

Date: December 2013

Host: Robyn Logan and Andrea Lee

Topic: CoachStreet #10 – Coaching by Calendar

Welcome

Welcome to CoachStreet, the premium podcast that brings you insider coaching conversations in the fast lane. When coaches need to shift gears, they come to the CoachStreet podcast. Grab a coffee and buckle your seat belts as hosts Andrea Lee, from the Wealthy Thought Leader and Robyn Logan from Coach Campus, learn what drives the world's most successful coaches.

INTRODUCTION

Hi everyone, and welcome to CoachStreet. Here we are with our tenth episode and the topic for today is Coaching by Calendar. I'm Robyn Logan and I'm joined by my co-host, Andrea Lee. Hi, Andrea.

Andrea: Hey Robyn, good to be here.

Robyn: Good to be here, too. I'm crawling a little bit, I must admit, towards the end of the year, which is sort of weak given that I've just had a holiday. I feel embarrassed saying that. How are you going as it approaches Christmas/New Year?

Andrea: A little winded. Like at the end of a marathon a little bit. I still have gas in the tank to cross in good style but I'm definitely feeling it.

COACHING BY CALENDAR

Robyn: Good. Let's get into the topic for today because we also have a change on our tenth episode. We're changing the structure slightly because we can and we like to always evolve.

Spot the Coaching is going to turn into a new section, which I'm pretty excited about. That will be later when we can talk a bit more about what we're doing.

The topic for today, Coaching by Calendar, is a really interesting concept which I'll let you introduce since you came up with it.

Andrea: This idea of coaching by calendar, simply put, is to partner with the calendar--by calendar I mean the months, the days, the years—and allow that environment of time on your calendar to support you in the conversations you have with your clients.

It's fun because I think, as you mentioned before Robyn, a lot of us do this kind of subconsciously, without realizing it. You were saying, "Oh, it's November. We only have a month left." Or when you get on the phone with a client at a certain time of year you might have certain things go through your mind.

Robyn: I think that's right given that I've just heard this concept literally 15 minutes ago when we got together. I've got some more questions about it, just to get clear on what you're talking about.

You're saying like with your clients that you actually have a calendar open and you are bringing awareness to them about what? Like events or months? How do you actually structure it? How does it impact the coaching?

Andrea: It's not so much that I have a calendar open. It's that as a coach I am more aware and actively use where I am in the calendar and where I am in the season of the client's life, the timeframe of the client's life, as a context setting for the coaching that's happening.

Let's say I'm coaching Harry and he's about to turn 60. Well, that kind of calendar event of his birthday, turning 60, is actually a really useful coaching tool. I can say things to him like, "So you're turning 60. How does that feel? Is there anything special that you feel you'd like to work on before you turn 60? Is it a milestone for you or is it not?" Those kinds of things.

That's just one example. There are lots of ways to partner with a calendar but that's probably one of the bigger ones. Birthdays are really good things to coach to.

Robyn: You're right; it's like what I was saying before. People do that sort of unconsciously just to bring that forward more, or maybe it's the types of people who are really into calendars a lot more than other types.

I think doing that even in just a year-long frame rather than always thinking about the moment, which is good too, but this concept of having a client and thinking about them in a longer space—you're thinking a lot more forward than you would otherwise.

Andrea: It's kind of a backdrop for any day-to-day things. You might be working on the career aspect of Harry's life and say, "Who are you networking with," and these kinds of nitty-gritty things. But you can also say, "All right, Thanksgiving is coming up. How about if we set yourself a goal to do something in your job search by Thanksgiving? What do you think you'd like that to be?"

Or Thanksgiving is coming and Harry doesn't want to do anything before Thanksgiving so you say, "How about an exercise to do with Thanksgiving? Could you find 12 things to be grateful for this week even though you've been laid off?"

In addition to things like birthdays, we can look over the calendar year and see there's New Year's, Valentine's Day, Mother's Day, Father's Day, Remembrance Day here in Canada, Thanksgiving, Halloween, Year End, just to name a few.

Robyn: Chinese New Year.

Andrea: Right. Maui Independence Day, yeah?

Think in a 12-Month Span

Robyn: Those events throughout the year, I think we do this as well, business by calendar. I know when we're thinking about campaigns or thinking about when to release a program more and more I'm finding I'm being forced into what doesn't come naturally, which is to think in a 12-month span.

