

Ep #206: The Power of Regular Business Audits



Full Episode Transcript

With Your Host

Lindsay Dotzlaf

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Hey, this is Lindsay Dotzlaf and you are listening to *Mastering Coaching Skills* episode 206.

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, I am so happy you're here today. Before we get started on today's episode I have a few announcements and some housekeeping.

First of all, if you have been for a while, I've gotten a few emails and some messages from some of you telling me, just thanking me for this podcast, thanking me for talking about coaching skills and how to be the best coaches for our clients. And if that's you, if that's how you feel about this podcast, I invite you to leave me a rating.

I would love it. I read all of them. I take them very seriously. I really feel so inspired when I read, like, this has been so helpful, I've listened since episode 1, or whatever it is that they say. I really love reading them. You have no idea, they really fill me up and light me up. So if you feel so compelled, do that today. I would be so grateful.

And a couple of announcements. So if you've been in my world for a while you might know that the last couple of years I've done something called Coach Week, which is a week of free workshops and content and learning around coaching, around coaching skills, around how to be the best coach for your clients. And we're doing it again this year.

It usually falls in October and this year is no different, although it will be a little bit later than usual. So I want to announce the dates. We don't have a link yet, we will get it to you as soon as we have it. It will be in the show notes and in all the places. But for now, just go ahead and mark your calendar if you're listening in real time, in October of 2024. The dates for the third annual Coach Week are October 28th till November 1st. So that very last week of October.

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And I cannot wait to see you there. It's truly one of my favorite things I do every year. There are always hundreds of coaches that join and we're doing a couple different things this year that are still kind of in the works. But I will tease one thing. We are planning a bit of an expanded experience. So there will still be the free option and then there will be an option to tap into some additional resources for those of you that really want to commit to the week, get it all in, you know, show up live, like do the whole thing. And there will be some experiences for you that will be fun.

Also, if you're listening, if you're a member already of The Coach Lab, Coach Week is always free for you. You always get an invite. And as you know, as you probably know, you've probably seen in your portal, all of the replays always are kept in The Coach Lab client portal. So you have access to all the previous ones. And that will be no different this year, you will have access to all the things.

So I hope to see you all there. I'm getting really pumped. I'm having more fun this year than I ever have creating content for it and really thinking through what the pieces are that I want to teach.

And then the third thing is there are a few spots still remaining in the Reimagine Mastermind. So again, this is only if you're listening in real time, because we literally start next week from when this podcast comes out. And I guess I should say there are a few spots left at the time I'm recording this. There's a chance that by the time this comes out, there won't be.

But if you have been listening, or if you've been seeing the marketing for it, and it feels like you're drawn to it or something that you might be interested in, now's the time. We're going to start soon and then the chance will be over. But if you think it's for you, but you're just not quite sure, I have opened up some time on my calendar to do some chats about that.

So feel free to message me to let me know, we can have a chat about what you have, like the specific things you have going on in your business and if working through those would be a great fit for the mastermind. And as always, I'll be super honest with you. I want it to be, if it is a decision you

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make, I do not take that lightly. I want it to be a place that really makes sense for where you are in your coaching journey.

All right, so that actually leads a little bit into what I want to talk about today, which is convincing you that audits and evaluations are super sexy. Okay. So I know this is a funny way to say it, but there's a reason I'm saying it like that. And I'll just give you a quick story of how this came about.

So as you know, if you listened to last week's episode, I have recently been in Italy. And it was honestly one of the most amazing vacations I've ever been on. Truly, it was incredible. And there was a lot of self-awareness that happened, a lot of learning, a lot of lessons in it for me that I will be sharing in a future episode.

But today, this episode is actually inspired by one super brief, and by super brief I mean like a two minute long conversation that happened by the pool on Ischia, which is an island off of the coast of Italy, which was quite incredible and so beautiful. And I didn't work much while I was in Italy. I did that intentionally.

