

Ep #191: How to Create Effective Coaching Processes: Avoid These 5 Mistakes



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With Your Host

Lindsay Dotzlaf

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Hey, this is Lindsay Dotzlaf and you are listening to episode 191.

To really compete in the coaching industry, you have to be great at coaching. That's why every week, I will be answering your questions, sharing my stories, and offering tips and advice so you can be the best at what you do. Let's get to work.

Hey Coach, my name's Megan, one of Lindsay's podcast producers. This week we have a special treat for you because Lindsay's asked us to re-share an episode that many of you found incredibly helpful. It's all about creating your own coaching process and the common mistakes that Lindsay sees coaches make when they do this. Whether you have hundreds of clients in a group or you're a brand-new coach, these five mistakes can happen to anyone. So tune in, take notes, and enjoy!

Hey Coach, welcome to the podcast. Today, we are going to talk about something I love to call process specificity. Say that three times fast. And this is what I mean by that, in my mastermind, Coaching Masters, one of the things that I teach my clients is how to create their own coaching process. Or how to refine and simplify a process that they already have.

So obviously, while I do that in my mastermind, I'm not going to take you through step by step how we do it. But what I do want to share with you today is the top five mistakes that I see coaches make when they are creating their process.

And this is for you, whether you have 100 clients in groups, or a program, or if you're a brand new coach. Even if right now you're like, "Oh no, I don't even know what my process is. I'm a brand new coach, I don't think I have a process." One thing that I like to teach in my mastermind is that every coach has a process, even if it's not a super specific one, right?

So for those of you that are just starting out and you don't have a very specific process, I still like you to get specific in your mind what your process

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is, for lots of reasons. But the top ones are because it makes it so much easier to explain to clients what you do, how you create results, and how you work with them.

And it also creates safety for your clients, right? When you can just tell your clients like, “Oh, that’s no problem. It’s simple, here are the steps.” Even if the steps are we set goals, we create a plan to work towards the goals, we evaluate along the way, and we move in the direction of the goals, right? Like that could be your whole process.

And one of the things that I tell my students is I just never want them to leave the mastermind without being so clear on their specific process. So, now I’m just going to walk you through the five things that I see come up, probably the most often when I’m teaching this.

One of the principles that I teach when creating a process is to make it as simple as possible. And a lot of coaches come to me, especially if they’ve been a coach for a while or if they have a program or they have a group program. And they have a very complicated process, it has lots of steps and there’s usually some thoughts there that are like I have to have a lot of steps so my clients will take me seriously. It proves that I know what I’m doing. Just thoughts like that.

And what I would offer, just imagine going to hire a coach. Would you rather have a coach that says to you, “Great, we can definitely work towards those goals. I just want to let you know here’s what we’re going to do, it’s a 32 step process. And it’s okay, we’ll work through it together.”

Or would you rather have a coach that says, “Yeah, we can definitely work towards those goals. This is exactly what I do with my clients, it’s so simple. Here are the three steps.” Or four steps or five steps or whatever. I’m not saying it has to be a three step process, but I do love it to be five steps or less.

And one reason I think that a lot of coaches love to complicate their process and not make it specific, or sometimes make it too specific and too

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complicated is because they're trying to put every single little detailed step in along the way. So sometimes when I'm coaching on this, sometimes we do remove steps from the process. But sometimes we don't actually remove them, we just take them out of how they talk about the process.

So I'll give you an example that's not really related to coaching. My daughter rides horses, she loves horses, she loves all animals. For those of you that are in my mastermind, you know this because she's the one who loves cheetah print and cheetah everything. Really, anything big cat. So we've had conversations about what the different spots are. I don't know why, but it's come up in the mastermind.

So she rides horses and so the first time, I have never been a horse rider and the first time we went to a lesson, just imagine if we had walked up and instead of— Like, what they did say was, "Okay, here's how it's going to go, we're going to teach her how to take care of the horse, how to love the horse, and then how to get the horse ready to ride, and then the basics of riding. And then we can start working on these specific skills that she wants to learn." Okay, that's their process, right? It's super simple.