It doesn't actually come naturally to me. I'm much more in the moment. What do I feel like doing today? It might not be what I feel like doing

tomorrow. The more and more I spend time in business I realize that being able to hold that 12-month frame and plan ahead, is actually very useful.

Andrea: Most of the time the clients themselves are not seeing that frame. That's where I think of it as a coach's tool. A calendar becomes a coach's tool.

Robyn: Yeah, they're not seeing that frame. I think that's a good point. In fact, most of the group that I'm in, we do quarterly goals. We're supposed to; I don't always do them. Quarterly goals provide quite a nice structure. That's the other thing about coaching. Coaching is a lot about accountability and structure, more than people think.

I find a lot of people often focus on the coaching skills but honestly, just the ability to have a structure in your life—and it can be anything—quarterly is useful. Quarterly is good; it's a nice chunk. There are four of those a year. And setting some goals for that I think is useful.

The other thing I think is interesting is I'm seeing more and more that people are taking on clients now from the get-go at a 12-month contract. So you come onboard as a client and it's a 12 month coaching program and here's what we'll achieve in that 12 months. This, I've got to say, makes perfect sense to me because it really does take a long time to achieve big goals.

Andrea: I think it's Malcolm Gladwell, to attribute properly, who describes that. In order to get any piece of really good work done in your life, whether it's build a really strong relationship or set the foundation for a degree or really getting healthy in some way, it takes five years.

I think people underestimate how long it takes to really dig deep and really roll around like a pig in mud and achieve mastery over something. So if we think in terms of that hypothetically, if we're working with a client we can invite them to take the longer view. I think that's really valuable.

Lasting Change Takes Time

Robyn: I think so, too. Back to Malcolm Gladwell. What's he trying to do here? He's also got the 10,000 Hour Rule. It really takes 20 minutes to eat breakfast, not 2. He's going to try and transform our world with how much time it takes.

It's interesting because I think he's positioning himself in opposition to the trend that I see, definitely in coach training, which is people want better results faster all the time. In fact, I won't name names but I was researching our competition, as I do from time to time, and I saw a school advertisement yesterday. The marketing language on their website was, "We give you more training hours in less time than any other school."

I read that and thought, as far as I'm concerned that's a nightmare. More hours in less time? How could they think that that's an attractive thing to say?

Andrea: That's ridiculous. I just said this to someone I'm coaching. They're a not-for-profit and we're working on their strategic plan. I said, "It can be any Tom, Dick, or Harry who can come up with a strategic plan that has 101 things on it. It takes a particularly brave, far-seeing, and smart coach to say, 'Listen, a good strategic plan for you or good job search plan (or whatever plan it is you're working on with your clients), these are the only three things I want you to care about next year."

And that's it. That's where the value is.

Robyn: Absolutely. That's where I am constantly challenging myself. I'm one of those people that's got too many ideas. I think they're all great, but that's the thing. You just can't do it all.

In fact, I'm re-reading *The One Thing*, which is a great book about basically that. Just concentrate on the one thing that stands between you and your goals. Doing less is harder. It's much harder to say no to things and just do less.

Andrea: I love it. I'm going to get that book. Is that the one by Gary Keller?

Robyn: Yes.

Andrea: We should trade book reading recommendations. In conjunction, there's a book that I'm reading right now that goes so well with that. Who knew we were reading such complimentary things? It's called *The Power of the Positive No* by William Ury. It was recommended to me by quite a few people but most recently by Androni, a partner of mine who does amazing life coaching work in shelters with women who have lived through abuse.

The Power of the Positive No in summary says what you're saying about the one thing. If you don't say yes to your nos, you will no your yesses.

Robyn: I'm going to have to write that down and put that in the notes.

Year-End or Year-Beginning Coaching

Andrea: Getting back to coaching by calendar, I swear to you, for the last three months of the year I just slough off and coach through year-end coaching. I'm teasing—I never slough off.

Robyn: But you could just do your year-end coaching.

Andrea: "What do you want to get done by the end of the year? What's important for you to leave behind? What's gone well this year that you want to repeat next year?"

That milestone of the calendar really adds vigor. One of the things that I ended up saying and recommending this book was, "What are 25 nos you can say by the end of the year?"

