

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025



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With Your Host

Lindsay Dotzlaf

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Hey, this is Lindsay Dotzlaf and you are listening to Mastering Coaching Skills episode 219.

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. Happy New Year. If you're listening in real time, welcome to 2025. I'm so glad we all made it. And I want to talk to you today about something that I have been, first of all, you've heard me already talking about it, but I wanna teach you a little bit today, something that I've been teaching in recent workshops I've been doing where I've been helping my clients and some of you prepare your coaching practice for the next year of your business. And one thing that I have been teaching is this idea of breaking your business or your practice up into quarters and thinking about what projects and what your focus is for each quarter.

So today I'm gonna teach you a little bit about that, why I love it, why I think it's really impactful, and hopefully convince you that it is a really good way to kind of plan your business and think about what's coming up, and maybe even open your mind to what I mean when I say a project or a focus, and just let you in a little bit on how I think about it. As always, what I'm gonna teach you today is something that you can use for yourself, but of course, it's always something that you can use when working with your clients, right? Anything that you love that I talk about here today, it's something that you could think about, like how could I implement this with my clients? Are there any pieces of this that could be impactful when it comes to the work that we're doing together?

So just a little more about what I mean when I say divide your work up into quarters. I've been doing this for a few years in my business, but it's gotten even more and more clear over the last couple of years as I have spent some time really thinking about this and trying to stay more connected to

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

this process because it seems to work really well for me and the way I like to work. So one thing that I think is very common, I know I did it when I was almost at a newer coach, but for years really in my business, and I see so many coaches really at every level, do this thing where when it comes to running your business and coaching your clients, there are at all times 20 things on the table that need to be worked on, right?

Like you have this big thing coming up, you have this workbook you're working on, you are focusing on learning this new skill, you're creating this new offer, a new program, you're learning to sell the offer, the list could go on and on and on and on and on and on. You're starting a podcast. You're starting a YouTube channel. You're learning a new method of promoting yourself on social media. You're working on Facebook ads, doing workshops for the first time, right? Like literally any of those things could be its own project but what a lot of you do is you pile them all on to kind of ah, you know, it's more like a to-do list instead of thinking about your business in a way that's like, okay, what runs smoothly and do I just need to keep doing? And then what are the extra things where that take a little bit of more, a little more of my time and energy that I want to put more focus on right now? Here's how I think about my business.

And I just wanna, before I even say this, I want to be very clear, this is not a perfect science. There are many times where I break this down for myself, I schedule things, I put them on the calendar for the next year, and it turns out things change down the road, or I do end up with more than one project happening at a time, or selling a new offer doesn't go as planned, so I'm busy doing that while I'm also working on something else, right? Just wanna be very clear upfront, this is not a perfect science. But the more I think about this type of schedule ahead of time, the more kind of smooth my year tends to run, and I do know in the years when I haven't done this as much, focused on this type of planning, they have felt a little more wobbly and like I have a lot going on all at once.

So the first thing I want to tell you is what I mean by this. Oh, actually, I want to come back to how I think about my business. So I don't know what

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

this is even called. I feel like we use this as an analogy or metaphor or whatever a lot, but I don't even know what this person is called, but you know, like the plate spinners, are those even around anymore? I don't even know where we would see those, maybe at a circus or something or something like that, where there's like different acts going on. But the person who's like, there are a bunch of poles, and then they're spinning plates, and they're balancing the spinning plates on all of the poles, right.

And sometimes we can use this in a way that isn't useful, right, where you feel a little I used to describe feeling overwhelmed, especially when my kids were really little as it just feels like I'm that person, but like the plates keep falling and I can't keep them all up, which is not the goal. Obviously, that's not how you want your business or your coaching practice to feel, but how you can use this in a way that's very useful is to think of your coaching practice as the main goal in the beginning is to learn the first couple major skills, right? You need to know how to coach and you need to know how to sell or market your coaching in some way or like let people know that you're open for business and that you can help them.