I really felt like I needed that kind of mental break, which I encourage, you've maybe heard me talk about this before, I encourage a lot of my clients to be sure that that's a thing that you are doing. That you're giving yourself that mental break from your business and just from, you know, obsessively thinking about for some of you, and for me sometimes, totally get it, obsessively thinking about your business and your clients and the coaching and all of the things, right?

Like, it's really important to just have that time where you intentionally shut that off. And sometimes what that will create and why it's so important, and what I found, is when I do that, some things will just bubble up naturally. And it's really interesting to see what those are.

So even though we weren't working much, it's funny, a lot of you, I've had some conversations with some of you and you've said, oh my gosh, I can't imagine being there. There were five coaches, you must have just talked

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about your business the whole time. And I was like, actually, no, not much. I'm going to say maybe about 1 to 2% of the time.

Now, this might be different depending on the five people. We weren't all five together the entire time, so I'm sure there were conversations happening that I wasn't involved in. But for me, I'm going to say about 1 to 2% of the time, somewhere around there.

So this conversation that happened was so brief. So we're sitting at the pool. And my friend Catherine Morrison, who is an incredible coach, looks at me and says, tell me about your new offer. I forget what she said, like I saw your marketing, or I heard you talk about it on the podcast or something. She said, it sounds so intriguing. Tell me about it.

And I said, and this just quickly slipped out of my mouth. And I said, well, mostly, I forget exactly how I said it. But the gist of it was, so we start with a business audit. Then I said immediately, I mean, I know the audit isn't very sexy, so I need to kind of rebrand it. But really, that's what it is. It's for the person who hasn't really taken the time to dig in and say, let me look at each part of my business and decide what's going really well, what's not going well, and what I love, what's working for me, what isn't working for me.

And she looked at me and said, are you kidding me? I think audits are so sexy. And this was one of those moments where just in an instance, a lot of you have probably, as a coach, had this experience, or maybe your clients have had this experience, hopefully. It just took her saying those words. Like, truly, that was almost the end of that part of the conversation. I wasn't like, oh, tell me why you think that or say more.

Nothing like that happened. It just took her saying that and then honestly, we moved on and talked about other things. And it planted this seed in my mind that I thought about a lot throughout the rest of the trip. And when I say, when I said earlier intentionally taking that time and space and just kind of seeing what bubbles up, this was one of the things that kept coming

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up for me. And that I actually did take some notes on the long, long journey home from Italy to Indiana.

And what I realized is I actually completely agree with her. And not only do I agree, but most of the programs and masterminds and group offers that I have had ever since moving from one on one into a group model have literally been built on the backbone of audits and evaluations and really understanding the importance of them.

And you've heard me talk about this before if you've listened to the episodes where I talk about evaluations, about how it's one of the number one assets I have used over the years to grow my business, to think about my coaching, to be a better coach. To just do all of the things, all of the goals that most of us have as coaches, this has been one of my number one assets.

So I know, especially in the US, why the word audit might not sound the sexiest, because I think a lot of us link it to a government agency coming in and saying, let me look at your taxes, are you paying what you're supposed to be paying? And it just is a bit, from what I've heard, I've not experienced this up until this point, but it can be a bit of a time consuming thing occasionally on your end, especially if you don't have all the documentation and all the things that you need.

So that's an aside, right? But I do think that that is a lot of times why just the word in general audit for me is like, oh, that's not a very sexy word. But just hearing her offer, "Actually, I think that's so sexy," it immediately shifted something in me. And it really had me examining all of the offers that I've had.

So The Coach Lab, which is currently available, inside there the backbone of what I teach is here are essential coaching skills that every coach should know. And then the way to use those or the process of working through The Coach Lab is to learn the skills, to practice them in your coaching, to do the coaching, and then evaluate your coaching. And I'm using the word evaluate and audit kind of interchangeably in this episode.

