



PRACTICAL SKILLS GUIDELINES

DESCRIPTION OF SKILL	UNSATISFACTORY	SATISFACTORY
	<i>Observables</i>	<i>Observables</i>
A. Be calm, present, and emotionally available	<ol style="list-style-type: none"> 1. Presents as nervous or agitated at any time during the session. 2. Is often distracted, does not turn off digital devices, does not shut out potential interferences to upcoming session. 3. Does not practice a means for self-calming on a regular basis, such as meditation or breath-work. 	<ol style="list-style-type: none"> 1. Presents as calm at the beginning of a session. 2. Takes time to be physically in place and ready; has dedicated space for coaching. 3. Turns off distracting devices; minimizes external distractions. 4. Practices regular inner-directed technique like meditation or breathing or other means for calming down and directing energy and focus to upcoming session.
B. Show empathy	<ol style="list-style-type: none"> 1. Does not acknowledge client's emotions or state. 2. Responds with off-centered or insensitive comments. 3. Uses humor inappropriately or insensitively. 4. Does not allow pauses or silence when called for. 5. Presents with body language, non-verbal gestures, facial expression and/or posture out of synch with 	<ol style="list-style-type: none"> 1. Reflects and acknowledges client's feelings and/or emotional state with empathetic, nonjudgmental, supportive comments. 2. Matches energy and emotions with warm tone of voice. 3. Uses silence and pauses to stay attuned to client's emotional state. 4. Makes affirming statements using client's language. 5. Offers nods, gestures of understanding. (For phone sessions,

	client's emotional state.	uses brief and warm utterances that convey understanding.)
C. Establish rapport	<ol style="list-style-type: none"> 1. Comments do not reflect or follow client's agenda 2. Makes inappropriate emotional responses. 3. Makes light of broken coaching agreements (i.e., missed appointments). 4. Switches subjects without transition statements. 5. Does not acknowledge client's confusion or lack of connection. 	<ol style="list-style-type: none"> 1. Uses reflective statements to demonstrate understanding. 2. Responses reflect curiosity and nonjudgmental manner. 3. Appears to modulate emotions appropriately. 4. Validates client's experience with comments that show respect and unconditional positive regard.
D. Ensure client's agenda, needs, interests and preferences drive the coaching relationship	<ol style="list-style-type: none"> 1. Tells the client what to do about the topic. 2. Comments do not address or explore client's stated needs, preferences and interests. 3. Comments reflect coach's own view of the agenda/situation. 4. Interrupts client's decision-making process. 	<ol style="list-style-type: none"> 1. Inquiries and reflections facilitate client-centered process that keeps client's agenda, needs and interests foremost. 2. Asks client what knowledge they possess regarding subject before offering information, OR asks client permission to share information. 3. Evokes from client more details that support client's self-discovery.
E. Invite client to select focus of session	<ol style="list-style-type: none"> 1. Tells or directs the client toward a focus. 2. Fails to acknowledge shift in client's dialog or does not explore its intent. 	<ol style="list-style-type: none"> 1. Invites the client to choose area of focus for the session. 2. Elicits from clients how this focus is important to them.
F. Explore the client's vision of optimal health and well-being	<ol style="list-style-type: none"> 1. Does not ask about client's vision of optimal health and well-being. 2. Starts with client's urgent needs without an attempt to tie a set of needs to a broader, deeper vision that could serve as a powerful force for the 	<ol style="list-style-type: none"> 1. Ask questions that assess client's readiness to explore a health and well-being vision. 2. Co-creates with clients a vision that honors their preferences, values, goals. 3. Tracks the clients' insights about vision of optimal health.