Robyn: I can feel a challenge coming on. This is an issue because we have to make sure this episode goes out before the end of the year.

Andrea: I guess so.

Robyn: We're really stitching ourselves up here.

Andrea: We can say this at the beginning of the year, too. That's the beauty of the calendar. It's such a lovely structure. You can say, "It's the beginning of the year. How do you want it to be different from last year?"

Don't make it 25; make it 10. "What are the 10 things you want to say no to from last year so that 2014 can be different?" It's a powerful coaching question.

Robyn: I think it's a great January question, actually, because that's when I look at those things. You're starting a new year. Let's make it 10 things you can say no to is good.

Andrea: And it can be small. You can say no to clutter in this one spot in the bathroom. You can say no to this one t-shirt that has holes in it and throw it out or turn it into rags.

You can say no to fast food for a year. You could say no to working past 5 p.m. No more negative self-talk. There are lots of challenges you could do.

Robyn: My list is already forming in my head. No more last-minute rush jobs. No more staying up too late at night.

The move to less is interesting. It's quite amazing that everyone seems to be doing that. I wonder if it's in reaction to the fact that there's just so many opportunities now. I think there are more opportunities now for coaches than there ever was before. The marketplace is increasingly global so you really can have a niche that spans many countries around the world.

The technology is so cheap now to get a website, get some marketing happening. And all the tools we've got to carry around with us on a daily basis means we can also work from anywhere. I'm just wondering if because the opportunities are opening up more and more and more and more, that really it does force us to say no and to really focus and simplify what we're doing.

Andrea: I think we're being required to have more discernment where before if you were born at a particular farm on a particular hill in a countryside, the farthest you ever got was the one time the cow got lost. You had to go find it. That was it; you didn't have that many choices. I totally agree with you, Robyn.

That's why I find the calendar is so good. Robyn, have you ever woken up one day and said, "You know what? I'm off-calendar. There's no day. Today isn't a day." That doesn't happen. We're always living inside this thing, this interesting human software called the calendar and this thing called time.

So why not use it as a coach, even if you're a veteran coach? It's interesting to think about how you can give more depth and richness to your coaching. And as a new coach I think you'll really love this. What do you think?

Robyn: I think it's a great thing for new coaches because it's just another structure. And it is that thing like if you're feeling unsure and you don't know what to do, you can always pick up the calendar and look at what's next and ask the client what's next.

Your Preferred Calendar

We can't have a discussion about coaching by calendar without actually talking about your preferred calendar. Come on, now. What are we? Paperbased? Are you doing the synching with the cloud? Where are you?

Andrea: I'm actually one of these polymaths, one of these people who are interested in many topics. For the most part, for business I run a calendar online.

I use Google Calendar. It's actually a fairly complex thing because different businesses have different calendars within Google. Different people run different calendars inside my calendar so my general manager runs the Wealthy Thought Leader calendar and it shows up where I can make myself salivate by clicking on and off the calendar and making appointments disappear.

That's for business. For strategic planning for business I use a paper calendar, one of those big poster calendars on the wall.

For personal, Mike and I share a paper calendar in the kitchen.

How about you?

Robyn: The same. I do the Google calendars. We have that for business. I do synch it with my phone but I've had a bit of a breakdown this last week. I've twice booked myself for a haircut and both times have completely forgotten about it, which is really embarrassing. Poor salon. Right at Christmas.

But the reason it happened is I think something has unsynched with my phone and my calendar. That just shows you how reliant I am on that little beep to say to me in 15 minutes you're doing this. In 10 minutes you're doing that.

What I'm thinking of doing this year is exactly what you just suggested and getting a paper-based one inside. In fact, I was at the chemist the other day—I think they call them pharmacies in other places around the world—and they had these calendars on the front counter.

I asked, "How much are these?"

"Oh, they're free."

"Fair enough."

So I took one and had a look. I sat in the car looking at it and I was so impressed I think I'm going to put this in my kitchen. I've had lots of well-designed, beautiful calendars. Last year we had my daughter's One Direction calendar and we all had to suffer looking at Harry and Liam every month.

So we've had lots of those calendars but the problem I find with them is that the information I need, like when school holidays start and finish, when is Stray Day, when is Melbourne Cup, it's not on the calendars. I have to go and look that up and put it on. This free one at the chemist's is just full of all the fantastic information. So I'm going to use that one. I'm going to give it a try, anyway, and see how it goes.