Now imagine what if they had said, "Well, okay, the first thing we do is we show her where the bucket is in the back with all of the brushes. And then we get that out, we show her which brush to use to get all the dirt off before we put the saddle on, because the horse can't have dirt because then it'll rub and it's a whole thing, and then they'll get sores.

And then we have to pick out the hooves, and you do that with this very specific tool. And we show her how to do that and you have to start with the front one, and then do the other one, and then do the back one." Right? Imagine if that is how they told us about horseback riding lessons, it would have been like, oh my gosh, that sounds like a lot. And even she might have said, like, what?

Now, of course, she does all these things, right? They are all things that she has had to learn over the six months or whatever that she's been riding

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horses. She's had to learn each of these steps. But they didn't tell us, like no one tells you that ahead of time, right? Because all of those little details don't matter.

Now, of course, the trainer who was there, the amazing person who takes care of all the horses, of course she knows all the steps. But she didn't have to tell me that ahead of time to let me know how it was going to work for my daughter, Harper, to learn how to ride horses.

This is what some of you are doing with your coaching process, right? You think it's amazing that you know every single step and so you're trying to tell the client every single step, instead of making it sound super easy for the client.

Your client doesn't want it to be complicated. You can probably sell them on it, like sell them on why it's complicated. And I'm sure that, you know, you can definitely sell them on being on board with a complicated process. But if you're like, "Oh no, this is me," I would just consider how can you un-complicate it? How can you make it simple?

The second mistake I see a lot of coaches make is they think that they need to teach their clients every single coaching tool they've ever learned so that their clients can coach themselves and use all the tools in between calls. Some of you might be upset with me for this, but I just want to offer that you actually don't have to teach your clients to coach themselves.

Now, depending on your niche, I'm not saying don't. Sometimes it does make a lot of sense. And some clients, especially if you work with them over long periods of time, they will want to know, right? Like, oh, what is this tool that you're using? Can you teach me how to do it?

This is one of the number one complaints, probably, that I get from some of my students, is like my clients aren't doing the coaching work in between calls. And I always say, why do they have to? Why not just let them come to calls and you coach them? You do the coaching work, right? Like you walk them through the tools.

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Of course, again, there are definitely exceptions for this, you know, to this rule. And there are some niches where it does make sense. One thing that, and this kind of goes into the next point, one thing that ends up happening when you think that you need to just teach your clients all of the tools that you know, especially for those of you that have had lots of training and now you're teaching your clients like 20 tools.

I like to keep it as simple as possible. Your clients do not want 20 tools, they want the one or two that work for them. Or three or four or whatever. But they don't need to know 20 tools, they just don't.

And this does lead into the next thing, is that a lot of coaches are thinking when they have a specific process, this means they're going to be doing a lot more teaching. Now, for some of you this might be true because you might be coming into coaching kind of doing some consulting/coaching. I've interviewed some people here on the podcast who do this type of thing.

So if you think about the client, Aimee LaLiberte, who I interviewed. She helps a client, she's like their CFO. She helps clients do their books and then she also coaches them. So all of that process, the actual finance piece of it, like there's probably going to be some teaching in there, right? Some teaching them how to manage their money, how to, you know, whatever it is that she teaches, I'm not going to pretend like I know and make it up. And then there's the coaching part.

But some of you are thinking even though you don't do that, you don't have a specific thing that you necessarily are teaching your clients, you think about like I need to have a process, you think that means you need to have tons of teaching. That's not true.

The next mistake, the fourth mistake I see a lot of clients make when it comes to figuring out what their process is, they try to make up a specific process when they're a newer coach and they haven't really coached many clients on whatever the thing is.

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So let's say you decide you want to be a business coach and you haven't made a ton of money yourself as a coach. And you think, okay, well, if I'm going to be a business coach, I need to have a process, right? Like a business process, I need to teach my clients how to make money. So I'm going to just make up a process that I think will work, even though I haven't used it myself, or I haven't coached a bunch of clients through it to know.

Instead of just saying, I'm a mindset coach and I coach business owners, which is really different, right? Or I'm just a life coach for business owners, or I'm a mindset coach for business owners. Which is basically saying I'm not going to give you every single piece of business strategy, I'm just going to coach your mind on all the things that come up.

