

# 4 Steps to Effective Coaching

*How to learn more  
effective work habits*

A guide for adults





# Introduction

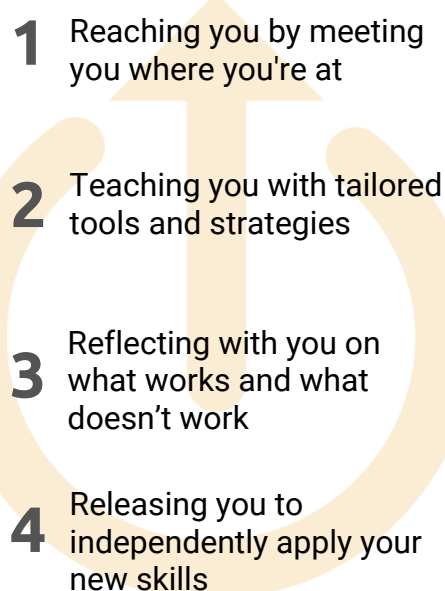
## *"If I'm so smart, why am I struggling?"*

You've always been told how smart you are - ever since you were a kid. You see a world of possibilities awaiting you but you can't seem to get where you want to be in your life, personally or professionally. If only... if only you could be more organized or stop getting distracted by your phone or be more disciplined about how you work or keep your important papers organized. Maybe you've tried apps and self-help books or advice from bosses or your partner - yet the new methods of managing your life never seem to stick and are discarded as quickly as they're begun.

The hard truth is that your potential will be forever elusive until you develop the critical skills for managing your life's demands. So, how do you go about building those abilities? The answer lies in understanding how people change their behavior and cultivate new habits.



In this guide, we will describe four critical requirements for effective behavior change:

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- 1 Reaching you by meeting you where you're at
  - 2 Teaching you with tailored tools and strategies
  - 3 Reflecting with you on what works and what doesn't work
  - 4 Releasing you to independently apply your new skills

We will explain why each component is critical and how WorkSmart coaching incorporates these principles to help you effectively develop your skills, achieve your goals, and ultimately transform your habits to meet the needs of complex and changing demands in your life.



# 1 Reaching you by meeting you where you're at

## *Learning new habits is uncomfortable*

Building good habits involves repetition. Lots of it. There's no easy shortcut, much as we may want a quick fix to anything we are trying to improve: healthful eating, fewer Netflix binges, clutter-free countertops. You may want to procrastinate less, get to appointments on time, or keep your space organized, but the uncomfortable truth is that making those changes is, well, uncomfortable.

After all, when you are building a brand new habit, there's a great deal of behind-the-scenes action happening. First, you have to have the insight that your current habit is not leading to your desired outcome: stress-free evenings, easily locating house keys or other belongings, an organized work space, and so on. Second, you need to identify exactly what needs to be done differently in order to achieve a better result. Third, and most important, you need to simultaneously stop an ingrained pattern of behavior and start a brand new pattern, and stick with that new behavior for a while.

In other words, you need to stop doing what has become easy and purposely do something difficult. Is it any wonder that it's so tough to follow through on that intention to build a better habit?



## *Desire for change varies*

Research tells us that behavior change is a process that has several predictable stages. It's not as simple as black or white; do it or don't do it; human beings are complex creatures and these stages reflect those shades of gray that are involved in changing any habit.



# 1 Reaching you by meeting you where you're at

Consider your own experience with change. For instance, on your way to deciding to strap on that Fitbit and get your 10,000 steps a day, it's likely that you went through a series of changes in your mindset that made it possible.

See if you can recognize your own path to change in the stages and examples below:

**Stage One:** "No, I am not interested in discussing this. It's not a problem and I don't need to do anything about it."

**Stage Two:** "I am thinking about changing my behavior, but I'm not committing to doing anything. I may decide not to change after all."

**Stage Three:** "I've decided that it's a good idea to change my behavior and I'm making a plan for how and when I'll do it."

**Stage Four:** "I'm working on my new behavior and trying to keep consistent. I slip up sometimes but try to get right back to my new way of doing things."

**Stage Five:** "I have a solid new habit that takes the place of the old behavior. It doesn't feel difficult to do anymore."

These five stages of change are based in research that has decades of proven efficacy in helping people to change their habits.







