

Ep #207: How to Navigate Third-Party Coaching Relationships



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 207.

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, Lindsay here, and before we get started on today's episode I want to give you a little prompt to join us for Coach Week. Coach Week will be October 28th through November 1st, and it is the third annual free Coach Week that includes workshops, trainings, and of course coaching, and a lot of fun.

We also have some added bonuses and just fun extras this year which we are including, some of it for free and some of it in the expanded experience, which will be if you choose to upgrade. But even if you don't, you can come, you can join us for free, you can dip in, watch whatever workshops you want to watch and pick and choose, look at the schedule. But no matter how you join, I can not wait to see you there. We are in full-time prep mode for Coach Week right now and I'm having so much fun creating it for you.

So click the link in the show notes, you can join and register there for free. You can also find the details about the expanded experience there. You can also find it in my Instagram bio, just @LindsayDotzlaf on Instagram. Or send me an email if you can't find it anywhere. Last ditch effort, shoot me an email and I will get you the link because you have to be there. If you're a coach, it's a must. All right? See you there. Now onto today's episode.

Hey coach, I want to dig into something today. I'm excited to do this. This is actually something that came up on a Coach Lab call today, but this is something that comes up consistently within many of my containers and I realized, as I was coaching on it today, that I have never recorded a

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podcast on this. And so I'm just going to hop on and record it because I think it's something that actually affects a lot of coaches.

I think one reason that I haven't recorded a podcast on it up until this point is because I thought, well, not a lot of my clients experience this, but what I'm learning is that's actually not true. There are many, many examples where this can come into play. And that is what do you do, how do you coach someone, how do you show up as the coach when someone else that isn't your client is paying for the coaching? I'm going to give you some examples of this.

So here's how I'm going to break this down. First, I'm going to tell you what I mean, give you examples, show you how this might actually pertain to you, even if in this moment, you're like, oh, I don't know. Like that's not a thing that happens. It might be a thing that happens and you haven't thought about it this way. Or if you're a newer coach, this is something that could come up. So I think it's worth a listen either way.

And then some of you, this is like your entire business. And this is going to be a really important episode for you to listen to, especially if you ever feel yourself kind of getting stuck knowing what to do in those situations.

So first of all, shout out to my client. Thank you so much for bringing this to The Coach Lab call today and letting me walk you through it because I think it's a really important topic.

So here's where I'm going to start. First, I'm just going to give you some examples of when this could be a thing. And I'm positive as I'm going through this, there will be some examples that maybe you have been a coach in certain circumstances that I have never even considered or that I'm not going to bring up right now, and that's totally fine. Take whatever your examples are, and you can apply what I'm going to tell you and how to think about the coaching. You can apply that to, I think, any type of scenario like this.

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If you have one that you're like, nope, this is actually totally different, I would love to hear it. You can find me, probably the easiest way is on Instagram, @LindsayDotzlaf, and just let me know what your thing is. Maybe I'll address that as well on the podcast at some point. But here are my examples.

These are the ones that I see most often. So one would be a parent buying coaching for their kid, right? So like a coach for teenagers, a coach for even young adults, a coach for maybe someone who is wanting to get into a certain college or applying for jobs or something like that, a younger person, and the parent is the one hiring the coach. Or I have seen examples of a spouse or a partner paying for coaching for their partner, right? So whatever type of coaching that is, I've seen that as a thing that could apply to lots of different niches.

Or, this is the one I coach on probably the most often, a supervisor or a boss or a manager paying for, in some way, a coach to coach someone who works for them. And this is the one that came up on The Coach Lab call today. And again, probably the one I see the most often.

Now, here's who this isn't for. I mean, definitely still listen, you're still going to get some stuff out of it. But I want to be clear about the difference between these two things. So one would be a coach who's an employee for a company who's coaching people within the company. Now, you are still going to take something away from this episode. It will just be a little different.

You'll have to listen for like, what are the pieces that apply to you? Because not all of it will because as an employee, hopefully your employer is giving you some of their own guidelines on how this works, right? If you are like a full-time employee for a company, or even a part-time employee for a company and you're coaching for them, hopefully they have made it very clear what your role is, how you are to show up as the coach, et cetera.

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But if there is any gray area in that, or if it feels a little loosey-goosey, like they haven't quite thought it through, then this episode might actually be really useful for you to take back, maybe have a conversation with them around it.

The other situation that I'm not necessarily talking about in this podcast is if someone is paying for coaching, and it's 100% their choice, with money that is somehow given to them. So like an employee stipend, a professional development fund, that type of thing where the employee gets 100% say over, here's the thing I want to do.

I've actually had some clients like this come into The Coach Lab where they've given me a form that I've had to fill out for them and then they give it to their employer because they do have to make sure that it falls within the bounds of what the money is allowed to be used for. But other than that, the employee has no say over what happens or what results, the employer has no connection to what results the employee is getting.