So let's say those are like the two plates, right? So first, whichever one you're doing first, probably learning to coach, that's like one plate and you're going to get it on the pole and you're going to spin it. And after a little bit, you're going to get really good at spinning that one. It doesn't mean it never needs attention again, but like for right now, okay, that one's going great. And then the second one, which you know, those first two, you kind of do have to do them pretty close together to get your business up and going. But the second one, like learning how to just tell people you can help them, that's the second plate. And now that's spinning. And I want you to just imagine that once you get the plates on there, and they're spinning, that they don't need nearly as much attention, right?

They just need an occasional touch or an occasional spin. They do need attention every once in a while, but not nearly as much attention as when you're just learning how to spin a plate, right? Or how to do one task. But then after those, and as you keep going, as you keep growing your

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

business, the way I love to think about it is everything I'm adding is like another plate. And I don't want to add another one until the ones that are there are kind of spinning with minimal effort. So if I'm creating a new program, or if I'm starting a podcast, if I'm, just any time that there's a project that is something new, I think of that as this is the one that I'm learning to spin right now, right? This is the new plate that I'm adding where it's going to take a lot of my attention.

Or you could think about it too, like juggling, right? Like some people, like you start learning. I've seen, I don't know how to juggle, but I've seen tutorials where you start with like two balls or whatever, and then you add a third one. And then if you think about people that are like performers, you might see them juggling like 10 things, right? But they didn't learn to juggle all 10 of those things all at once. They probably learned with a couple balls at first and then over time learned how to just add one more, add one more.

If you start to think about your business like that, there are so many benefits to really breaking it down like this because what I see so many coaches do, especially new coaches is they look at the examples of what other people are doing, especially coaches maybe like myself or like other coaches in the industry who've been in the industry for quite a while, whose businesses are much more complicated than the beginner's business would be or should be. And you think, oh, I have to do all of these things. Like clearly all of these actions are what is making this business successful. So I need to as quickly as possible have 10 spinning plates.

And I just want you to know if that's you, that you could be doing yourself a disservice. So one thing that I love to do, and I love to teach my clients, is when I'm thinking about my yearly schedule, I love to split it into quarters and pick my focus, my main focus, or project for each quarter. That might be one single thing. Every once in a while, it might even be one single thing for two quarters. I think that's probably more rare, at least for me at the place where I am in my business. But when I do that, it really helps me narrow down what I'm working on for the year.

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

It helps me stay focused and not pick too many things that are just gonna have my focus all over the place for the year. And it really allows me to kind of look ahead and say, Okay, what do I need to plan for each focus or project for every quarter? So I'll give you an example. When you are planning your business for the next year, I want you to think about like, first of all, just consider where are you starting, right? If you're a brand new coach and your main focus right now is to feel confident in your coaching, I would put that on quarter one, right?

Main focus, feel confident in my coaching, practice coaching as much as possible, learn coaching techniques, hone my coaching style, like any of those things could be your first focus, right? And then it's super clear for quarter one, this is the main thing I'm working on. Or let's say you've been a coach for a while, you just created a new offer or you think you want to create a new offer and it's something you've never sold or it's a little bit of like a deviation from what you have been selling. That could also be a project, right? Just creating and learning to sell a new offer. That could take three months. Technically it could take longer than three months but creating the main bones of it, definitely you can create a new offer in much less than three months.

And then the learning to sell it could be a work in progress, but creating the main pieces of that process could happen for sure within three months. This could also look like, if you have a very specific coach certification on your list that's like pretty intensive, right? And you know that's happening in September, amazing. That could be your project for quarter three. Or you know you have a big challenge that you run every year and this year you're redoing a bunch of pieces of it, right? Like for me, you may have heard me do something called Coach Week. I usually do that in October. Like at this point we could run it pretty smoothly without having to put tons of separate time and attention outside of normal business time and attention into it.

But let's say I was going to make a bunch of big changes to it. That would be my probably quarter three project, right? Really thinking about that, planning it out, implementing it, running it, all of those things. It could be

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

something very specific and measurable like creating a workbook for your clients or writing a book or starting and launching a podcast or building out a program, right? It took me about three months, like once I stopped overthinking and worked through all my blocks around it, it took me about three months to create the main bones and launch for The Coach Lab, which now has hundreds of people, hundreds of coaches, clients in it and is, you know, one of my main offers and one of my favorite things that was created in the way that I'm about to tell you right now.

