

# Ep #225: Mastering the Art of Goal Setting: A Coach's Guide to Client Success



## Full Episode Transcript

With Your Host

**Lindsay Dotzlaf**

## Ep #225: Mastering the Art of Goal Setting: A Coach's Guide to Client Success

Hey, this is Lindsay Dotzlaf and you are listening to *Mastering Coaching Skills* episode 225.

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 have to tell you something really quick before I start today's episode. I'm feeling a little bit of rage right now. And if you've listened to the podcast for a while, you might know that is not something I tend to feel. But I know some of you like it when I share some of these little things.

So I'll just tell you, nothing makes me more mad than my dog getting into the trash. Do you have a dog that does this? Like if you do, maybe you get it. I don't know why there's something about it. Like it's just so ridiculous and it makes me so angry.

And part of it could be that my dog is pretty chill most of the time if you're a client of mine. You may have seen her before in the background of calls just laying on my office floor. She is a fairly chill dog, but she has two modes. She's chill like 90% of the time and then the other 10% she's just unhinged. Like there's no, there's no in between. It's one or the other and the 10%, some of it I can handle, but getting into the trash really just makes me crazy.

So that's my share for today. Thank you for listening. I feel a lot better. Let's just dig in.

So today we're gonna talk about one of my favorite topics. And I know that I've recorded podcasts about this before and there could be some repeats. I didn't go back and listen to all of them, but here's what I'm going to say. Today we're gonna talk about goal setting and why it's important to do with your clients.

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And I think even if I say a few things that I've said in past episodes. I know for sure there will be some new stuff, but even if most of it is a repeat for you or you've heard some of this in other places, what I want you to really understand is how important goal setting is as a coach. And this applies to you no matter what kind of coach you are. Maybe you have your own way of doing it, maybe you don't call them goals, you call it something else, but I do think that goal setting is like the backbone of coaching and one of the things that differentiates coaching from some other things, which I'll get into in a minute.

But today, in this episode, what we're going to talk about is goal setting and most importantly, why it matters, why it's so important and how it makes your coaching so much better when you lean into setting goals, clear goals with your clients. I'm gonna talk about some challenges that come up for a lot of coaches and of course, some solutions to those problems or those challenges. And then I'm also going to invite you to a masterclass that I'm hosting coming up.

So if you don't make it all the way through the episode or you have to listen in chunks, be sure to check the show notes. We'll put the masterclass link there for you. And I will be talking about it a little bit at the end of the episode.

So here's where I want to start with this. So if you know me, if you've listened to the podcast or you've been in my world for a while, you know that I run a program for coaches called The Coach Lab. If you're not in there, you should be. I don't know what you're waiting for. Come join us. We'll put that link in the show notes as well.

If you don't know me, if you just happened to catch this episode, it's your very first episode, welcome. I'm so glad you're here. And The Coach Lab is just a lifetime access program for coaches where we focus on foundational coaching skills and just being really good at coaching.

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But we have weekly coaching sessions where anybody that wants to come can come and we can talk through things that happen in coaching sessions or in your relationships with your clients that you need support with. One of the things that comes up most often is coaches being a little confused about, okay, I don't know where to go next, or my client keeps coming with not a lot to coach on or the coaching feels all over the place, it doesn't feel like my best coaching, some version of one of those things. And hopefully by the end of this episode, I'm going to show you how setting really clear goals can help you clean up so many of the issues that you face in your client sessions, if this is you, or even if you're not seeing really any issues, how it might make your coaching better, right? Like how setting clear goals can improve your coaching.

So first let's talk about some of the reasons I think setting clear goals is really important for your coaching. First of all, which I already briefly mentioned this, but I do think that goal setting and having that future focus is kind of the backbone of coaching. I think, this is my opinion. I know some of you might disagree with me around this, so just keep an open mind because I think there are lots of variations of coaches and so many variations of therapists, counselors, all of that.