I'll be one of those people scribbling on the calendar in the kitchen and see what happens.

Just to backtrack a bit, polymath—I've never heard of that word. I'm very happy about that because I like to have new words. So everyone, if you have heard of it good on you. If you haven't, a polymath is a person whose expertise spans a significant number of different subject areas. That would be you for sure. That would be us for sure. There would probably be a lot of coaches.

Milestones in the Client's Life

Andrea: I think the last thing to say about coaching by calendar is you can use milestones in the client's life as well. Let's say you're coaching a mom and her third child, her youngest, is going into full-time school next year. She's trying to achieve something in her life, in her career, whatever. That's a fantastic milestone to use in the calendar with the client.

As you play with this topic I think you'll find there are many more of these kinds of milestones. You might think, *I want to run a marathon before I'm 60. I want to publish a book.* These kinds of things really add a nice big picture structure for coaching. I hope you'll try it.

Robyn: I'm just thinking about how you can use it. You could have your client physically get a calendar and physically write in the things they want

to achieve for the next 12 months. You do that a lot in coaching in the vision conversation, anyway. Often it's a conversation that goes out into the air and that's it. It doesn't go anywhere. It's a very grounding experience to actually get a pen and write your goals in a calendar. I think that would be powerful.

Andrea: I agree and I think that's a perfect comment for near the beginning of a year or anytime, like the beginning of a client's engagement. You get a new client. Talk to them about the calendar. What theme do they want for the month? People overestimate what they can do in a year.

For business-building for a coach I often say, "If we were coaching you right now about how to make your business more successful, you want to have only three or four main things to focus on in business building for a year.

"You might be interested in building up your one-on-one practice in place. That would be one focus.

"You might be interested in creating a new income stream. That might be a second thing.

"You might want a new website. That might be a third thing."

Three to four things and only three to four things. Four might be too many.

I think what you're saying as a tool to actually take a physical calendar and write those in so that it's a daily reminder, I love that.

Robyn: I'm just thinking that I'm going to try this myself. My kids go to a Montessori school. There's a whole thing in Montessori education about connecting the mind and the body in terms of learning. So an example of that would be if a kid is having trouble with writing, like my son was when he was eight, to improve that what they do is get a tray and put sand all over the tray. They get him to trace figures in the sand with his finger.

You might think of this as an activity for the three- or four-year-old but the theory is it's like he needs to feel the letter to have it work into not just his learning in cognitive terms but also in terms of his body memory and connecting the body with the mind.

I'm finding myself thinking about that, thinking about what I normally do. It's all electronic and I just put the goals in, type, type, type. I'm not

touching them at all. They're just in bytes on a screen and then they get shared electronically because we're a virtual company. We don't really have everybody come together.

We don't even pick up a piece of paper like we used to. We used to hold the plan in your hands. We don't do that. We've got so many Web-based apps. We use Smartsheet as a project planner. We've got millions of different projects associated with different teams. Nobody sits and holds it in their hands.

I'm going to try this. Get a pen and write with the pen on the calendar as a way to sort of cement that.

Andrea: Yeah, I think that's a fantastic idea. When I'm coaching this will be an interesting little tidbit. I'm often typing at the same time. When I was a younger coach, I would get in trouble because people would think I was multitasking.

"What are you typing? Are you listening to me?"

I realized that I listen a lot through my fingers. I think that's true of a lot of people. Now I just know to say, "If you can hear me typing it's because I'm taking notes." That makes them feel great.

I think it's very true; I think that's a great exercise. We're getting really nuts-and-bolts and nitty-gritty how-to today. I love that.

Robyn: It's been great. I don't think I've ever heard a coaching podcast on the calendar, so there you go.

NEWS SECTION

I think we can call that section a wrap. I want to get into the news about our new section. I think the two of us do so many things I'm sure people would be interested to hear about. I definitely want to know what you're doing.

Rather than do it before or after we record, let's share some of that with some people. That's my thought there. Let's start with you. A huge event has occurred in your life. You've closed your business, the language school.

Andrea: Oh, I thought you were going to say I got a new pair of glasses.

Robyn: Did you?