	client.	<ol style="list-style-type: none"> 4. Invites clients to summarize the vision and talk about the meaning it holds. 5. Uses mind-body techniques (e.g., relaxation, imagery) to help client access an internal process.
G. Establish long-term goal(s) to be enacted by 3-6 months or by end of coaching agreement)	<ol style="list-style-type: none"> 1. Does not partner with client to plan long-term goal(s). 2. Does not partner with client to make long-term goal specific, concrete, actionable, and realistic. 3. Suggests long-term goal(s) in a directive manner. 4. Does not inquire or help client define what success looks like. 5. Edits long-term goal(s) presented by the client. 6. Substitutes his/her expertise for the client's in setting goals. 7. Does not help client align long-term goal(s) with client's vision or values. 	<ol style="list-style-type: none"> 1. Partner with client to plan long-term goal(s) that are specific, concrete, actionable, and realistic. 2. Facilitates goal-setting that ties client-identified larger vision and values to long-term goal(s). 3. Invites client to consider how lessons learned from prior experience can be applied toward the long-term goal(s).
H. Establish or refine client's short-term SMART goals or action steps for what will be accomplished between sessions	<ol style="list-style-type: none"> 1. Does not partner with client to plan actions steps or short-term goals. 2. Suggests action steps or short-term goals in a directive manner. 3. Does not encourage the client to break down large, complex goals into smaller action steps. 4. Does not receive agreement from client about intended actions between sessions. 5. Does not clear up confusion around actions steps or goals with clarifying questions when client expresses uncertainty. 	<ol style="list-style-type: none"> 1. Facilitates the client identifying client's short-term goals or action steps. 2. Partners with the client to create SMART goals or action steps that fit the client's learning style and pace. 3. Seeks commitment and accountability regarding client's agreed-upon "homework" between sessions. 4. Inquires about the client's chosen method of being accountable for the SMART goal. 5. Approaches goal setting with an "experiment" mindset. 6. Invites client to consider how lessons learned from prior attempts can be applied toward the next action step or short-

	<ol style="list-style-type: none"> 6. Edits plans or goals presented by the client. 7. Substitutes his/her expertise for the clients in setting goals. 8. Does not ask how client would like to establish accountability for the SMART goal. 	term goal.
I. Actively Listen	<ol style="list-style-type: none"> 1. Does more talking than the client. 2. Comments demonstrate that coach fails to listen to the client, overrides their comments, or consistently misses content and intentions. 3. Comments and behavior reveal coach is not attentive to client's speech, content, tone, gestures, posture, and other non-verbal behavior. 4. Responses are not related to what the client is trying to achieve. 5. Interrupts the client to tell the client what to do. 	<ol style="list-style-type: none"> 1. Demonstrates active listening by remaining focused on and responding to what the client says. 2. Maintains eye contact, remains quiet, and acknowledges listening with body language and voice utterances. (If telephonic coaching, uses brief warm utterances (ah, ok) to affirm listening.) 3. Comments reflect an awareness of client's topics or content. 4. Reflections indicate that coach listens at deeper levels to underlying concerns and unspoken issues. 5. Skillfully interrupts repetitive stories from client to keep the conversation forward moving.
J. Ask Open-ended Questions	<ol style="list-style-type: none"> 1. Asks close-ended questions more than half of the time. 2. Asks questions that masquerade as questions, but re-direct the conversation toward what coach thinks is the best solution. 3. Pushes a line of inquiry that the client continues to dismiss or not accept. 4. Asks questions that reveal the coach's hidden biases, including that the client is <i>not</i> the expert of his/her life. 	<ol style="list-style-type: none"> 1. Asks more "what" and "how" questions, minimizes "why" questions. 2. Asks questions that reflect sincere curiosity and evoke client's beliefs, attitudes, values, and intentions. 3. Asks clear, direct open-ended questions to evoke client's stories, images and feelings to access a deeper level of reflection. 4. Asks questions that are an appropriate mix of information-gathering questions and insightful questions.

