time.)

- Now rate your list from 1 to (whatever) in the order of most important to least important to you.
- Take time to analyze the priority items on their list using your **Drawing Forth Personal Vision exercise** that was completed when you first started working with your Life Coach.

Time to Dream List:

This is an example of a Life Goals Planning exercise. There are many types available, but this is a scaled-down, simple version that can be employed.



What Are Your GOALS?

Your Name: _____ **Date:** _____

Identify *up to* 3 primary areas that you want to focus on with your Life CARE Coach. The goals should be challenging (so you remain interested) and achievable (realistic). To help you, try answering the question:

"How would you like yourself or your life to be different after life coaching?"

For each focus area write a simple heading and try to describe a 'measurable' result – how you will know you have succeeded or are on track. For example:

Heading: BE MORE PRODUCTIVE
Measurable Results: I have a system to follow up on calls and letters, I'm on time (or early) for my business meetings, I get 90% of my tasks accomplished, I completed project x.

1.

Measurable Result:

2.

Measurable Result:

3.

Measurable Result:

Secondary Goals

These secondary goals are included to give you additional value from coaching.

Notes for setting Secondary Goals:

1. These goals are a secondary focus of the coaching. They are usually small things that may have been 'nagging' at you for some time and will be things you work on by yourself during the coaching period. It may be a good opportunity to rid yourself of mental and physical clutter.

Some examples for you: Clean out the hall closet, update my resume or compliment my partner once a day until it becomes a habit.

2. These goals must be distinct from the primary goals.
3. You must be able to state the goal in one sentence.
4. The goals need to be measurable in some way, with the measure as part of the goal.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

The Life Coach must have the ability to examine the progress, or lack of progress of a client's plan, and make the necessary adjustments that help determine the outcome of their efforts.

In this process it is important for the client to stay focused on their plan of action and stay motivated to continue forward in what they have created.

We recommend that you review the **Drawing Forth Personal Vision** Tool (from page 43), and then work through the **Time to Dream Tool** (page 55).

Finally, follow the **Achieving Goals Life Plan Action Steps** (pp. 59-61) that will get your client thinking about the steps they need to take in order to reach their goals.

Throughout this course we have been walking you through what the American Association of Christian Counselors refer to as:

The Seven Essential Skills for Life Coaching

So far we have shown you how to

- Build a trusting relationship with the client – which is often viewed as the most important skill of a life coach.
- Establish a clear coach/ agreement – being specific about the contract, showing how coaching differs from therapy, and the limits of confidentiality.
- Communicate effectively, which involves active listening. This means that about 80% of your sessions should be the client talking.
- Create awareness in the client – which is done by you being present in the sessions and helping the client be self-aware.
- Posing powerful questions – which means you're asking questions that cause your client to stop and think; and you give them the opportunity to gain new insight and perspective.

And now we come to the last two essential skills and they are:

- **Designing action steps** – which is to help the client brainstorm opportunities, possibilities and their next steps.
- **Managing their progress** – which means keeping the client accountable. You're there to help them follow through on what they said they would do, and how they said they would do it.

Depending upon the client, the plan might be formulated and worked out from a blank sheet of paper or the latest Time Management/ Organizing software or App. We believe it's best to have the client take the initiative at this point. You find that there are hundreds of action plan templates out there and all follow basically the same format:

- Set Goals
- Create a list of action steps
- Set a time line (weekly, monthly, daily)
- Identify potential barriers
- Identify resources
- Monitor outcomes and progress (what were the desired outcomes and what was the actual outcome)
- Reevaluate, adjust, reset goals and keep moving forward

It's important for you to establish an accountability follow up schedule. You should work in agreement with the client on how often you will meet after they have established their plan. (Weekly, bi-weekly, monthly, etc.)

The following pages are some tips that you can consider as you help someone set their goals and work out their plan.

ACHEIVING GOALS LIFE PLAN (Action Steps)

TIP #1: make a true assessment, documenting your client's answers.

- * What are your client's expectations?
- * What is their measuring stick so that the results can be measured?
- * Is your client able to communicate their desires?
- * Help your client define their objectives.

Four thoughts to explore:

1. What is the goal?
2. What are the obstacles in reaching the goal?
3. How do I adjust my thinking in order to overcome the obstacles?
4. How do I adjust my behavior in order to overcome the obstacles?

- * What is the impact of my goal on my current job, community, family etc.?

Ask questions or give homework like:

- *What kind of training do you think you'll need to do that?
- *When are you going to start looking into the local community college?
- *Write down what you do each day of the week.
- *Write down what you *should be* doing each day of the week.

Be honest with where you are in the plan. Make a true assessment.

TIP #2: Work through the following points with your client, when making adjustments to their plan.

MAKING ADJUSTMENTS

- * Encourage creative thinking regarding what the client's next step is.
- *Keep the steps simple so that they can be done.
- * If something IS working, don't feel you have to adjust or improve it right away. Give it time. Adjustments and tweaks will come.
- * Continue to work hard to adjust and change our old thoughts and ways of doing something.

TIP #3: Apply the SMART* tool (below) to help your client form a more refined action plan.

MOVING FORWARD AND TAKING ACTION

Our vision of this is a large part of what keeps us motivated to move forward and take action.

Your actions should be:

S – Specific, Significant and Stretching

M – Measurable, Meaningful

A – Achievable, Attainable, Agreement

R – Realistic, Relevant, Rewarding

T – Timely, Tangible, Traceable

Using the SMART* ideas can help you move forward in a productive way.
BE SMART!

* The November 1981 issue of Management Review contained a paper by George T. Doran called, "There's a S.M.A.R.T. way to write management's goals and objectives."

TIP #4: As you continue to meet with your client regarding their life plan, use the following to motivate them.

MOTIVATING YOUR CLIENT

In motivating our client we have to put ourselves aside. It is important to think about the "state of being" our client is in. Is it time to encourage them? Staying motivated is important to a successful outcome.

SIMPLE MOTIVATIONAL STEPS

1. Have a good connection with your client – Refer back to their profile.
2. Know your clients true purpose and desire.
3. Help them choose small steps that they can accomplish.
4. Remind the client that the process is necessary.
5. All activities need to be practical and applicable to their goals.
6. Give positive feedback.

FEEDBACK GUIDELINES

1. WHAT (be specific about behavior and performance)
2. WHY (to reinforce and redirect)
3. WHEN (as soon as possible, when needed)
4. HOW (clear communication, be specific and encouraging)

STAYING MOTIVATED AS A CARE-READY LIFE COACH

As a CARE-Ready Life Coach, there are times when you need to keep yourself motivated along with the people you are helping. Things are sometimes more difficult or stressful than you anticipated. Use these guidelines to help yourself stay motivated:

1. Ask yourself, "*What is my purpose?*"
2. Remind yourself of why you desired to become a CARE-Ready Life Coach.
3. What are you learning about yourself as you walk through your client's process?
4. Review and rehearse your successful thinking or life plan.
5. Take time for self-care. You have an ethical responsibility to take care of yourself, so you can be your best for your clients.
6. Review the Emotional Intelligence Self-Motivation Tool.
See the exercise that you downloaded
7. Reference the CARE-Ready Handbook: **Responding with CARE**
8. Join the online coaching network (community) for more tips, tools and ideas.