But I do think it's one of the main differentiators between coaching and other modalities, right? If you think about therapy, often, not always, focuses on healing, on understanding the past, on understanding why you are the way you are and how you show up day to day in your life because of those things, talking through all of that. Whereas most coaching is very future oriented and very focused on here's where I am now and this is what I want to create or this is where I want to be in whatever way, right? In so many different ways, like depending on what your niche is and what your clients want to work on. But to me, that is one of the main differences between coaching and so many of the other modalities.

When you set clear goals with your clients, I think the biggest thing that happens is you create a really clear shared picture, shared vision, future

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vision between the coach and the client, right? So it really ensures that you're both on the same page. It ensures that you as the coach are really clear what your client is working on in their terms also, right? In the way that they describe it without you making assumptions about, you know, without taking like a very broad goal and just making a bunch of assumptions about what that means to them. And it really helps your client stay on track with that vision too, right? It helps them clear it up. It helps them, it might even help them get really clear on exactly what that looks like.

Maybe they come to you with something quite broad and you ask some really good clarifying questions and they leave even that maybe first session or whatever it is that you're doing this goal setting work with them, even more clear about what it is that they want. So it's helping just everybody get on the same page with a shared vision of specifically what the client wants. Not what you want for the client, but what the client wants.

It also helps provide measurable progress markers, right? So it allows you as the coach either with your client or on your own to kind of think through okay if this is where they are now and this is where they want to go what are kind of the benchmarks along the way what are the you know the things that they'll start to see the results that they might start to see along the way.

And if you've been doing it for a while and you coach a lot on some of the same things, you might even know what those benchmarks are and can use them even in your marketing and the way you talk about what your coaching is, right? If you kind of see like, here's the progress most of my clients make, here are the benchmarks they hit along the way. Those can be really compelling things to first of all show that you understand and second to talk about to get your clients excited about not just that end goal but all the things that they might achieve or you know the goals they're going to hit along the way.

Or even define goals that they didn't even know they had that are gonna be really fun for you to show them. Okay, if you work on this bigger overall

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thing, like here are the small things that we can start to count as wins and celebrations while working towards the bigger goal.

It also, when you do this upfront and you get really clear about the goals, it helps the clients get really clear about and start to identify the potential obstacles and limiting beliefs that they might already know they have. So when you kind of force them into talking about their goal, getting as clear as they can, that could automatically bring up some things that are like, okay, here's what I already see. Here's what I already know I'm going to need help with. I already know this doesn't feel possible.

It just really allows you to even ask if you want to, like after you're finished setting goals, to even ask like, okay, what do you already know are the obstacles between where you are now and where you want to go? This big goal you've just set, what are things that you just know right away come up? That can be really valuable information and can start to prompt immediate coaching, right? It can start to show you, oh, here's exactly where you can go once you kind of set the goals and now you're diving into the coaching.

It also can give you something very specific to check in on in each session, right? So especially if you're a coach that doesn't have a super strict structure for your sessions or how each session goes and you're more of a like, you know, just come each week and we're going to talk through whatever's coming up. When you're really clear about what your client's goals are, it allows you to check in specifically. How is this thing going? How did, you know, that conversation around this thing go that you knew you had to have? How did – it just kind of keeps everyone on the same page, gives you an opportunity to know, to kind of have a list of like, here are the things that I would expect them to be working through after our initial conversation, and you can just get to work, right? Talking through each of them.

Now let's talk about some of the reasons that I see, I'm sure there are more than this, but these are the ones I see the most, of why coaches don't do

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this. Why you're not doing this or why you don't take the time to get really clear on what the client wants. And before I do that, I want to be really clear. This is very common. I think it's one of the, like I said in the beginning of the episode, this is why I'm talking about this. It's one of the things that keeps coaches from being even better at what they do.