So I'm going to give you some arguments for why thinking about your year like this can be really effective and why it works. So I gave you some examples and those literally could be anything that's on your mind. Anything that's like, here's where my clear focus is going for these three months. And I don't at this point need to think about anything outside of that because you can think of that as this is the three months, let's say you're learning to sell a new offer. This is the three months that I'm creating and learning to sell this new offer. That's like getting one of the plates spinning, right?

So the other plates, you might already have a couple of plates spinning. And that to me is like business as usual. These are the things that I've already learned, that I already know how to do, that I've already put my focus on. They don't require as much of my time and attention now as they did when they were brand new. So now it's time for me to add another thing. Another bonus before I move on to why this works is that when you plan in quarters like this, it also allows you if you have something big in your life happening, right?

If you're getting married, if you are having a baby, if you are traveling for a month in the spring, if you are, right, like any of those things, if there's someone in your life that you want to help take care of and you know that's the thing that's coming, any of those things that are just like, oh, this is gonna take a significant amount of my time and it's out of the ordinary, then when it comes to your business, whatever quarter that falls in that that thing is happening, maybe that's your focus, right?

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

You don't add an extra project or an extra focus for your business. You just keep it business as usual. You just spin the however many plates are already up and spinning without adding another one because you know that kind of like that extra plate that you are adding is coming from your life, right? Not something you're working on in your business. Okay, so now I'm gonna try to convince you why this is a really powerful method for you to use.

And you can call them quarters, you can call them sprints, right? Like I've seen other people, I know there are other planning methods where they call it sprints. You can break your quarters up. If you're like, I know I have a few things that aren't going to take an entire quarter, but I want it to be a main focus. Maybe you put two small projects into one quarter. This is for you to use however it feels useful for you. But here are ways that I have found that it really works for me and that I know, because I've seen it work for my clients, all right?

So the first thing is you can separate out the things that are running smoothly from the projects or focuses that need more of your attention. So coming back to those spinning plates, right? You can make it very clear in your mind when you're planning. What your next year looks like, what's already running smoothly and is just business as usual and I'm going to keep doing these things. And then what are the things that I know I want to dedicate more time and attention to? And you can start to break that down into how much time and attention do I wanna give them.

One reason I'm calling them projects instead of just calling it like your quarterly focus, there's something about calling it a project that makes it very kind of official that allows you to really dig into, like if I frame anything as a project, even if it's learning to sign a client, even if it is something that you may not think usually in terms of a project, you might think like, well, obviously this is like an ongoing thing, but your project could be learning how to sign five clients, learning how to create a wait list, any of those things that you're learning in your business, learning how to grow your e-mail list, right? Which you might normally think as like, this is an ongoing

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

thing, but when you think about it in a project and you put it in one quarter and you're like, this is my focus and the project that I'm working on in this quarter, what it allows you to do is get very strategic and specific.

If my project is to learn how to sell coaching, I'm going to ask myself questions like, okay, what is the strategy I'm going to use to do that? Where am I going to start? What do I already know? What are the skills I'm already bringing into this and what are the obstacles that I know or that I can guess are going to come up, right? What are all the things in the way of me not completing this project already, or that maybe you haven't completed it already because you haven't even started it, but that I know could get in my way of completing this in three months.

Now, as you know, no matter where you are in your coaching practice, no matter what stage you're at, this kind of thing can be an ongoing thing, right? Learning how to sign clients, learning how to adjust to current demands of the market, all of those things are ongoing. But this, what I'm suggesting right now is that you take a moment to claim for quarter one, for quarter two, quarter three, quarter four, whatever it is, whatever part of the year that this is my main focus. This is the plate that I'm learning to spin right now. It will prompt you to choose a timeframe and make a clear cutoff, which is why I love thinking about it in quarters or occasionally breaking it into two projects in a quarter.

