# coach accountable's

# Boisterous Guide

## to being coached with

# coachaccountable

Get totally engaged in the process of being coached, follow through on your big plans like a pro, and reap the wins and results you seek.

Make the most out of the time and/or money you're spending on being coached.

# Forward

*by John Larson, creator of CoachAccountable*

Hello!

Chances are you're reading this as part of your preparation to get the most of out of being coached, OR because you're considering being coached and you want a sense for how it promises to be, for you, seriously beneficial business.

Either way I welcome you, and I want to open with a small thank you. I don't know what you're going to be coached in, but your choice to work at--and be supported in--your own growth is the stuff of making the world a better place, and for that I appreciate you.

I say this with utter sincerity and no exaggeration.

I've written this guide for you, the person who will be coached using the supporting tools of CoachAccountable. The nuggets of guidance I have for you are based on months of working with the people I coach, and consist of strategies and habits which have turned out surprisingly effective in keeping progress moving along. May our discoveries benefit your own process as you get underway.


All the best in your coaching relationship and beyond,

John Larson

# How to Use this Manual

Here we have 26 pages to wade through, but never fear.

I recommend that you first click around your CoachAccountable client account to get a sense for what's being talked about here. Perhaps create an Action or two and maybe even set up a Metric, and *then* come back to this manual. After 3 minutes of playing around you should feel right at home with what's discussed in the pages to follow.

This guide is broken into two parts: **Motivation** and **Mechanics**.

**Motivation** covers the **why** of using CoachAccountable's tools, including the reasoning, mindset, and practices that will enable you to get the most out of being coached, and is divided into a series of essays which you can visit in any order. It should work well for you to pick one that sounds most interesting from the table of contents below, and then jump around as your curiosity takes you from there. I do think your coach will appreciate you getting around to each of the sections before too long.

**Mechanics** goes into details of **how** to configure and use the tools, and reads (slightly) more like a nitty-gritty technical manual by taking you through the main features of CoachAccountable one by one. You can click into whichever feature you feel you could use help with, and it might be that you may end up skipping the whole thing entirely. I'm okay with this.*

*I hope to make this fun for you, both in these pages and while you're logged in.*

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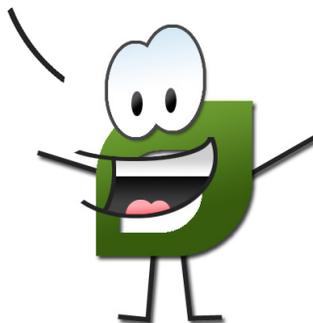
*  *Especially because that would imply I succeeded in making the software intuitive enough to use as is.  Sweet!*

# Contents

# Introduction:  Why Software At All?

I'm delighted you asked.

If you haven't experienced this already, when you get down into being coached you will find it's the stuff of having you stretch and challenge yourself in ways that are not yet natural to you.  You'll be regularly getting new insights, ideas and clarity from your coach, and then regularly putting that new stuff into action.  Commonly there will be creating an action plan, and then following through on it, and then reviewing how it went.

Now then, by default all these insights, actions, and things to follow through on comprise quite the collection of information for you to keep track of.  (We know this because NOT keeping track of these things means insights fade, actions get forgotten or confused, and follow through just doesn't happen.  Sound at all familiar?)

Managing this information becomes doubly difficult when you consider the importance of keeping your coach in the loop about how things are going (important because knowing how things are going is one of the keys to effectively guiding you).

This is the crux of why software: CoachAccountable is going to serve your coaching relationship as the way to capture the insights, record the action plans, assist you in the follow through, and let your coach see how things are going.

*As little as 10 minutes spent setting up CoachAccountable is all it takes.*

In the rest of this manual you're going to learn how even as little as 10 minutes spent setting up in CoachAccountable by you and/or your coach is all it takes to have yourself supported for the coming week (or weeks) as you take the coaching to cause real results in your life.

By supported, I mean:

- Wisdom from your coach will be recorded and available for easy reference later.
- Your actions will be clearly planned and unambiguously ready to be carried out.
- Your goals will be set up and ripe for regular tracking with minimal effort.
- Reminders will be in place to keep you moving forward as the days go by.

With the aid of CoachAccountable your progress will be more rapid, your results more tangible, and your experience more fun. Read on and I'll explain how.

# Keep it Green

Compare these two sets of actions:



The one on the left is (and I hope you'll agree) rather a bit nicer to look at. It's like looking at a report card with straight A's rather than one containing letters from all over the (early) alphabet.