# 1 Reaching you by meeting you where you're at

## *How we reach people in different stages*

*"When you clench your fist, no one can put anything in your hand." Alex Haley*

We often hear clients say to us that they've been given plenty of tips and advice for how to keep organized or stay focused or manage their time. These helpful suggestions are often dismissed or ignored because the person is in the first stage of behavior change, where they don't see a reason to do anything different. In other words, their mind is closed to the idea and there's no way to force it open. How do we get people to "unclench their fists" and open their minds to the possibility of changing their habits? The answer is by starting with making an authentic connection to the person.

**For people in Stage One, we focus on building the relationship so that the you begin to see your coach as an ally and collaborator.** We assure you that we will never force you to do anything and that you will always have choices in your work with the coach.

Listening carefully and empathizing with your feelings is a critical component at this stage - it forms a foundation of trust upon which the coaching relationship is built. Once a trusting relationship is established, your coach may invite you to consider imagining how your life might improve with new habits in place. Your coach may guide you through a careful consideration of the pros and cons of changing your habits as a way to segue you to Stage Two in your journey of change.

**People who are in Stage Two are typically ambivalent about changing their habits.** A coach helps you explore your attitudes at this point in the coaching process, as a way to help you gain a deeper understanding of your behavior and beliefs about your ability to make positive changes in your life. Your coach also explores the costs of not making changes and examines the downside of maintaining the status quo, to highlight the problems you're



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## *How we reach people in different stages*

experiencing and inspire just enough discomfort to move toward actually wanting to make change. In Stage Two, coaches often share examples to tools or strategies you could use and discuss how these can simplify your life, if you decide to try them. You learn that change is a process and not a single event, which can help you see that any goal you set can be achieved with the right plan in place.

**Stage Three marks a turning point in the coaching process.** At this time, you have decided to change a habit because you've discovered your own reasons and understand how you will benefit from that change. Maybe it's the way you handle your work deadlines, or organize your documents, or structure your day - regardless of the desired outcome, success begins with a specific plan that you can follow. Coaches work with people in Stage Three to determine the *when* and the *how* of enacting their plan. You are encouraged to be as specific as possible and to anticipate roadblocks so you can be prepared to follow through on your plan.

For instance, if you decide that you are going to start building a habit of making a plan for your day, your coach may prompt you to consider how your best intentions may be foiled. You may think for a moment and mention that it's hard to stop scrolling your news feed when you wake up - before you know it, it's 8:15 am and you haven't even jumped in the shower.

With this roadblock uncovered, your coach and you can collaboratively devise a plan to counter that time-draining activity.





# 1 Reaching you by meeting you where you're at

## *How we reach people in different stages*

Perhaps you agree to block that website with an app like Self Control until later in the evening, when your workday is over. This process of anticipating problems in following through with a plan improves your chances of success. When you get a quick win early on by sticking with your plan, you begin to build confidence that you can make changes successfully, despite roadblocks that occur.

Of course, after making a detailed plan comes Stage Four, where you are actively doing something different. It could be, for example, filing your papers daily, or resisting the lure of social media during the day, or digging into a work project before it's crunch time. **Coaching in Stage Four is focused on helping you to be accountable for sticking with your plan, even when it's difficult.** Your coach checks in with you between sessions, typically via text messages, to encourage and provide reinforcement for following through with your plans.



Perfection is not the goal - your ownership of new behavior is the aim in Stage Four. Through frequent reflection, your coach helps you identify and celebrate successes and bounce back from failures. You learn that changing an old habit and replacing it with a new one takes time, patience, and persistence.

As you gain insight about how you motivate yourself and what strategies work best for you, you become equipped to apply your skills across contexts in your life.



# 1 Reaching you by meeting you where you're at

## *Why the connection with the coach is so important*

At Stage 5, you have a solidly established habit that feels less effortful than in Stage 4. You've moved toward actually *being* that person who keeps organized or accomplishes daily goals, instead of *trying to be* someone who does those behaviors.

As with any habit, backsliding into old habits can and does occur from time to time. Your coach helps you identify the cause of any backslides and frame those moments as normal - the key is to return to the new behavior without an "all or nothing" belief that could allow a reversal to old habits. In this stage, coaches often reflect on how far a person has progressed as one way to reinforce maintaining new behaviors and to build confidence.