Andrea: Actually, I'm happy to share. I guess it's our third business, Oceanside English Academy, an ESL school, English as a second language. We purchased it a couple of years ago and we've just closed.

But I did also just get new glasses, and you know what Robyn? They're my first bifocals.

Robyn: That's so weird because I just had my eyes tested last week and the optometrist said I should get bifocals. In the end, I've gone for the two—one for the computer and one for the reading. You're going for the bifocals?

Andrea: You know, I am going to do that. When I wear contacts—they have these really weird contact lenses where you wear long-vision correction with your contacts and you have to wear reading glasses. I'll be doing that. In Canada they're called by the lovely name, "progressive." People think you're making progress. Your eyes are deteriorating badly and you are making progress with these progressives.

Robyn: Okay, so you've gotten new glasses. That's good. So tell us.

Andrea: We have closed it.

Robyn: Everyone get along to Andrea's Facebook page and have a look at the most beautiful picture essay. I don't know what you're calling it. I've never seen Facebook used like this where you just click through the photos and there's a story with each photo. It's a narrative that goes along. It's really nice.

Andrea: It's one of those milestones. I realized Facebook is very much like a scrapbook. If I post a photo there I know I'll be able to find it, at least until Mark Zuckerberg changes his mind and charges me a billion dollars for it.

We bought this school about two years ago and it was a decision that my husband and I made. I'm a serial businessperson. It's a natural language for me. Mike was looking for a career change. We actually bought the school off of Craigslist—a whole other story.

Robyn: Which cracks me up every time I hear about it. I love the bit where you bought the business on Craigslist. Local business.

Andrea: We bought the furniture off of Craigslist. We got students and we hired teachers off of Craigslist. The whole thing.

The real motivation was to have a business to work on together. Mike isn't involved in my coaching business very much. He's a big supporter and a big fan but he's not involved in the actual running of it. I wanted something that we could run together, was a local business, contributed to the local economy, and got me out from behind my desk, off the phone, and out into the classroom. Out into nature, taking these students out into a real Canadian experience.

It was a great experience but we quickly found that in fact it wasn't for us. What we thought it was going to be, it wasn't. There were lots of great things that happened, lots of joy. So many smiles from those students, really just remarkable. But once we discovered this, when you know better you do better, right?

So we decided to list it for sale. We've been talking to different buyers. We will see as of yet whether we end up selling it or if we just wind up closing it down and winding it up. That's a chapter that's been touching. It's been poignant.

The success of it has been in the quieter winds versus some of the bigger, flashier winds that we might see in other places. I'm happy. I'm happy we tried it and I'm happy we're done.

Robyn: The amazing thing about that story is the wisdom—how it is you knew that this was not working so you were going to move on to the next thing. As you said on Facebook, making room for other opportunities because when you're full there is no room for anything else.

So many people I see just stick at something not working. They just keep doing it year after year after year. I think it's a real skill, the ability to know okay, I think this is not what we thought so let's just do something else.

Andrea: You know Robyn, you're so good at observing these things. I'm so close to it I think I overlook some things. We're really experimental with our lives and we're really lucky to be able to do that. If it's not working, we're the creators of our own lives. That would be really mean to force us to continue.

Robyn: I think it requires a belief that you can be successful at anything. If you have the belief that you can be successful at anything then it's no big deal. You just close it down and move on to something else. But if you have fear around that then I think that's what keeps people in what they know, even if it's not working. Well done. That's very exciting for next year.

The other think I know that you're doing is you're going to India.

Andrea: Yeah. I will be going to India and the exact dates are up in the air today so we'll see. It looks like it will be February but now there's some interesting visa things. Going to India, the experience has already started because apparently you cannot rush an Indian visa. Just like you can't rush a sacred cow once you're in India, you can't rush a visa.

Robyn: Maybe you should do some calendar coaching with them.

Andrea: Apparently, if you try to push then your application goes further and further down. This is very similar to China and different countries too, not only India. We'll see when it happens. I've known that India was waiting for me somehow and I'm excited. It's very much a brand new thing.

You know, I want to hear more about your Learning Leader.

Robyn: The Learning Leader course is an interesting program because it's a short course. It's basically group coaching and facilitation skills for coaches. We've been running it off-and-on for the last few years. We didn't run it as much last year. We took a break because we were doing a lot of evaluating and taking stock and deciding which direction to go.