I invite you to consider the mindset that, if your Actions tab looks like the one on the right, *you are doing it wrong*. And NOT in the sense of "You're a bad person because you're regularly late in getting things done". No. You will do as you do and that's okay-- coaching is meant to stretch you so acting on it is often going to be a challenge.

Instead, what I mean when I say you are doing it wrong is that you're using Actions in a way that is *not serving you as well as it could*.

So what does it mean to have Actions serve you as well as they could? Simply this: keep it green.

Green means on time. Deadlines pass with actions uncompleted, yes, but slipping into lateness means a certain degree of being asleep at the wheel. Instead of allowing that to happen (which, over time, creates a nasty sensation in at least some parts of your brain that "following through on my actions doesn't matter" and/or "I suck at getting things done"), adopt for yourself a policy that you keep your Actions in the green.

*Deadlines pass, yes, but slipping into lateness means a certain degree of being asleep at the wheel.*

How? Well I'm not going to say by simply doing all your actions on time*. In reality distractions comes up, things change or reveal themselves to be more difficult, and so forth. So let us not pretend they don't.

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* *Because that boils down to wagging a finger at you and saying "just be a better person", and if **that** worked, all of coaching would be way easy and we could all go home.*

Here's what you CAN do:

• **Set reminders.**  Don't let deadlines just slip by your awareness, know about what's coming up with reminders.*

• **Re-promise as needed.**  A due date for an Action is more or less you making a promise, that *I will complete such-and-such by this date***.  It's Tuesday and you have an Action due Friday that you know you're not going to be able to finish?  Pop in and change the due date to something you can stand behind.  Timely reminders will help you to call this sort of audible as early as possible.  And I promise you: the experience of doing this well BEFORE a due date has passed is very different from doing it after.  It's like rescheduling a meeting with someone 2 days before versus 2 hours after it was supposed to start.  Try it sometime; you'll get very different reactions.

• **Re-tune the level of your ambitions.**  A lot of red and yellow in your action plan is a healthy hint that *maybe* you are regularly biting off more than you can chew.  "But isn't it good to be ambitiously taking on more things?"  Ostensibly, yes.  But it turns out that as you over-promise and under-deliver, you gradually chip away at your sense of effectiveness at accomplishing things,

and nothing kills productivity in a given moment quite like knowing yourself as a worthless slouch.  Re-tuning your ambitions amounts to making more responsible promises regarding what you'll do.  Maybe you make fewer actions and maybe you give yourself more generous deadlines.

Taken together, these 3 strategies should enable you to always be on time with your action plans.

Finally I'd like to point out that yes, you *could* make actions with super far out due dates, or push due dates back after the fact, or mark actions complete earlier than they were actually done, all just to be on time. But take this seriously for your own benefit, **don't do it to impress CoachAccountable**. Just having a sea of green on your Action tab isn't what matters.  What matters is the process of responsible follow through which got you there.

*I am, after all, just a piece of software written by some dude.*

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\* For more on how to set them effectively, see "Timely Reminders and the Boy Who Cried Wolf" later in this manual.
\*\* A promise to whom, CoachAccountable?  No.  Your coach?  Maybe.  Yourself, as in your happiness, success and all you are committed to?  **Yes.**

> Make a plan you intend to actually fulfill on and take your due dates seriously.

## Don't Spam Your Coach

I don't want to alarm you with some sort of big brother concern, but did you know your coach gets an email the minute one of your incomplete actions becomes overdue?  The heads-up serves as an opportunity to step in and offer assistance in case you might be stuck, so it's a good thing.

Still, you might want to minimize the number of emails like that which are sent.
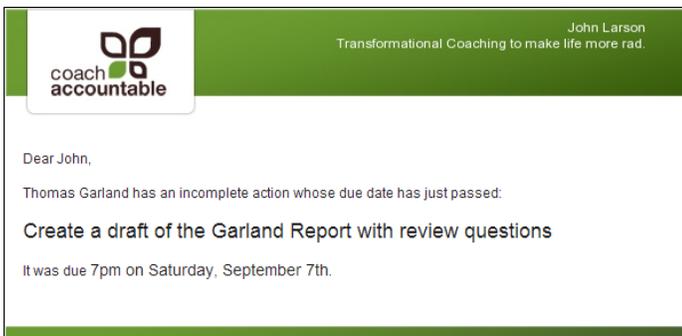


## To Cancel or Delete?

When it comes to Actions that you're just not going to do, CoachAccountable gives you two options: canceling or deleting.*



When it's an Action you just created and suddenly realize something like "wait, that's not the right thing to do right now", then deleting it is fine.  Chalk it up to essentially being a typo, no need to have that clutter your history of actions.