With many people who deny that they could benefit from support or changing their habits, what we see underlying that resistance is a powerful emotion: shame.

**People are often ashamed or embarrassed at their shortcomings or the holes they've dug for themselves and it can feel more comfortable for them to shut themselves off to intervention.**

In a way, it's understandable for a struggling person to dig in their heels. When you resist support, you can avoid confronting your challenges. That's why it is critical to allow time for a coach and client to develop a trusting relationship. When a client sees a coach as a true ally, that client becomes more willing to take risks in trying new ways of approaching their demands.







## 2 Teaching you with tailored tools and strategies

### *Context Matters*

Have you ever noticed that when someone offers advice on an issue that's not currently a problem for you, that you tend to tune it out? That's because the context or personal relevance is missing. The same can be said for effective coaching of adults: it's not as simple as offering a cookie-cutter solution and hoping you will recognize when and where to apply strategies in your daily work. Instead, you need to feel value from the time you spend with a coach - and that value is in the form of relevant tools and strategies that meet your needs in the moment - *today*.



### *Choice Matters*

So much of an adult's day is non-negotiable. You often cannot decide when your workday starts, the colleagues you work with, or if you need to pay bills and buy groceries. **Yet choice is a key factor in helping people feel empowered to make changes in their lives.**

That's why coaches build choice into the coaching process. They may present you with a couple of options for planning a project, for instance, and help you evaluate them according to your needs and preferences in combination with the demands of your project. People feel empowered and invested when they have a say in the strategies they use to overcome their challenges. Another important aspect of choice is that the process prompts reflection and introspection. A coach may ask, "I notice that you've selected the same tool for both preparing for a family vacation and completing a report for work. Why do you think it will work well for both? What do you like about this strategy?"



## 2 Teaching you with tailored tools and strategies

Explorations behind the reasons for your choices help you learn more about yourself and serve as a guide for future choices.

### *Follow-up matters*

Can you recall a time when you intended to do something but never followed through? We've all had those moments (sometimes more often than we'd like to admit). That's why your coach will ask you to make specific commitments during sessions. You may say, "I will put all my appointments in my Google calendar and add daily reminders." Your coach then follows up to see if you met your commitment. This check-in can take any form, though typically clients prefer text messages to communicate with their coaches between sessions. These brief check-ins (typically 1-2 minutes) serve 2 important roles in the coaching process. First, they help to remind and keep you accountable for your commitments. **When you know your coach will be following up, you're much more likely to go through with your intended plan, which helps you make steady progress toward your goals.**

Second, checking in helps to build the connection between you and your coach, so that you come to recognize that your coach is an ally who is invested in your wellbeing.

### *Consistency matters*

Your goals in coaching, like fitness goals, can only be achieved through consistent work. Just as you couldn't expect to run a marathon by training once in a while, the process of developing Executive Function skills relies upon ongoing, regular coaching sessions. Even though life can get hectic and you may feel torn between the different activities and demands of daily life, your commitment to consistent coaching sessions will help to reinforce the importance of the work that is being done. We've found that when coaching is infrequent, progress can suffer. You can lose momentum if you develop a pattern of starting and stopping regular coaching sessions, as the coach often needs to go back and review strategies that you may have forgotten.



# 3 Reflecting on what works and what doesn't work for you

The philosopher and educator John Dewey said, "We do not learn from experience...we learn from reflecting on experience." **Without taking the time to reflect on progress and roadblocks, you can't be expected to gain true insight about your needs and capacities.** How often have you seen yourself make the same mistakes over and over, while wondering why you can't seem to correct those errors? It's possible that the missing ingredient was reflection. It is through the process of careful reflection that you start to understand your strengths and challenges and make decisions that take your own unique profile into account.



Take, for example, a person who repeatedly gets tripped up by a poor time management strategy - perhaps they rely on their memory to recall when to leave for an appointment - but more often than not, they get involved with a task that results in a late arrival and a lot of stress. That person may feel upset that they are not getting the results they want but are too close to the problem to step back and troubleshoot the situation. They may blame the traffic, the time of day the appointment was made, or the complex nature of the task they were doing as the cause of their lateness.