They just assume, okay, they signed up for this thing. It is professional development. We're going to trust that that's a thing. We looked at the course and it looks like it fits, so yes. So that is a little different. To me, that's like the employee is still picking and selecting you and showing up as if they are just your regular client. It's just someone else is basically gifting them money to pay for it.

The same would be true if, you know, a partner or a parent or a friend or a relative offers to kind of gift money to pay for coaching. That is very different. Like there's no investment in the results or, I mean, besides caring about this person in your life, but they aren't connected to the coaching or the results in any way.

So the number one thing, or a lot of things that people bring to me, how I know that this can create issues is where there becomes some confusion around who are the results for? Who are you reporting to? What is your role as the coach? What are you, what's expected from you? Who is setting

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the goals? Is it the client or is it the person paying? Is there some sort of connection to the goals to if it's paid for or not? Just all of those questions.

And it's interesting because I can often spot this when a client of mine is asking for coaching and they don't tell me this is a thing, and then they start to describe the problems. And often it shows up as a lot of confusion on the coach's side, and I think on the client's side too, around what are the goals? What are we working on? Well, here's this thing I know I'm supposed to be working on, but I don't really want those results, right? Like that type of thing.

And I'll give you some more specific examples in a bit so you might understand more of what I'm saying. But that's normally how it shows up. Just some confusion around what are we doing here? Which, if you've been a longtime listener and you've listened to many of my episodes, that kind of goes against a lot of what I believe about coaching, which is that the client should be so clear what results they want from coaching.

And you as the coach, to be the best coach for the client, should also be very clear. So anytime you're not, whether someone else is paying for it or not, I think it's always a good time to pause and say, okay, wait, why are we not clear here? And this just happens to be a case that can create confusion and not lend itself towards a lot of clarity if you aren't very dialed in on how you deal with this as a coach.

And maybe this has never come up for you, but just take note that this episode is here just in case at some point in the future someone comes to you and says, hey, my partner wants to pay for this coaching for me and he is really excited about the results I'm going to get. And you can just feel like, okay, does the client want this or does the partner like, let's just check in. So just take note, you can always come back and listen to this later.

So the biggest thing, the biggest advice and also thing I coach on when this comes up in my containers is that you, as the coach, have to decide your policies ahead of time and be so clear what they are, especially if this is

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something that you are doing regularly, right? If this is like, if your niche is coaching teenagers, or your niche is coaching employees and it's usually being paid for by supervisors, then asking yourself these questions is going to be really, really important.

It is literally these are policies of the way your business runs, right? So we cannot skip this step, where you decide ahead of time what your policies are. And I would suggest you do it in two different ways, in two different categories, let's say.

So one would be the selling of the coaching, you have some decisions to make around that. And I always suggest you make them ahead of time so that you're clear how you run your business and how you want to do it. That way, when a client comes to you, you're like, oh yeah, here's how we do this, here's the structure, instead of letting someone come to you and then you asking like, well, what do you want to do? Do you want me to talk to both of you? Do you whatever? Like really think through what is your preference.

So for example, some decisions you probably want to make when it comes to the selling, and this is assuming you're having an interaction with the person buying, right? There could be people in The Coach Lab whose partner or parent or someone paid for it for them and I just had no idea because they just, I don't interact with them through the buying process besides, like I don't interact with them personally, so it wouldn't have even come up. So that could be a thing, but that's not what I'm talking about.

This is like if you are selling one on one coaching, or some form or maybe group coaching, some form of coaching that you're going to have this more of a one on one interaction with someone and you feel quite connected to the results that they're going to get.

So the first thing is to think about if you do a consult or a sales call, how do you do it? How do you want to do it, in this case, when someone else is paying? Are they both on the phone or on Zoom or however you do your

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consults? Are they on at the same time? What's the structure of it? What does that look like? Do you talk to each of them separately? Or do you only talk to one of them?

And my recommendation, if you only talk to one of them, would be that it's always the client, right? Like you always want the client buy-in, which I'll get to in a second. So if it comes down to that, that would be my suggestion. But my overall suggestion would probably be in most cases that you do talk to both people, the person paying and the person who's going to be the client.

And then next, I think it's really important that you decide ahead of time, even in the selling, like during the selling of the coaching is what exactly your role is as the coach. Are you there just for the client and just for whatever results the client wants, and you coach them on that specifically, and it doesn't really matter what the person paying wants, right? Like that's one option. It happens to be my kind of favorite option.

I think it maybe depends on your container, who you're coaching and what your niche is. But in most cases, I always prefer this just because I think, to me, that's what coaching is. It's quite personal. And I don't know, it seems weird to me that someone else would be deciding like what my goals are or whatever.