But when it's an Action you've had around for a while, one which you seriously intended to do but now things have somehow changed?  It's probably better to cancel it, and even better to leave a little comment about why.  Doing so has your actions history tell a more complete story about what's working and what's not.

*Technically I suppose it gives a third option: mark it complete even though you didn't do it.  But again, that's just silly.*

# Beware the Red Triangle of Despair

You may already know this, but Metrics have a handy way of illustrating how things are going relative to a target. If you're on the happy side of the target value, the area which separates target from actual is shaded a happy green. Likewise, if reality is falling short of the desired outcome, the difference is shaded in red.

Now then, sometimes you have an aim to build towards some goal in a cumulative fashion over time, yet no progress is being made. Your metric is apt to look something more like this:
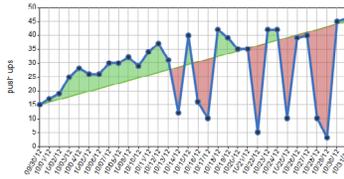
Here there is an instance where setting a goal is counterproductive, it would actually be better to have not set up a Metric at all*. When you start to see a red triangle being gradually built up over time, take time out to examine the situation.

*Every day that goes by with no forward progress makes the gap between reality and goal wider, often leading to a downward spiral.*

**Pages on my book**
Tracking pages writtens from August 1st to September 1st, starting at 0, goal is 62.

Add new data point for 8/30/13  0  pages more
Ugh...  Add

*What, me demoralize? Ack!*

I call this the "Red Triangle of Despair" because every day that goes by with no forward progress makes the gap between reality and goal wider, often leading sooner or later to a downward spiral called "Ugh, this is hopeless so why even try."

*  After all, there is a certain demoralizing quality about a machine prompting you, on a regular basis, to enter in yet another zero.

Chances are one of three things will be the case:

• **The goal is realistic but there are no actions in place to make it happen.** Work with your coach to plan out actions that will get you back on track, and then take those actions seriously.

• **The goal is actually pie-in-the-sky given how things are right now.** That's okay; just recognize that you made it up so you can always make up something else. Revisit your expectations and come up with a target that is more in line with reality, something that gives you a game at which you have a fighting chance.

• **The goal is realistic to catch up to but only after something else happens.** Call it Magic Turning Point X (for example sales, and X is you getting the marketing materials together in order to properly tout what you're selling). In this case make the Metric begin only after X occurs, so that you don't have this looming goal putting undue pressure on getting X right. And perhaps, assuming X is something you control or are working towards, you create a metric called "Progress towards X happening" measured as percentage points from 0 to 100. This again gets your focus on playing a game that you can make immediate progress towards.

If you're facing a Red Triangle of Despair, look for yourself to see if one of these situations applies to you, and then work with your coach to remix the situation into a more empowering one.





*You might also wish to beware the "Trapezoid of Late Beginnings" and the "Catch-Up Triangle"*
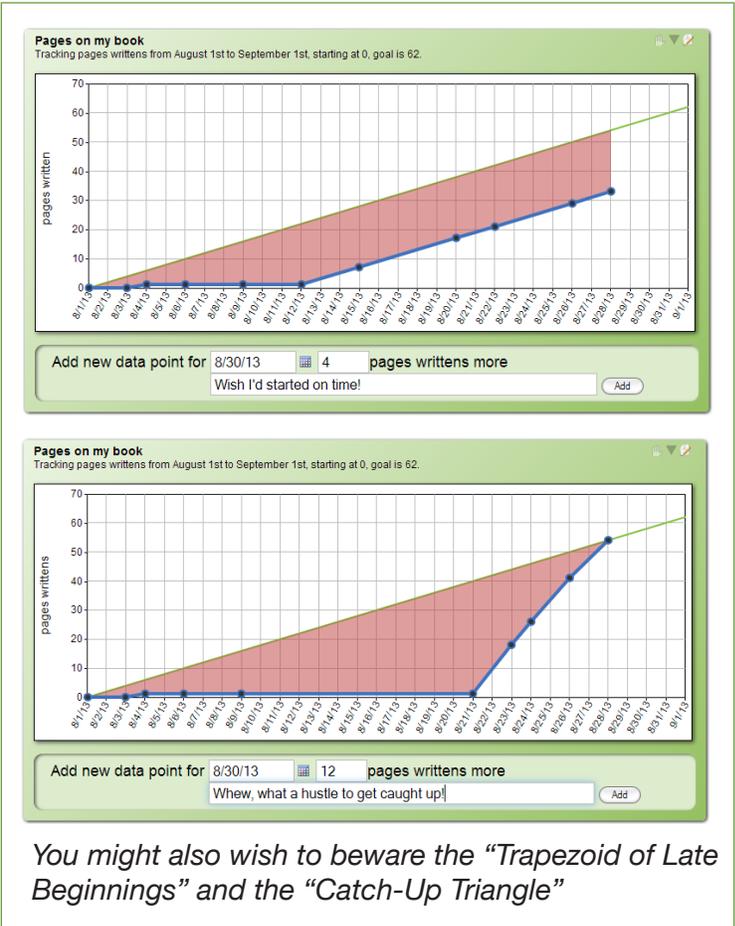
Have goals that are realistic, and adjust if they're turning out otherwise. Always be progressing towards whatever you're working on.