Now it seems a little easier to imagine why the person keeps repeating the same mistake. A coach would prompt the client to reflect on their behaviors in order to help the clients gain insight - their own "aha" moment - that helps them abandon old habits and adopt new, more effective methods.



# 3 Reflecting on what works and what doesn't work for you

## *What the reflection practice brings to you*

Reflecting helps you make connections between one experience and the next. You begin to see that, instead of a random series of events, your experiences influence your choices. Insight helps you set and recalibrate goals more realistically. While goals should be challenging, they should also be achievable.

Consider, for example, a person who wants to complete three major home organizing projects in one month. It's an admirable goal, but it may be an unrealistic jump to expect for a person who has challenges starting and planning multi-step projects. Upon reflection and the coach's guidance, the person may come to understand that setting a goal relating to their process for managing these projects may be the more useful way to attain their objective. The revised goal may be to plan out a timeline for one project, with an explicit plan in place to get materials and persist with completing the job.

Ongoing reflection with the coach would likely result in some tweaks to this process-oriented goal over the coming weeks. Ultimately, the client finishes the month with a project that's finished, a solid set of planning strategies, and a deeper self-knowledge that helps them be more effective.

Finally, the process of reflection gives equal time to the wins and not just the struggles. **Too often, people who are accustomed to failure see only the problems they've encountered.** When you are prompted to consider what went well and why, the positive emphasis helps rebuild your self-esteem and gain resilience when you struggle. In fact, research has shown that individuals who can find something positive in a stressful situation tend to bounce back more effectively from setbacks than those who focus on the negative aspects. We all experience failure at some point - it's comforting to know that your coach knows how to frame those moments for you in a way that helps build your resilience, through the process of reflection.





## 4 Releasing you to independently apply new skills

The ultimate goal in coaching is for the client to be independent from a coach's support. As with any journey of self-improvement and personal discovery, the timeline toward independence can vary. Some people who enter the process prepared to make immediate changes in a couple areas (Stage Four, described earlier), such as managing their screen time, can be independent with their new skill set in a relatively short time. Conversely, clients who begin coaching at Stage One - or for whom a wide range of self-management skills need development - can expect a longer trajectory toward independence.

*"I had problems my whole life with staying organized and managing my time. I was worried it was too late for me to improve. I'm glad to say I was wrong! After 6 months of coaching, I have the chaos under control, have time for myself and my family, and I feel less anxious at work. A colleague commented on the changes during a recent conference we attended together, 'You're on time for all the meetings - and you seem more relaxed and attentive!'"*

Diane - Insurance Professional

### *How does your coach know you are ready to conclude coaching?*

Coaches look for a client who has transformed their habits and can apply their strategies without prompting or assistance from the coach. You are typically ready to move on from coaching when you feel confident in your ability to handle whatever comes your way in life. **A new self-image emerges as you see yourself as capable, resilient, and equipped with the tools you need to be successful.** When the time is best for you, it's important to show that we have confidence in your abilities to manage your demands without coaching support.

Be assured that returning to coaching is always an option, should the need arise. In fact, many of our clients come back to coaching at times of transition, such as a promotion at work or other significant life change in order to update and refine their tools and strategies for a new environment.



# Conclusion

WorkSmart coaches promote lasting behavior change by using the four steps to effective coaching: **Reach, Teach, Reflect, and Release.**

Our process of coaching has 4 elements:

**1) Reach: Connecting with you and meeting you where you're at**



**2) Teach: Using tailored tools and strategies to foster new work habits**



**3) Reflect: Pausing and reflecting on results in order to solidify learning**



And finally, as new habits become more automatic...

**4) Release: Encouraging you to independently apply your personal toolkit of strategies**

## *Meaningful change is a process*

There are no shortcuts toward lasting and meaningful change. The brain is an adaptive organ that helps us learn new skills by actually doing them - but those neural connections take time to establish (and time, as well, to undo ineffective habits). Just as you wouldn't expect to speak fluently in a new language without frequent practice and effort, the goal of behavior and attitude change takes consistent work and a belief that you will achieve your goals, given the optimal circumstances: a caring, dedicated coach who is invested in your success, a consistent schedule of meetings, a process that helps you gain insight, and the personalized tools that will transform the way you see yourself and your possibilities in the greater world.





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