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So you evaluate your coaching, and with that evaluation, you see what are you loving? What feels great? What's helping your client get results? And what isn't? And then most importantly, how do you move forward? So it's doing all of the things that I think are the most important thing about coaching, or about self-coaching or self-awareness is, one, it's creating awareness, it's having you really look at it, right? All the things that you might be thinking, oh, I don't want to see it. Or this is going to take too much time, which I'll get into all these in just a second.

But it's having you look at the things that maybe you don't want to see, or maybe it's going to bring up some thoughts, especially if you're like things aren't working, or they're not going as well as I want them to go. It's going to bring those up, and you're going to see them. But the amazing part about seeing them, and the amazing part about doing an evaluation in the way I teach it, is you also are creating an exact roadmap for how to move forward, how to be better, how to improve, how to change the thing that isn't working. So we do that in The Coach Lab.

Then, I have also had the Advanced Certification in Coaching Mastery. One of the things I do inside that program is help clients create their kind of signature processes. But the place where we start is, what is your current process? It's really doing an audit. I don't call it that, but it is an audit of what is the current process? What's working about it? What isn't working? What's missing? What do you want to add? What do you want to take away? What's too complicated, right?

We just go through all of those things when thinking about the process, their individual coaching processes. So that also is an audit. And that, again, is the backbone and the foundation of a lot of that program.

And anything else, any of the little things along the way that I've created, the summer project, which a lot of you have asked, yes, this will be offered again in the near future. So if you're interested in that, keep an eye out. That will be coming. It probably won't be called the summer project if we're not offering it in the summer. We haven't landed on a new name yet.

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But even within that, the entire time what we're doing, right, we're picking a project, everyone picks a project. They decide what does it look like when it's done? Like what is complete? How will you know? And then they get to work on it. And they come back each week for some guidance, for some coaching. And it's a constant kind of evaluation, right, or audit.

It's 12 weeks to complete the project or to complete a piece of the project, whatever it is they decide. But then the entire time, it keeps you in the state of, okay, is it working? Am I moving towards the goal? Am I creating what I want to create? And it's kind of 12 weeks of being in that constant state of an audit, right?

And then when you offer the Reimagine Mastermind, which I talked about at the beginning of this episode, which is a nine-month business offer, it will be an audit of your entire business. But we will do it in a way where you keep your business running the way it is. You keep what's working and you keep going, while also taking some time out to evaluate and examine, how do I feel about the way I'm currently marketing my business? Is there something I want to add? Does it feel too complicated? Am I doing things that I really don't love doing, right?

So it's just going to give my clients the time, I'm using marketing as an example, but we'll be doing that in every area of business. And it's so important because these are the things that clients often love to skip. And what I've noticed over years, especially of running The Coach Lab, is my clients that are more likely to examine and evaluate their coaching are actually the brand new coaches.

I love this for them. I love that they're so willing to do it. And the clients that really get the most out of an evaluation, and I want to be clear, I'm not saying that the newer coaches shouldn't be evaluating. You absolutely should keep doing it. Amazing. I promise you, if you keep going, it will move you forward faster than people that are not doing it.

But what I find so interesting, and this also happens with me. So this is not, I'm not calling out anyone. I'm also pointing this finger at myself. The clients

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that actually benefit the most from doing this and are sometimes the least likely to do it are the coaches that actually have more experience, that have more experience running their business, that have more experience coaching their clients because they have so much data to go on.

But thoughts often get in the way, which I'm going to tell you what they are right now and tell you why they're actually not true and why an audit is the sexiest thing you could do for your business. The thoughts that often come up for the more experienced coach, for whatever that means to you, this does not mean the coaches making all of the millions of dollars. I don't want you to hear that when I say more experienced.

What I mean in this context by more experienced is just the coach that has clients. That is consistently coaching clients. That has a great idea of what's working, what isn't working when it comes to their coaching and when it comes to building their business, if they're also an entrepreneur.