# Timely Reminders and the Boy Who Cried Wolf

One of the most powerful tools you have at your fingertips is the ability to set reminders for yourself.  This is the opportunity to take your destiny into your own hands during the days *between* coaching sessions.  In collaboration with your coach you've most likely created an action plan to play at until you talk next, and setting reminders for yourself is how you say "*Yes*: the ball is in my court and I'm going to ensure I get these items handled."

As you are no doubt aware, life comes up and inspiration fades.  These are but two reasons why you might lose track of your action plan, the doing of which generally represents going above and beyond the usual to stretch and grow yourself.  So set timely reminders as a way to keep what is important to you in your attention.

By "timely reminders" I mean reminders that you'll receive at a time when you can *act on them*.  Say there's a little 3 hour project for you to finish before you talk with your coach next Tuesday.  You could push it until Tuesday, but you'd like to have it done over the weekend, when you've got time to work on it.  Sunday would be a good day for it.

So make it due on Sunday at, say, 8pm.  Then set reminders for 2 days before (i.e. Friday at 8pm, to remind you to keep some time free this weekend), and another 12 hours before (i.e. Sunday morning, reminding you to take time today and get it done by this evening).  Compare these reminder times with, say, 3 days before and 1 hour before.  At 3 days before the due date it's Thursday night, when you're not yet planning to work on it and you're more liable to forget again before the weekend.  At 1 hour before it's probably too late if it's not started already.

Due By: 9/15/13 at 8:00pm

Remind me 2 days before via email    remove
Remind me 12 hours before via email    remove
Add Reminder
Optional comment.

This is the little strategy to setting due dates and reminders: aim to have CoachAccountable give you a little tap on the shoulder at times when it is most useful to you in the moment.

The worst thing you can do with reminders is have them arrive at a time when your immediate reaction is something along the lines of "Yeah, yeah, but I can't do anything about that *now*."  Then the reminder system becomes a nag without providing any benefit.  Skip through enough messages like that, and before you know it, like the boy who cried wolf, CoachAccountable reminders and alerts will live for you as being extra noise to filter out, meaning you'll ignore them when they would otherwise be genuinely useful.

> Set reminders for yourself such that they count, and they'll live for you as handy godsends which nudge you to your own personal greatness.

# Emotionally Invested

You would be surprised what taking a little time on your own will do to up your emotional investment.

Emotional investment in what? **In your own personal success and results.**

Though super counter-intuitive, you being emotionally invested in your own success is NOT automatic and thus NOT to be taken for granted. Sure, it's your own success, and so what could be finer insofar as you are concerned, right? But it turns out that a vision and action plan for your triumph generally start out, by default, in the "Hey yeah, I guess that would be nice" realm, which is, in fact, a far jaunt from the "YES, I want this and I am going to make space in my life to pursue it" realm.

More often than not, you will be attuned to a vision for elevated awesome in your life immediately following your coaching sessions. That's one of the main purposes of your coach: to get you aware of (and excited for) what could be, and clear how to move forward. But remember--until you begin to genuinely run with that sparkling vision in earnest, it will live in the "I guess that would be nice" realm.

So take a little time to get yourself emotionally invested. Fresh off of a coaching call wherein you've devised a plan to work at for the coming week? Then strike while

the iron is hot: take a 5 minute timeout to write up your thoughts about the plan, any concerns you might have, what fulfilling on it would mean, and how you're going to go about doing so.

**Write a Journal Entry**                                    **X**

Title: Reflecting on Product Creation

**B** *I* U  Paragraph

It's strange to think that in my very beginner state as a web programmer that I might actually come up with a product that I could sell. Still, this is a very enticing thing for a number of reasons:

1. My network is pretty limited for getting freelance gigs
2. Having a project that I can be really passionate about and evolve for the long haul sounds great
3. Selling a product scales much better than selling my hours

In my last 3 years in the non-profit world I've seen tons of inefficiencies and pain points that would actually be pretty easy to solve with software. I'll take two hours this weekend to list those out, and go from there. I'm excited to think I might fast-track this whole process.

