

- HOW TO - RUN A SUCCESSFUL COACHING CALL

STEPS

PREPARATION



For new clients, have them take a simple survey beforehand to help with setting and meeting expectations.

For a regular client, have them fill up a coaching session form that maps out what issues need to be addressed, what was achieved and what challenges were faced since the last session.

Review any notes from the previous session and take note of any topics that need to be brought up.

ASSESSMENT

PRO TIP
Helping your client to gain awareness and insight plays a huge part as your role as their coach.

This is where coaches focus on providing well-timed feedback on their client's intentions, performance and inconsistencies. Make suggestions on how you think they can reach their goals.

Ask your client questions to help clarify their goals such as:

WHAT WOULD HAVE TO CHANGE TO REACH THAT GOAL?

WHAT HAVE YOU TRIED? WHAT WOULD YOU CONSIDER?

WHAT'S YOUR IDEAL OUTCOME FOR THIS SITUATION?

HOW WILL WE MEASURE THE SUCCESS OF THIS GOAL?

TAKING ACTION



At the end of your call, decide on an action plan, define the outcome and set deadlines for your client.

It's also important to identify what might get in the way of accomplishing these goals and how you can help support them, reemphasizing your commitment to them.

WRAP-UP



This is the MOST IMPORTANT PART of your coaching call. You need to make sure your client is happy, energized and feel as if they've not only got their monies worth, but that you've genuinely helped move the needle for them!

RECAP THE SESSION AND SUMMARIZE ANY COMMITMENTS AND ACTIONS THAT NEED TO BE TAKEN BY THE NEXT SESSION.

SHARE ANY TAKEAWAYS, OR INSIGHTS GAINED FROM THE SESSION.

SCHEDULE AND CONFIRM THE NEXT APPOINTMENT.

ONLINE TOOLS

THESE TOOLS WILL HELP YOU RUN SUCCESSFUL CALLS FOR YOUR COACHING CLIENTS.

GOTOMEETING

This is a popular tool especially for one-on-one coaching calls which allows you to record your calls (which can be a great help to your clients) and share your screens during video chats.

GoToMeeting

SCHEDULE ONCE

This meeting and appointment scheduling software spares coaches from back-and-forth emails on deciding on when the next session should be.

ScheduleOnce

COGGLE

This free collaborative mind-mapping service is perfect for brainstorming sessions either in a group or between two people.

coggle

SKYPE

Almost everyone has this software on their computers.

skype

TIPS

BUILD RELATIONSHIPS

Clients usually find it easier to learn from coaches they know, like and trust, so it's important to show good judgment and keep any promises, or agreements made.



BE SUPPORTIVE TO KEEP UP ACCOUNTABILITY

Most of the heavy lifting is done by the client, which is why coaches need to be there to support and keep their clients accountable to their goals.



PUT A PREMIUM ON COMMUNICATION

One of the most important skills a coach should develop is art of listening, doing so will give your client both attention and impact!