So the thoughts that I find usually get in the way, the first one, and I think this is interesting. I think actually this gets in the way at every level, is some form of I don't want to see it. Like the awareness is going to be uncomfortable. And this usually happens when something isn't working, right? It's like, oh, I just want to keep moving forward, which, great, definitely keep moving forward. And an evaluation or an audit is sometimes the thing that will actually catapult you forward so much faster.

So this thought, I don't want to see it, I don't want to bring up the uncomfortable things, it's so interesting, right? Because as coaches, this is literally what we're doing all of the time. I can't tell you how many clients I've had in The Coach Lab who say, like, I can just see this thing that would be so beneficial for my client. And they just don't, they aren't open to coaching on it, they don't want to hear it.

And we do this as well, right? Again, I'm also pointing this finger at myself, not just that you. But so many coaches do sometimes get in the space where you're like, this part though, it just feels really uncomfortable. And it's

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not working. And I don't want to look at it, I'm just going to keep powering forward.

And my proposal for you would be, what if you knew that actually taking time to do the thing and bring up that awareness, find that self-awareness, not only would it have you moving forward faster immediately, it will be the thing that keeps your business sustainable and keeps it growing and moving forward.

This is very connected to the next thought, which is I don't have time, right? I'm very busy, I'm running a business, you don't understand, I have all these clients, I'm running all these things. I have this program. I have this mastermind. And it is, you know, a constant work to keep them all going. And why would I take time to evaluate? This is very linked to the last one I shared, right?

And I will make the same argument. What if doing an audit, just taking time and, you know, in the case of the Reimagine Mastermind for example, one hour a week, right? Like, if you think about that, if you think about it that way, if you are setting aside one hour a week to say, what is working? What's not working? Let's look at this. What's working? And sometimes it might be working, but the question might be, depending on kind of where you are in your business, what's working for me? And what isn't?

Because sometimes your business might look like it's working, as in you're making money, you're signing clients, your clients are getting results. But there could be something about it that you no longer love, right? You don't love the format. You don't love the hours that you work. You don't love whatever it is, like fill in the blank. So that could be a question too.

And this doesn't have to be, that's part of why I created this mastermind, because it doesn't have to be like, okay, now let me spend this whole week really turning things around. It sometimes can be as simple as seeing the thing and just making a decision about moving forward. And sometimes it might be a little bit bigger. And it might even be that you see something that you're like, oh, this is a whole project, right?

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For example, something that's on my list. I am not loving hosting my programs or my things on Facebook currently. I've just been having issues with it. It sometimes doesn't, it likes to not let me do things that I need to do. And I have a lot of clients who are like, I'm not really on there. Like they would love it if I had The Coach Lab community, if I hosted it somewhere else.

So that's something that we've put on our list, but we know that's going to be a big project, right? We want to really take the time that if we do it, that our clients feel so nurtured through the process that I really sell them on why they need to move over to this other platform, especially the ones that really love the current structure. And to really just be sure everyone is fully taken care of, that's a big thing, right? That's not going to be like, oh, I just make a decision and then it happens by tomorrow. Not to do it the way I want to do it and the way I run my business.

So things like that, sometimes you see them and it's like, okay, that goes on the shelf. That can't happen overnight. And it's not a priority in this moment, so it's going to be on the shelf for a little bit. Sometimes that's a thing too.

Another thought that gets in the way is I shouldn't need to. I'm experienced. I shouldn't need to do this audit. Like that's for people who are new at this, you know, some form of that thought. And hopefully from what I've already said and how I've already talked about evaluations and audits, you can see that that really isn't true.

Not only should you do it and want to do it, I just think that thought, I shouldn't need to, anytime you're telling yourself, I need to do this, or I shouldn't need to do this. It's never a need. You could run your business for years and years without ever doing an audit or evaluating anything and it might be totally fine.