But I know this isn't always the case, especially in corporate environments. So you just knowing those things ahead of time so that you can be super clear about them, whether you're, let's say you're on Zoom or a phone call with both of the people, you can just lay it out, right? Like here's my role as the coach, here's your role as the client, and here's your role as the third party.

So for example, my role as the coach is I come to these sessions every week. I coach you, the client, on whatever you want coaching on. And if the two of you connect outside of that about your coaching, that's up to you. This is an example, not saying that this is the right way to do it, right? But

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that could be one way. And then your role as the third party is you pay for the coaching, but we don't interact. That's one option.

Or it could be, here's my role as the coach, I come to these sessions, I coach you every week. Once a month, I meet with you, the third party, to kind of go over whatever my client has given me consent to go over with you. And then we're all in on it, right? Everybody, it's like an open door, everybody knows what's happening on all sides. And if you all meet outside of that and talk about the coaching, amazing, right?

But just setting those ground rules ahead of time so that there's never confusion, there's never any like, what is your role? What are the goals here? What are we working on?

And I think one of the most important pieces in the selling, and this is probably an opinion, not a fact. I say probably, but I'll own that it's an opinion. I do think no matter what you're doing, no matter how you are doing this, that you should be getting the buy-in of the client that they really want the coaching, right? That they want to work with a coach, that they are on board working with a coach, that they are kind of choosing it versus them being kind of forced into coaching, which can be a fine line there, especially in corporate settings.

But if it were up to me, and I was deciding how all of you run your businesses, I would make that a rule that the client always has to be bought in, right? Not necessarily with money, but with commitment and a desire for the coaching. Coaching is just so much more fun when everybody wants the results, right? When it's like we're all working towards something that feels great to the client, that the client is totally on board, it just makes your job as a coach so much easier and so much more fun.

So then there is now how do you structure and what are your policies around the implementation of the coaching, right? So I kind of hinted at it just a second ago, but just answering the questions, how do you meet with

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the client? How often? Do you meet with the third party at all? Do you have any interaction with them? Do you share updates or progress?

And what is your rule on consent of sharing that, right? Like, do you ask the client first? Hey, you know, I have a meeting with your supervisor next week, what do you want me to report? Like, what are the things you want me to share? Or is there anything that we've talked about that you don't want me to share? Or having a conversation around that together, around here's what I think the update is, what do you think about this?

I think just being so open and honest around that and just sharing with both parties so that whoever is paying, so if it's the third party, they don't come to you and say like, but wait, tell me everything that's happening. And you have to say, oh, that's not something I do. I can't do that without consent from my client. And then it creates a whole thing.

I've seen all different scenarios of this around just some confusion when it's not super clear upfront what your role is as the coach. So I'm going to share two personal examples, one as a client and one as a coach.

First, I'll start with the coach, or start with my example as a coach. So when I was a one-on-one coach, I had someone come to me and say, hey, I'm interested in coaching. And I was like, great. And she said, the main thing I want to coach on is my relationship with my husband. And I was like, great. And I can definitely do that. Love coaching on relationships. Do you want to set up a time to chat? She said, sure.

So we did, we got on the phone and were chatting and something just felt weird. Like the way she's answering questions seems kind of weird. And finally, I just said, I'm just curious, this was a long time ago, but I asked something along the lines of, is this something that you want? At this time I had no idea that her husband wanted to pay for it. I said, is this coaching something that you want? You seem really kind of hesitant about the commitment, or I don't know, I'm sensing some hesitation and I'm just curious what that is.

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And so she said something like, well, I don't really know if I want it, but my husband, like he knew someone who knows me, that person sent him my information and he decided that his wife needed coaching. And he was happy to pay for it.

Now, first I had lots of thoughts about this, but it actually turned into a really great conversation with her where I was like, listen, here's my policy. If I coach you, I mean, it's fine, whoever wants to pay can pay. But if I coach you, I am coaching you, not him. It is totally up to you what you want to share with him, what you don't want to share with him. I am not going to report back to him, right?

Like this was just the way I did it at the time. To me, in that situation, it made no sense why I would be reporting back about her coaching on her relationship to the person that she's getting coaching around, right?

She did actually end up working with me for a while and it was amazing, but I was very clear so that if she was like, you're right, this isn't what I want, that would have been fine too, right? I did not, there was no world where I was going to let him pay for coaching and then me show up for the coaching making sure I was coaching her into whatever actions he wanted.

Now, this is also just a rule for me, when I think about a relationship like this, I'm very clear personally, and again this is opinion, that coaching is working towards whatever goal a client wants, not coaching them into different behavior that someone else wants, right? And that's a really important distinction.