So like a month or a month and a half to work on something. It just gives you such a clear delineation of here's the three months that I'm working and here's where this project ends. Not that you're necessarily going to stop working on it, but it'll give you that time frame to pause and really evaluate. Okay, this is what I've been working on for the three months. Here's what I got done, and here's what went really well. Here's what didn't work at all. Here's the maybe more work that I think I need to do on this.

So let's say you're creating a program or a workbook or something that is like a very tangible end result that feels like you're you're not gonna stop working on it if it's not complete, then you just get to decide, okay, knowing

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

what I know now, because maybe this was the first time that I did something like this, how much longer is this going to take me? And it just gives you that cutoff instead of just these ongoing forever projects and things hanging over your head of like, here are all the things I just have to get done. It helps you stay on track when you get distracted or when things pop up and you're like, ooh, maybe I'll work on that right now or maybe I'll work on that right now.

And this one has been really important for me. I think this is one reason that this strategy works well for me is because I can tend to get very distracted or can tend to be excited about other things and then just move on to that more exciting thing instead of completing something maybe that I'm working on now. And then I'll wait till last minute and then I'll still figure it out. But I've learned that when I don't do that, I save myself a lot of heartache around having a bunch of things going that I'm working on that feel kind of new or that take up a lot of brain space all at once, which can sometimes lead to overwhelm or burnout or those things that entrepreneurs have to look out for.

So for me, here's how it pops up for me, and this could look a little differently for you, but what will happen for me is I'll plan my year. Here's this new thing I'm launching in quarter one, so I'm gonna focus on that. Here's the new content I want to add to The Coach Lab. Maybe that's in quarter two, right? Like whatever the rest of the year might look like. I have, I'm hosting a live event for the first time, maybe planning that and getting really clear about what that looks like and selling it. Maybe that's a quarter project.

But what happens is, let's say in quarter one, I'm learning to sell that new offer. It's feeling really hard, right? Like it's exciting at first because it's new and it's exciting and all the things, but it starts to feel hard or, you know, I'm not creating immediately the results that I want or something pops up that's an obstacle I didn't plan for, right? Any of those things could happen. And what my brain will love to do is think about that live event that is happening way in the future that maybe I'll just start that are thinking about that right

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

now. It's my brain's very sneaky way, and it feels productive because I'm still working. I'm still working, thinking about something in my business, but it's really just a distraction. But when I know, when I have it planned out, and I know that that's on the calendar for quarter three, I can tell myself that, right?

I can remind myself, nope, we don't need to think about that right now. Maybe if it's like a moment of inspiration that popped up, I might take a second and like take some notes, right? Pull up my notes app in my phone, jot some things down so I don't forget them. But what I won't allow myself to do is go all in on like following those breadcrumbs, right? Following that like line of distraction that really is just a buffer from the discomfort I'm feeling of staying focused on whatever the main thing is that I'm working on. It will also, especially when you plan them out ahead of time, it'll help you get really clear about the type of support and or learning that you will have to do for those specific things or that you want to find to support you during that quarter or the things that you need to have in place before you can even start to work on that project can help you get so clear, right?

And then instead of having 10 projects going at once and kind of guessing on like, oh, I'm working on this right now, I'm working on this right now, which can sometimes have coaches over-investing in, I'm totally guilty of this myself in like, Oh, well, I wanna learn to have amazing newsletters, so let me join this program, and I want to have consistent business support, so I'm also gonna join this program, and then I want to learn this new coaching technique, so I'm gonna sign up for this thing.

And then they all become, sometimes, can become a little less effective because you're doing a bunch of new things all at the same time. But when you're really clear about what you have coming up, then you know, you see an offer that pops up in your e-mail, and it might, although it might look very intriguing, you can kind of remind yourself, oh, that's not something I'm working on until quarter three, so that can wait.

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

Now, again, just like I said in the beginning, I wanna be very clear, this is not a perfect science. Sometimes when you know you have something coming up and you see an offer that just perfectly aligns with the support you're looking for, there might be a little shifting that happens on your side so that it makes sense to implement because you might not know if that thing is going to be offered again, right? But this just helps you be a lot more intentional about it and the way you're thinking about it.