But my argument would be, what if you wanted to, right? And the way I get myself on board with this, because again, sometimes I have similar thoughts and it's like, I shouldn't need to do this right now or I don't have

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time to do this. All these thoughts, I'm telling you, are also coming from my brain as much as I also hear them from my clients.

But the thing that gets me on the other side of that is, okay, even if I don't want to do the evaluation, like the thought of just completing the evaluation doesn't light me up. But if I connect to what the results are from doing it, what I'm going to learn from doing it, how I'm going to move forward from doing it, then it goes from, I shouldn't need to, to, oh, but I want to. That's the part that is sexy. That's the part that can light you up.

And then the last one, again, of course, these are all connected is, this just isn't fun. Which, just like I said a second ago, I think the solution to that thought of thinking like, this isn't fun, I don't want to do this in my business, is connecting to the result. Is the result fun? Is making more money in your business, does that sound fun? Or your clients getting better and better and better results? Your coaching feeling incredible with each client session?

Do those things feel fun? Because that is what you want to connect to, right? Making that connection, making that leap into, okay, the actual process, although I actually really do kind of enjoy an evaluation. So I don't even know why this thought ever pops up for me. But when I actually start doing it, it's like, oh, yeah, I forgot. I love doing these.

So I actually do love doing them. I think the process is quite fun. I love some self-awareness, even when it feels uncomfortable, because I'm nerdy like that. So that part actually does feel fun to me. But it might not be your brand of fun. And that's okay.

But I'm guessing if you connect to that end result, right? Connect to the fun in that. Or you can replace fun with a different word if that just doesn't land for you. And let yourself be guided by that, right? By the result that you will create by doing the thing. And don't just do it performatively like, okay, I did the eval, that's over. But really go into it with what am I looking to get out of this? What do I want to learn? Why am I doing it? What's the result that I will create later if I continue to do this?

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Okay, friends, that was it for today. The reminder for the day, audits are sexy, evaluations are sexy, and fun, and can really change the trajectory of your coaching, of the way you work with your clients, of your business, of really anything. Of your life, you can use any of these things also in your life, right? You can use them with your clients. I've talked about this in previous episodes, how to use this same skill that I'm talking about right now to use it with your clients in any area of coaching, in any niche, in any area of their life.

So I hope that you enjoyed this. And I'll just do a quick plug. If you found this really interesting, and you're like, you're right, I could be doing this more, there are two options where, again, I've had this realization, this truly is the backbone of my business and of so much of what I teach. So there are two ways that you can work with me right now to just jump right in and start doing evaluations and doing audits.

The first one is if you're listening in real time, of course, the first one is the Coach Lab that is always open. That is for foundational coaching skills where I really help you solidify your skills and then use evaluations to get better and better at your coaching.

And I also, within evaluations, teach several different ways to do them. So I even teach like a five minute evaluation, it does not have to be an all day affair, or even an hour affair, it could literally be five minutes here and there that will change so much about your coaching and your effectiveness as a coach.

And then there's the Reimagine Mastermind, which again, if you're listening in real time, there are a few spots open. If you think one is for you, I would absolutely love you to join. We will be doing a really full business audit and thinking about what is working? What isn't working? What are you loving about your business? What do you feel super connected to? What are your offers? What are any tweaks that you need to make to them?

And what are you not loving? What changes do you want to make? What just isn't landing for you? Maybe looking at the future and saying, here's

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where I know I'm going and something about what I'm doing right now doesn't align with that. Right? I think an audit is so powerful. And I promise you, if you decide to join us, it will not feel like whatever, like the bad version of an audit is, it will feel fun.

And there might be some things that bubble up that feel uncomfortable. But that's why I will be there to coach you the whole way through. And I cannot wait to get started. I'm actually quite excited about this offer and if you think it's for you, let me know. I'm happy to chat with you or we will put the link in the show notes and you can fill out an application and just dive right in.

All right. Thank you for being here today. I will talk to you next week. Goodbye.

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.