We decided to run it again and we looked for a while at changing the name. I don't know what you think about it but "Learning Leader," is a bit of a tongue-twister. And what does it mean? Nobody really knows what it is.

The more we looked at it, the more we realized it's the perfect name because it describes our philosophy of teaching and group coaching which is, to be very simplistic about it, the complete opposite of the *I'm the expert teacher and you're an empty vessel and I'm just going to fill your head up with knowledge.* It's actually about *you're the learner here and I'm going to help lead you in the direction that you decide you want to go.*

Of course, it's not that the student has no skills or expertise. It's not just any old person that can go and facilitate our completely student-facilitated learning model. It's not that at all.

As a Learning Leader you're adding value all the time. You're bringing your expertise to the fore. You're really working hard at observing where your clients are at and observing where your students are at and being able to figure out exactly where the next step should be and how you can help support them in that. It really is still teaching and group coaching.

We've just launched it again and we're going to launch it again in February. In fact, we might even do it ongoingly.

The most amazing part of this last program is the caliber of students just blowing me away. When I first saw them and I listened to the recording of the first class, my first thought honestly was, 'Why are they doing this course?' Seriously. They were already trainers; they were already masterful coaches.

As the course has gone on, I've really seen the reason they're doing it. It is because many of them already are trainers or they have a corporate background or they're coaches but the ability to bring those two things together and to create a program where you can integrate coaching or you can have a Coach Approach and to use that program as a way to create business for yourself and to create leads for your coaching practice is, I guess, at the heart of the Learning Leader program.

Andrea: I think of it as coaching or teaching in a circle formation rather than having this triangle pop down, you know, like the leader at the top of the thing and then everybody else is a peon underneath. I love that. It's so unique. International Coach Academy is a leader in this and many other things.

I have to give you kudos, Robyn, because it's hard to teach this stuff. You can't get it just anywhere.

Robyn: It's hard to teach it; it's hard to sell it. It's hard to really get people to understand that there's a lot more going on than just getting a group of people together and starting to teach them.

Interestingly, we had a couple of guest lecturers and one of them was Sally Thompson, who is a friend and colleague of mine from years ago. She's the CEO of Adult Learning Australia which is the peak body for adult learning. She's a bit of an adult learning expert with years of experience in the field.

She toured a class and it was so funny. I was thinking it was going to be really complex and she just opened the class by saying, "You know what? I think it's really important when you're teaching adults to get back to the basics."

She outlined six adult learning principles. I think you can't hear those enough. They're not even rocket science. People can get really fancy and try to do so many things but the basic principles, like learning how to be relevant, you can't be boring or time-wasting—time is very important to adults. I won't go through them all.

I loved that reminder of what it is to teach adults. It went really well and we're going to do it again in February. So that's happening.

The other thing that's going on is our school is growing. I realized the other day that we have 43 staff from countries all around the world. There are so many new students joining all the time. The community is just amazing.

Next year we're looking at how we can provide opportunities for the community to be more self-seeding. You know, to give some tools and get the platform up where our own students can actually create their own coaching groups or create different niches within the school. I think that's the next step for us.

CONCLUSION

Andrea: I'm so excited that we get to play with one another.

Robyn: I know; it's good. It's a great excuse, this podcast, isn't it?

So where are we now? It will be January before we get together again. Are you going away at all?

Andrea: I am. Before January, no, I'll be home.

Robyn: Good. Where are you going?

Andrea: At the end of January I'll be going to San Francisco. We have our new workshop in San Francisco. That will be fun. Lots of new good things coming for the new year.

I want to say thank you to our lovely listeners. It's been really fun getting to know them and know that they're there. More and more of you are listening and we're so flattered.

Robyn: It's great. The comments and emails we're getting—please keep sending them. Next year there's going to be even more CoachStreet coming your way.

So let's go off and start wrapping Christmas presents or whatever we're supposed to be doing.

Andrea: Sounds great. Thanks, everyone.

If you want to become an accredited coach, drop Robyn a line at www.Robyn@coachcampus.com or visit www.coachcampus.com.

If you want to build your own successful coaching business, drop Andrea a line at www.andrea@wealthythoughtleader.com, or visit www.wealthythoughtleader.com.

Did you find this podcast helpful? Swing by I-Tunes to let us know your thoughts.

END OF AUDIO