


Monday, February 11, 2019
NAPO Virtual Chapter Presentation

**Is Developing Client Awareness
Your Job?**



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Our Agenda

I. Introduction
II. Client Awareness Agreement
III. How to Develop Client Awareness
IV. Coaching Resources

Questions? Yes!

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I. Introduction

- Clients' *Opening for Change*
- Levels of Client Awareness
- Coaching Communication
- Coaching Process

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**IS Developing Client Awareness
Your Job?**

Yes!

Because there's an
Opening for Change

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I. Introduction
Levels of Client Awareness

Surfacing Client Awareness	A by-product of the intake and assessment conversations -- to determine project design/scope
Deepening Client Awareness	By asking for more information (examples, strengths, pros and cons) By collaborating (design) and tracking (application)
Partnering to Develop Client Awareness	Through an agreement to include better client awareness and behavior change as a focus and goal of the project

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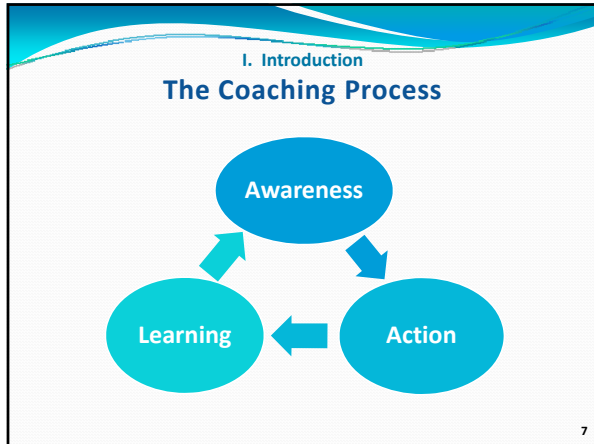
I. Introduction
Coaching Communication

Coaching bundles communication skills into a rich conversational process

... and a uniquely designed coach-client collaboration

... that effectively supports desired change and growth.

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- ### II. Client Awareness Agreement
- Explore the Opening for Change
 - Discuss the Benefits of Greater Self-Awareness
 - Describe the Awareness Development Process
 - Confirm the Awareness Agreement
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- II. Client Awareness Agreement
- ### Explore the *Opening for Change*
- #### Ask Your Client
- About their goals for this project they have hired you to complete with them
 - To describe how [the finished project] will work, look, feel, be maintained -- and make them feel while using it
 - How the new start created by this organizing/productivity project might be an opportunity for personal growth
 - What behavioral or other personal changes might be a part of this project
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II. Client Awareness Agreement

Benefits of Greater Client Awareness

- The project result will be a better fit -- easier and more pleasing to use and maintain, longer lasting
- Client will know her own preferences and strengths -- and be better able to
 - **Work effectively & productively** ❖ **Delegate** ❖
 - **Ask for what s/he needs** ❖ **Collaborate**
- Client will continue to build new awareness throughout her life – and adapt to change

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II. Client Awareness Agreement

Describe the Awareness Dev. Process

- Time spent at every meeting to reflect on strengths, experience and behaviors – and to track growing awareness
- Self-observation
- Co-created experiments (fieldwork)

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II. Client Awareness Agreement

Confirm the Awareness Agreement

Invite your client to include self-awareness as part of the organizing/productivity project

- Request client input**
*Having described this to you, what do you think?
How might we adapt these ideas to suit you?*
- Acknowledge the time commitment**
- Explain Requests (yes, no, maybe)**
- Confirm the Awareness Agreement**

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III. How to Develop Client Awareness

- **Model Curiosity – and really ‘SEE’ your Client as the Expert**
- **Ask about and *Listen for* ...**
- **Encourage Client Sharing**
- **Pause to Reflect and Learn**
- **Fieldwork**

Sample Language

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III. How to Develop Client Awareness

Model Curiosity

Encourage your client to become the ***Curious Expert*** on his or her self.

NCRW = Naturally Creative, Resourceful and Whole

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III. How to Develop Client Awareness

Ask About and *Listen For*...

- What s/he knows already (what works, what doesn't -- what s/he understands about her/himself already)
- How he or she learns best
- Goals, motivation, values and passions
- Past experiences, preferences, choices
- Strengths and strategies (modalities, circumstances)
- Habits to keep and get rid of
- Health conditions and impactful self-care strategies
- Patterns, beliefs, perspectives, self-talk, "shoulds"
- Supportive environments and people
- What's unsaid

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III. How to Develop Client Awareness

Encourage Client Sharing

without making assumptions or offering your own insights

- Go deeper -- ask for details or examples, ask about colorful word choices, ask what makes positive perspectives or choices possible
- Request (and get) permission before ...
 - Sharing your thoughts or information or
 - Asking possibly sensitive questions
- If you share, follow-up by finding out what seems most relevant or true to them.

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III. How to Develop Client Awareness

Pause Routinely to Reflect and Learn

- Consistently make the time to learn ... at the beginning and/or end of each session -- and at each stage of the project
- Track established, growing and shifting awareness
- Identify and revisit awareness goals, including agreement and process
- Capture learning from 'fieldwork' experiments

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III. How to Develop Client Awareness

Fieldwork

Co-create client 'fieldwork' experiments

- Client self-observation between sessions -- energy spikes and dips; self-care impacts; sleep patterns
- Interrupt self-criticism with positive self-talk
- Test drive a new system or habit
- Suggest a Values & Needs Exercise
- Learn more about [ADHD]

Learn from every fieldwork effort, successful or not ❖ Continue to demonstrate and encourage curiosity ❖ Expect shifts -- weave new awareness into previous understandings without attachment

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III. How to Develop Client Awareness
Sample Language, 1

Tell me more.
What gives you energy?
What do you do well?
Did you ever have [a calendar] that worked for you?
Tell me what being super-productive feels like?
Let's identify your modality strengths.
What values are most important to you?

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III. How to Develop Client Awareness
Sample Language, 2

What do you know about working with your [ADD]?
What impact does [health condition] have on your organizing efforts?
How could we accommodate that?
How might you use that tendency as a strength?
You said you thought that a good night's sleep was essential to accomplish [this task]. So how could you schedule this next experiment to test that?
What frame of mind will best support you in this effort?

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III. How to Develop Client Awareness
Sample Language, 3

Tell me how that worked?
What support would allow you to do it the way you want?
How might you use what you've learned here?
What resources are you developing?
Why do you think that went so well?
What got in the way?
How could you set up the next effort to be easier?

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IV. COACHING RESOURCES
Consider Coach Training for Professional Development

Coaching Essentials
An 8-week tele-course teaching basic coaching skills and strategies

Foundation Coach Training Program
5 telecourses which lead to graduation – 27 weeks of intensive training (with generous holiday and conferences breaks)

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IV. COACHING RESOURCES
Consider Coach Training for Professional Development

Five Coach Credentialing Programs

- ★ *Certified Organizer Coach*
- ★ *Certified ADHD Organizer Coach*
- ★ *Certified Organizer Life Coach*
- ★ *Certified Productivity Leadership Coach*
- ★ *Professional Certified Organizer Coach*



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IV. COACHING RESOURCES

www.CoachApproachforOrganizers.com

- Learn about our courses, program, costs and trainers
- Join the e-newsletter list

Request

- Values & Needs Exercise*
- Coaching Resources*
- 1-on-1 talk on coach training, coaching + organizing, or coaching + productivity consulting



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