So if you're often in this role where you are coaching clients and someone else is paying and they're like in on what's going on and what the results are, you just want to be very clear about that boundary for you as the coach, right? Like make sure that you define it, that it is crystal clear in your mind. And it doesn't have to be the same as mine.

It could be a little different, especially if you are coaching kids, right? Or coaching younger people where the parent is making the investment and

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the kid and the parent are really both invested in the results, right? I do still think it's important to have that talk with the kid to say like, is this what you want? Like however you would do that in your own way. I have an interview coming up at some point soon with the coach that my daughter works with. So that will be interesting, I'll definitely be asking her about this. So I think there is a little gray area there.

But just considering what is your boundary as the coach? What is your role as the coach? What do you feel comfortable in? What do you not? I was very clear when that woman came to me and asked me for the coaching, I was so clear what we were going to be doing. Now she was like, oh. Like once I explained it, she was all in.

She loved the idea. She was like, oh, this is for me. Right? And I really helped her see that. The husband still paid for it, which was a huge celebration. And it was like a win all around. But that isn't the right answer. That was just how I decided to handle it, right?

Now I'll give you an example of when I have been more on the client side or actually the third party side, which I actually just mentioned a second ago, where I hired a coach for my daughter. I think she was 14 at the time and I've talked about that here on the podcast before. And it was incredible.

My experience of that, and keep in mind, I'm a coach. I actually coach on these things. So I already had my opinion of how it should go going into the relationship. I mean, as in I was fully on board with what she was going to tell me and open to hearing her process, not like I was going to tell her what I wanted the process to be.

But I was very aware of what coaching is, that I didn't want to be overly involved in all the things that they were coaching on, right? But don't make that assumption about your clients, especially if they've never had a coach or if they aren't a coach, right? Like they just won't have as much awareness as I did going into it.

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But the way it worked, the way we did it is she had a call with me to kind of hear like what's going on. Why do you want to hire a coach for your daughter? And then she had a call with my daughter and I was sitting there like on the Zoom in the room at first while they met each other and chatted for a second. And then I left the room and they got to talk.

And I'm assuming one thing that happened when I left the room is that she probably, this is an assumption because of the relationship that they ended up having and how comfortable my daughter was with her. I assume there was some kind of conversation around, is this something you want? Kind of like here's what coaching is, how do you think this could help you?

And so we had that conversation. They had the conversation. And then when we decided to hire her, which was a joint decision, we talked about it after we both had calls with her. We talked about it and then I reached out. I let her know, you know, here's what we've decided, we're in. Let's do it.

And then her structure was, I believe it was my daughter did weekly calls, but then we did a 15 minute monthly check-in. But with the check-in, she asked my daughter every time what was okay to share and what wasn't. So there could actually be things that they talked about or coached on and maybe they coached on me, right? Or my rules or who knows what. I don't know, I never heard it if they did. But there could be things they coached on that I don't know about at all.

But for the most part, she seemed to be pretty open, my daughter did, like you can share whatever. And the check-ins would be very brief and just kind of, here's how it's going. Here's, you know, at first it was like, she can be kind of quiet, which is true. I was like, yep, not surprised. And so then it was my job, like maybe we have some conversations about what she could bring to the calls.

Or I would point out things during the week when the things that were happening that she wanted, like the reason we hired a coach, when those things would come up, I would say, oh, be sure to talk to Jill about this this

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week if you want to. Or maybe take note of that so you can bring it up with Jill or, you know, whatever. I would kind of give her that responsibility and it seemed to work really well.

So that was the structure of that. And that is not the only way, I'm sure there are different ways to do it. But the moral of the story is for you to just be super clear ahead of time what it would look like for you. And if someone comes to you, if this is not what you usually do, and like me when I was a one-on-one coach, when someone came to me and said, hey, would you want to do this? My husband's paying. I took a second to think about it for myself.

Would I do that? Why would I? Why wouldn't I? What are my kind of boundaries around this? What are my policies as the coach? So if this doesn't really apply to you, but someone brings you something like this, I think it's okay. I know it's okay actually to say, oh yeah, absolutely. Let's chat about this. And give yourself a minute to think about it and just work through these things.

What are my policies? Who am I working for? What am I willing to accept as a client, and be careful especially if you're a brand new coach and you just really want to sign clients, which I totally can remember and resonate with. And just be careful of getting yourself in a situation that you then feel overwhelmed by or unclear and confused all the time.

I see this really affects coaches' confidence on occasion when they don't think through these things because maybe they've never even considered it or they've never been taught how to handle this situation.

So hopefully this was useful for you. If you have any other questions about this, again, find me on Instagram, shoot me a message. I'm always here for you and interested in hearing what you have to say and happy coaching and I'll talk to you next week. All right. Goodbye.

Thanks for listening to this episode of *Mastering Coaching Skills*. If you want to learn more about my work, come visit me at

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See you next week.