It also, and this is like, as coaches, maybe it's like we might not wanna think about it like this, but for me, it feels very effective to think this when I am doing something, if it's new, maybe something that's new or something I'm trying or whatever, and it feels very uncomfortable, or it feels like a lot of hard work, or it's like way more work than I expected, or I'm learning this new coaching thing and I don't love the program that I'm in, or just any of those things that come up, it gives me a finish line. I can do anything for three months, right? That's a thought that I have.

Even if it's way more work than I expected, or I underestimated the time and effort it was going to take, or any of those things that could happen, I know that there is a finish line coming. It's not just gonna be this thing that I put off and put off and put off, and it just builds and becomes an even bigger thing that I am not looking forward to than it needs to be. It also allows you, when you think about your coaching and your client delivery, it also allows you to consider those things when planning your projects.

So maybe you have something that feels like quite a large project that you know ahead of time is going to take a lot of your time and attention and more focus than what you currently have to give or then what you would usually have even maybe with your business running as usual. It can allow you to think ahead and kind of plan your offers or coaching time or other projects around this thing you know is gonna take a big part of that, right?

Maybe you plan for that quarter some off days or alone time where you fully separate yourself from all the other humans. You stay at a hotel for a couple nights and you spend a lot of focus time working on the thing or

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

whatever it is, like whatever works for you, but it just allows you to plan around that. Maybe you plan kind of like you would plan for a vacation, but maybe you plan for an entire week where, you know, if you have a pretty full coaching practice, maybe you take an entire week off from coaching your clients and you can plan very strategically ahead of time for that so that your clients aren't upset, so that it's very smooth into you doing that. And then you use that entire week dedicating the whole focus to creating your new program or whatever it is.

Those are all my reasons that I love thinking about it this way. I'm sure that there are so many other ones and I would be curious what yours are if you have planned this way or if you try this and see how it works for you. I would love for you to tell me why it's really effective. And if this is not at all how you are used to thinking about your business, I just wanna offer that of course you can take this and mold it into what works for you, right?

So if you just know that you love having two kind of big things going at once, I'm not here to like talk you out of that. But even then, if you know that, you can still kind of strategically set up your schedule so that to avoid you piling five more things onto those two big things. But when you learn to think about it like this, what happens even if you're a brand new coach, maybe you have a brand new coaching practice, this really gives you insight to more of a kind of mature business strategy, a mature way of thinking about your business. And the more you learn to do it now, the better you're gonna be at continuing down the line.

For me, when I kind of learned to think about my business like this, I had to kind of retrain myself on a lot of learned kind of habits that were happening in my business. So hopefully, no matter where you are in this journey, when you're hearing this, this is something, at least pieces of it, that you could start to implement, no matter, again, where you are in your coaching practice journey. So I hope that was helpful. And then I'm gonna take just a couple minutes here at the end to let you know how I can help you and support you on this journey if it's something that feels aligned for you right now.

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

So obviously, you can take what you heard on this podcast and you can go implement this on your own. Think about what your projects are, stick to your plan, all the things. But if you would love support along the way, I would, you've probably already heard me talk about it if you've been listening to the past podcast, but I would love to just kind of tell you a little bit about an offer I have called The Coach Project. Now, The Coach Project was born from my love of doing this work with my clients. So in my advanced certification and in some other containers I've had in the past, I have made a piece of that container, you know, a portion of it was working on a specific project.

And so this offer came from that, but just stripping it down into just the focus on whatever you decide your project is. Any of the ones that I've mentioned, anything else that you can think of that you know you want to focus 12 weeks or three months, one quarter of your business with the majority of your extra focus and attention going into this one thing that you're learning. The extra plate that you're learning to spin, right? The one thing you're gonna add for the quarter.

So The Coach Project is 12 weeks with weekly coaching sessions and in a group with all coaches working on completely different projects. If you've heard me talk about this in some of the interviews and conversations that I've had with some of my previous clients, this is actually one of the perks of the program is that everyone is working on a different project and it's so useful because you can't compare yourself to what everybody else is doing.