This is something that comes to me all the time in The Coach Lab, and here's how I know right away when the goal setting is the issue, is when a client, when one of my clients is describing to me this, here's what's happening in my coaching sessions. Here's where I feel stuck.

Here's – and they'll kind of tell me some things or tell me specifics about what the client is doing. I will ask, okay, what's their goal? Why did they hire you? I know right away if they've done the work of really setting up the goal or not, right? I know right away, because they'll either pause and look at me like, what do you mean? Or they'll describe it in a way that's so abstract that even I am like, okay, what exactly does that mean? And so I can just see it, right? You can see all the issues that it creates when they're not doing this. And it's such an easy fix, such an easy fix.

So here are the things that I know that get in the way, at least for my clients, is when you set clear goals, sometimes you as a coach might have more fear of the client failing and what that means about you as a coach. You might have lots of thoughts attached to that like, but if we set really clear goals and then they aren't kind of meeting those benchmarks along the way or they aren't making any progress, then it's no longer abstract. It's really tangible and here are all the things I'm going to make that mean about me as a coach. It means I'm failing. It means I'm not doing a good job.

My argument for that is that it's actually exactly the opposite. You can't guarantee that every client that hires you gets the exact results that they want. This is true, I think, no matter what type of coach you are. I wish we could, that would be amazing. But when you start to get really clear about goal setting, it can move that marker to more of your clients getting more



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results, not the other way. Because it makes your coaching so much more targeted and productive.

Another thing I see getting in the way is coaches thinking that there's a right goal, right? That we have to find, we have to somehow land on this right goal and that it's going to be like the perfect thing once we find it. And if it's not very clear, then we're just going to move on instead of, you know, pausing and just like setting a goal. And my thoughts on that is that there's no right goal because the entire purpose of setting a goal is to kind of be just that guiding light, right?

It's like, if you've heard me teach this, I say it's kind of like the lighthouse with like that light is shining. It just gives you a light that you're like, that's the direction we're heading. That's the entire reason that you set them. There's no right goal. And I know that because along the way, the goals might change. The clients might discover they don't actually want that, they want something different. Or you know they might be modified somehow. Or I mean there are so many different options of what could happen, but just thinking there is a right goal will completely take you out of the point of goal setting at all.

Another reason is maybe you're afraid of your clients or you know that some of their goals are, feel a little more intangible, right? Like they want more confidence or they want work-life balance. And that's okay. Don't be afraid of those goals. Just help them get more clear, right? So if you aren't totally clear, if you're like, I don't really know, what does that mean to them? What does feeling more confident mean? Ask them, right? Don't be afraid to break those down and get really specific. Ask really great questions about them. I'll give you some tips for this in a second.

Or maybe you know your client is coming to you with multiple goals, right? And so you're like, I don't even know where to start. I'm not sure which one, like which one do we start with? How do we get really clear? How do we focus on two at the same time? And just all of those thoughts, right? Like



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you having those thoughts gets in the way of you helping the client get really clear about the goals, even if there are multiple goals.

And the last one is just navigating scattered kind of client thinking and lack of focus. So maybe you have your first, maybe it's your first session and you're digging into goals and your client is kind of all over the place and if you don't know how to reel them back in and get really clear about what it is that they're wanting to achieve in their work with you then that can be right I've seen some coaches like well we spent so much time on that so we should just like move on like let's just get to the coaching.

And then this brings me to the last one, which is probably the one I see most often, which is we'll spend a few minutes setting goals, but then we just need to get to it. We need to get to the coaching, we need to dig in. This is like the biggest mistake I think you can make. And again, I'll give you some tips for it in a minute. But when you do that, yes, I know it's so fun to dig into the coaching. Trust me, I know it's my favorite part, right?

But if you are skipping setting the goals because you just want to get to the plan, get to the strategizing, get to the mindset work, get to whatever it is that you're doing in your sessions, you are missing a really good opportunity to create some of the things I've already talked about, right? To create all of that clarity for yourself and for the client.