And the fifth mistake that I see a lot of coaches make, and this is especially, I was going to say this is especially with newer coaches, but I'm going to say it's also a lot of times when coaches make changes to how they offer their coaching. So maybe go from one on one to group coaching, or group coaching to a program. They might have a lot of drama about their process, and instead of solving it, they just ignore it. And they just keep pushing it to the side.

So this might look like, let's say you're a brand new coach. And you heard me say the word process and you were like, "Oh no, I don't have one, I need to have one. What does that mean? I need 20 steps, I need to figure it out." First, this isn't true, we've already covered this. But also, there's no reason to have drama about it. You could decide right now what your process is in three steps, and just move on from that.

Now, of course, in my mastermind I'm working with a lot of coaches who do have a more specific process with specific things that they teach their clients a lot of the time. But even when I see coaches change into group coaching, or into creating a program, one thing I always recommend is like, okay, let's just get it out, like what is the rough process? Let's start there, right?

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Let's just get it out of your head and onto the paper because the tendency to just ignore that, to just push it to the side, and like it's okay, I'll figure it out later, can create so much drama down the road that I just see so many coaches just ignore, ignore, ignore, like, push off, push off, until it becomes an actual problem. And then they're like, "Oh my gosh, I have all these people enrolled in this thing and I don't know what my process is.

And it just puts you in a situation of trying to figure it out from a place of scarcity, instead of trying to figure it out like, okay, I know what the process is, let's just get it out of my head, let's write it down, and then go from there.

And actually, I'm going to go ahead and add another one on, because I just thought of this as I was talking about it. Another mistake I see coaches make a lot when it comes to creating a process, is that they go into it thinking this has to be perfect from the beginning. So I have to create this process that I'm going to walk all my clients through and it can't change and I have to nail it from the start.

So they like stress over it and they put so much thought into it. Instead of being flexible and saying okay, especially when you have one on one clients, because that coaching can be a lot more forgiving, right? Like your process might vary slightly from client to client.

And instead of going into it and saying like, "Okay, here's my very general, very broad process," and then allowing yourself to refine it as you go. I just see a lot of coaches spin in confusion and overwhelm around this topic, only because they're thinking it has to be perfect, I can never change it. Which of course isn't true, right?

I can't tell you how many times I have changed my process. And a lot of times the kind of evolution of a coaching business and of your process is in the beginning you probably don't have a solid process, right? It might be, and this is where I would encourage you to even then decide what it is, but it might just be like what I said earlier, right? Clients just come to calls, we

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set goals in the beginning, they just come to calls and get coached, we evaluate along the way, and that's the process.

And then as you coach more and more clients, your process is going to become more defined, it's going to become more clear. Even if you're a general life coach, you can still have a process. It can be very general, obviously, because if you're coaching on everything. But it doesn't have to be super defined right from the beginning.

And then as you keep going and as you create groups, this is where it becomes a lot more important to know what your process is, because you kind of want everyone on the same page, right? So if you don't do this work before you go into group coaching, it will be a little more confusing to run a group.

It'll be a little more confusing to sell a group, because the process is, you know, this is where, like with one on one, everybody can be doing the same process, but at their own pace and in different ways, where you are really working on it and refining it. But then when you move into a group, you kind of want everyone working the same process together. And then that becomes even more, more so, more important, the more clients you have.

So if you create something like a program or a membership, right? The more clear you are about your process, the simple steps of the process, the easier it's going to be to sell, the easier it's going to be to talk about it, and the easier it's going to be to deliver, right? Because you're clear, the clients are clear, everyone is on the same page and knows exactly what's going on.

So I hope this helps for any of you that are just super stressed about your coaching process. These are the top mistakes that I see coaches making. And, of course, this is something that we work on in Coaching Masters, which will be enrolling again in the next couple months. I hope to see you there. Bye.

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Thanks for listening to this episode of *Mastering Coaching Skills*. If you want to learn more about my work, come visit me at lindsaydotzlafoaching.com. That's Lindsay with an A, D-O-T-Z-L-A-F.com. See you next week.