<p>K. Help client explore and articulate values, sense of meaning and purpose</p>	<ol style="list-style-type: none"> 1. Tells client what his/her strengths are and sidesteps process of self-discovery for client. 2. Does not ask about the client's strengths, values or beliefs. 3. Informs client how to use their strengths or what goals to pursue. 4. Does not ask about meaning or purpose of client's intended pursuits. 	<ol style="list-style-type: none"> 1. Asks questions and offers reflections that support client's self-discovery of values, meaning and purpose. 2. Offers reflective statements and summaries that tie client's values and strengths back to client-directed goals and desired outcomes. 3. Offers curious inquiry about the discrepancies between what client says, their values and beliefs and their actions without judgment or blame or evoking defensiveness or resistance.
<p>L. Anticipate, plan for, and help client navigate challenges</p>	<ol style="list-style-type: none"> 1. Gives client a plan for action to navigate challenges. 2. Does not bring up topic of potential barriers or challenges with client's action plan. 3. Does not address client indications of hesitancy or lack of readiness or confidence to pursue plans. 4. Rescues the client whenever client is uncomfortable or struggling. 5. Tells the client how to "fix" the problem. 6. Does not brainstorm when client appears stuck. 	<ol style="list-style-type: none"> 1. Invites client to forecast challenges and barriers. 2. Partners with client to co-create plan to navigate challenges with identified steps and timeline. 3. Explore ambivalence and competing commitments. 4. Brainstorms potential solutions as appropriate.
<p>M. Explore broader perspectives and inspire interest in new possibilities</p>	<ol style="list-style-type: none"> 1. Does not explore different perspectives, or expand choices, options and pathways. 	<ol style="list-style-type: none"> 1. Helps the client integrate new awareness by engaging in problem solving. 2. Offers different visual tools or cognitive exercises (body scan, imagery, decisional balance) to create generative moments or opportunities for insight. 3. Invites client to take a sky-high view and expand awareness

		beyond the immediate goal or situation to a broader perspective.
N. Share information	<ol style="list-style-type: none"> 1. Provides information, gives advice and makes recommendations, without permission or prompt from client. 	<ol style="list-style-type: none"> 1. Asks permission when sharing information or recommendations, or provides information when specifically asked to do so. 2. Stays within scope of practice when information sharing.
O. Discuss and honor client's preferences for self-monitoring	<ol style="list-style-type: none"> 1. Fails to mention tracking or self-monitoring after action planning or goal-setting conversation. 2. Suggests forms of accountability that sound parental in nature, or do not connect to client's stated agenda and desired outcomes. 	<ol style="list-style-type: none"> 1. Asks clients how they would like to be accountable and support clients in selecting specific accountability methods. 2. Asks clients how they would like to track (self-monitor) their agreed-upon behavioral actions.
P. Facilitate process of self-discovery, learning and insight	<ol style="list-style-type: none"> 1. Provides the solution, knowledge or insight without exploring the client's awareness of subject. 2. Does not invite the client to share their own answers, learning, insights and solutions. 3. Does not inquire about client take-aways at end of session, or summarizes what the client's take-aways should be. 4. Offers responses that are unrelated to what the client is trying to achieve. 	<ol style="list-style-type: none"> 1. Invites client to reflect and gather insights about what was learned in prior attempts, and apply that learning going forward. 2. Positively reframes setbacks as learning opportunities. 3. Offers decisional balance work (explores pros and cons), if needed. 4. Invites client to share "take-aways" at the end of the session. 5. Affirms the strengths and values the client used in what was accomplished or learned. 6. Asks how the client intends to celebrate accomplishments.
Q. Prompt for, and amplify positive	<ol style="list-style-type: none"> 1. Does not ask about positive resources. 2. Does not ask client to consider identified 	<ol style="list-style-type: none"> 1. Affirms and acknowledges successes to date. 2. Asks about or acknowledges client's strengths, qualities, effort

<p>resources (including past successes, qualities, strengths, and skills)</p>	<p>strengths, qualities or skills.</p> <p>3. Fails to acknowledge client's strengths, qualities, effort or skills.</p>	<p>or skills.</p> <p>3. Invites client to recall values or vision.</p> <p>4. Facilitates client's identification of strengths and supports how those strengths can be used.</p>
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