So let's now talk about the cost of skipping the goal setting. So some of this I already sprinkled in as I was talking about the challenges, but let's really dig into the cost, right? The first one, probably obvious because I've already said it, is the loss of session structure and direction. Anytime you feel this way in your coaching is a good time to pause and ask yourself, do I, am I super clear what my client's goals are?

It's also a missed opportunity to start uncovering all the limiting beliefs and thoughts and you know all of it that goes along with the goals. I already mentioned that. It also makes it really hard for you as the coach to answer

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the question like is it working? Are they making progress? If you aren't really sure what the progress looks like.

And think about how that can reflect when you are trying to demonstrate the value of coaching in maybe your marketing or anywhere in your content. Right, So that can have a bigger effect outside of just your client session. It can really turn into this bigger overall thing that also a lot of my clients come to me with, which is like, I don't really know like how to talk about coaching, how to describe what it is I do with my clients.

It can also create this relationship with your clients where there's reduced accountability because you're not both completely clear about what you're working towards and possibly lack of engagement with a client.

So if a client just kind of isn't showing up or is kind of lackadaisical about the coaching sessions or is kind of like take it or leave it, I would look into this, right? Are the goals clear? And then it can also create clients showing up often, maybe with nothing to coach on. Now this doesn't always mean that the goals aren't defined. Sometimes it is there are other reasons that can happen but if this is happening often with your clients this is something I would check in on especially if it's one client and it happens a lot right if it's like if it's like a one-off thing I don't think it's an issue at all. If it is something that's happening frequently, then it could be a good question to ask. Just do we have clear defined goals?

So here are some practical strategies that you can use in your coaching to start reframing the way you approach goal setting. First one, don't be afraid to spend a ridiculous amount of time setting goals. So that might be in a single session, right? Some of you I know do like one-off coaching sessions and don't be afraid to spend the first five minutes, ten minutes even, thinking about what are we accomplishing over the next, let's say, hour.

Now, obviously, you don't wanna spend a ridiculous amount of time in that situation because if you only have the hour, which is one reason I don't always love one-off coaching sessions, but I would for sure at least take a

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couple minutes and just get really clear. What are we working on? What would you love? What's the outcome you would love to have, love to see at the end of the session.

But if you have longer coaching periods with your clients, right, if you coach them for three months or six months or a year, however long you're coaching your clients, don't be afraid to spend at least the entire first session setting goals and getting really clear, not just setting the goal like naming it, but naming it and getting super, super clear, right? Like what does that mean to you? Especially with the intangible, the ones that feel a little less measurable or a little more intangible to you, right? So that you're both really clear, like what does this look like on a daily basis?

If a client hires you because they want to feel more confident, okay, what does that mean? Why do they want that? What does that look like? Give me some practical examples of what you could see happening when you have more confidence. What does the day-to-day of that look like? There are so many ways you can explore that.

And although I'm not a huge proponent or huge believer that you need to be taking rigorous notes of every coaching session. I do think, especially if you have long-term relationships with clients, you're coaching them over a period of time, it can be important for you just as the coach to write down their specific goals in their words so that you can always come back and revisit them.

You can also spend some time, even if the goal is very measurable, right? And it's very clear to everybody, it has maybe a number attached to it, or something that's like a very clear, yes, you've done it, we can check the box off, I would still spend some time getting clear about why they want to reach those goals and what are some kind of milestones along the way, right? You can ask them, you can help them set milestones or we can, you can explore them together. That could be a really powerful thing.

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You can also start to do with a measurable goal, you can start to really do the math and see if it's possible, right? For example, if you're a business coach and a client hires you and they're like, I wanna make \$100,000 this year, and you get clear about what their offer is, what they're charging, like all of those things, you can actually do the math and say, okay, how many clients does that mean you need to sign every month or every quarter or whatever, right?