You get so many creative ideas just from listening to other people talk about their project and it keeps you out of, you know, like, oh, I can't do that thing because that's her idea. Because when you take whatever the ideas and you implement it within your project, it's gonna be totally different than whatever the other coach was talking about. It also allows you to very freely share your support and ideas with the group, knowing that not everyone is working on the same thing. So it's not gonna be like a carbon copy of just what someone else says.

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

Like no one can take your idea and just create the exact thing you're creating. It also allows you to spin ideas off each other and brainstorm and collaborate and cheer each other on and just have that consistent support from deciding what your project is to making a plan, working and coaching through the obstacles, and implementing, like finishing the project, completing it, and evaluating. For most everyone in The Coach Project, that is my goal, for everyone to get through all of those steps, right?

Planning, strategizing, recognizing the obstacles, making a plan to work through those obstacles, or to get coached on them, of course. Building the thing, creating the thing, working on the project, and then coming to some sort of completion and then evaluating and figuring out your path forward from there. That is basically the bulk of the offer.

I've run it once this past year. We called it the Summer Project. Obviously, since it's beginning in February of 2025, we can't call it the Summer Project. Most of you listening probably, February is not a summer month for you. So we had to change it up a little bit. And because I love a super duper creative name, we're calling it The Coach Project. But my goal is to help so many of you complete your project, right?

Anything you can dream up that you have had, maybe it's been on your heart for a long time. Maybe it's something new that as I'm talking about this kind of method of thinking about your coaching practice, maybe it's something new that popped up that you know is something you wanna spend three months focused on, and you want to do it with support. Now, within The Coach Project, there are two options. What I just described to you is the standard coach project offer, which is gonna be really great for many types of projects. It will give you accountability, weekly coaching, group help, brainstorming, support, feedback on anything that you want to share with the group and get feedback on. That was something that happened a lot the last time I ran this.

You know, whether that's posting a sales page for review or having someone look at an evaluation you've done or anything, right? Like some

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

pages of your workbook that you're working on, anything like that, that you wanna post and just get feedback on, that is available for the entire three months. Then there's another option where you get to work a little more closely with me. It's called a VIP mentorship. It's within The Coach Project. So you get all of that that I just mentioned. You get the weekly calls, the community, all of that. And then you add in for those three months, you add in one, one-on-one call with me for each month.

So those are for the projects that you know, either you just want additional support, great. Or you know are going to take a little more time and attention. You want a little more strategizing and you want my complete attention once a month to help you kind of strategize, to coach you, to really work through any of those big things that are getting in your way. So I hope that you join us. I can't wait to see you there. And if you join now from this podcast, we will put a link in the podcast notes.

One thing that I will offer you, only when you join from the special link, I offered it as a bonus at the end of 2024, but that time has passed, but I'm gonna open it up again just for, specifically for you, if you're listening, and if you decide to join, you will get a bonus that is worth almost the price of entry, I would say. A bonus that is gonna be really useful, that's gonna help you plan every part of 2025, which is a quarterly call to go over your yearly plan. So first of all, actually I should back up. You get the replay for the big picture workshop that I did at the end of 2024.

If you weren't there, couldn't make it, didn't know about it, any of the things, you get the replay for that and the workbook that goes along with it, virtual workbook, like online workbook or PDF. And then you'll get a quarterly planning session for every quarter for 2025. When you join, you'll be getting the, in January we'll send out an e-mail. It has all the dates for each quarter, for each session, so you can plan ahead where you get to meet with me and a handful of other coaches and just go through, like, okay, what were your goals?

Ep #219: Quarterly Planning for Coaches: Supercharge Your Progress in 2025

What are your projects? What are your focuses for each quarter? And I will check in with you every single quarter. I cannot wait to do this work with you. I hope you join me, but if not, I hope that you learned a lot today and that you take anything that you heard from this. Take it with you, use it, let me know how it goes, and I'll talk to you again 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.