You can start to really break it down so that you're making the goal smaller and smaller until it's like here's what we're working on right now. And it also kind of shows you like is this even possible with what I am doing right now. If you do the math and it's like you have to sign, you know, I don't know, a thousand clients this year and that doesn't fit like the model of the way you're coaching, then it's like a mismatch, right? So then that just gives you some information. We either have to change the goal or change the structure.

If your client comes to you with multiple goals, especially let's say you're a general life coach and your client kind of comes with like, here are all the things I want to work on. And that sometimes stops you from getting clear about them. Don't let it because what you can do is use all of them, get really clear about all of them, and then just decide together, okay, where do you wanna start? Let's just pick one.

And then one more thing you can do to really help solidify this goal strategy is to decide ahead of time if you have particular clients who are often going off on tangents or who are coming to sessions with things completely unrelated to their goals or what you're working on, you can just make a strategy for that for yourself as the coach ahead of time. If you have never experienced this, guaranteed you will at some point. This is sometimes just how clients show up. This doesn't always mean that you don't have clear goals set. It might just mean that it will take some effort on your end to just redirect the client.

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The way I always handled that was when I was a one-on-one coach was if it was like a one-time thing not a problem, right? If it happened multiple times I would always just point out, hey, like here's what we're working towards. I know this is what you told me you really wanna work on. We've spent the last couple sessions talking about this other thing. I just wanna be sure that that is exactly what you want to be working on today, right? Just giving the client the clarity and then the choice to say, to tell you, yeah, I know, and yes, I would like to keep talking about this.

Okay, so hopefully this has all been really helpful. Just a quick recap. Remember, goal setting, very important. Remember all the reasons that it's super beneficial for yourself and for your clients, and really think through some of those simple strategies I gave you so you can start to solve for that if this is an issue that you have. And of course, one reason that I left out but I kind of wanted to save till the end, another big thing that gets in the way of coaches setting clear goals with their clients is your own thoughts about goals, right?

So if you are like, "I'm not a person who's good at hitting goals" or, "You know, I get, I feel so much pressure when I hit goals" or whatever your thoughts and feelings are about goals, that's also a really good place, obviously, to spend some time exploring because the better you are at it, the better you're going to be doing these things with your clients.

Not like you have to be perfect at setting goals in every single occasion and every single type of goal that could come up in your life, but just if you immediately react and are like, "Ooh, yikes, goals", that's just something to be aware of, right, and to consider the more comfortable you become with this for yourself, the better and better you will be at doing it with your clients, which is of course going to improve your coaching every single time day by day.

One thing I want to end with, first I hope this was super helpful. I hope that it helped clear up some things for you and I want to, if you enjoyed this and you're like, "Okay, fine, I'm all in, I'm into goals, I wanna be better at helping

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my clients set them", I am hosting an upcoming masterclass where I'm going to, this is actually something I'm teaching inside The Coach Lab but then I'm modifying it for a masterclass for everyone. And that is coming up.

So if that's something you want to register for, we will include that link in the show notes. But I'll be going over how, like giving you a specific strategy of how to set specific clear goals with your clients. I will be using, you've probably heard of this before, I'll be using a little bit of the SMART goals framework because I think that that does encompass a lot of the parts that I think about when I think about goals, but I have my own kind of twist on it.

So I'll be teaching that, telling you like how to modify it and specifically for coaching, how to use that framework to really help your clients and yourself get clear about what they are working towards. All right.

So if you're listening in real time, find the link, join us, come to the masterclass, and then of course, during the masterclass, I'm gonna tell you at the end, and then you should join The Coach Lab because that is where we are constantly working on these things, constantly talking about goals and coaching on them, and that's where I will support you in your very specific client needs and client journeys, and just support you in being the best coach that you can be.

All right, thank you so much for being here today. I can't wait to talk to you next week. I will see you then. 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](http://lindsaydotzlafoaching.com). That's Lindsay with an A, D-O-T-Z-L-A-F.com. See you next week.