☐ *Make this entry private, for my eyes only.*

( Save )   Cancel

The act of you doing this creates in you an emotional investment, one that will see you through to fulfillment. Do this as a Journal Entry to have it automatically shared with your coach, further enabling him or her to support you.

*Good ideas are nice, but don't cause things quite like steely determination.*

> After a session, take a minute to think about and write up your newfound clarity. This will turn good ideas into actionable commitment.

# Make Observations in the Laboratory of Your Own Success

A lot of the work you will do in your process of being coached will amount to exerting effort and noting the results.  With a Metric or two you'll be able to track how things are going over time, for they will cause you to specifically measure the results you get on a regular basis.

Here's the thing: it's not just about the numbers.  In the moment you're recording a number, you have, fresh in your head, the story behind that number.   Whether you had a great week, a rough one, or anything in between you know in that moment the "why" behind it: what really worked, where you got stuck, or even the details pertaining to your mood and motivation.
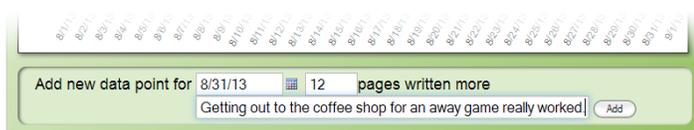


It may seem trivial to do so, but take a moment to observe what led to the result. It might be clear as can be in a given instant, or it might take some 30 seconds of introspection.  Either way be sure you have some nugget, a one- or two-sentence blurb,

which tells the story of your progress at this particular step.  Then add that blub as a comment about that result as you report it.

The magic of doing this isn't in the moment (though it can be, if that pause for insight leads you to a deeper awareness of what's working or what's not).  Rather it's in the story that gets built up over time.

What's fresh on your brain in the moment won't be two months from now, and being able to look back over a series of observations paired with your numbers will reveal patterns which give way to insights:

• One-time flukes of success can be turned into repeatable processes.
• Common pitfalls can be turned into predictable things made easy to avoid.
• Ultimately, what you're capable of and how to accomplish it comes into focus.

Even if you don't consider yourself much of a scientist, every day that you record a progress point counts as another experiment in personal accomplishment.  Make observations and, with the aid of your coach, learn from your accumulated awareness.

> Add comments with your Metric data points.  Doing so will provide immensely valuable insight as your progress unfolds.

# Sow the Seeds of Conversation

Throughout your coaching relationship, you're going to talk with your coach on some sort of regular basis, right? Those conversations are your chance to get focused insight and expertise about what you're up to, so you may as well get as much out of them as you can.

By posting comments and journal entries, you can clarify your wants in coaching in a number of ways. The following make great fodder for coaching conversations:

- Areas in which you are struggling
- Questions regarding things you wish to learn more about
- Ideas which you are curious about exploring

So as you go through your days prior to your next coaching call, leave the occasional comment or write the occasional journal entry about things that matter to you. It all goes into a record that your coach has access to, and most likely will be reviewing right before your next session.

By giving your coach a little window into what you're working on or are interested in, you sow the seeds for a great next conversation, one in which you'll be able to dive right into the things you care about most.

## Wonder Out Loud

One of the best kinds of remark to share with your coach is musings about what might be. Remarks that begin with "What if I..." and "It would be amazing if..." and "I'm curious about trying..." all tend to spark inspired explorations and lead to worthy new approaches.

Your coach is listening for your ambitions, so make them heard. He or she may be more able to guide you in getting there than you know.

10/23/12  8 days ago at 9:12am

### L'académie française

I haven't had big hairy audacious goal in a while.

I would like to become a member of l'Académie Française, the most élite group of defenders of the French language.

I do not know how this is possible - but I would like to find out how it's impossible, and break that.

Comment or journal about whatever is on your mind, because doing so sets up your coach to support you on the very things that are important to you.

# Self Direction

This may or may not be appropriate for your coaching situation, but sooner or later you may find yourself in a place where you could actually come to a coaching session with your own action plan already made up. Why would you do that?

If one of the key aspects of coaching is coming up with action plans, then similarly fundamental is a deep dive into the tactical side of those plans. If you come prepared with an action plan already laid out, there's more time for your coach to help you refine your approach, work out ways to overcome barriers, and lend insight on how to execute for maximum win.

If you don't know where to begin making an action plan in a given week, that's totally fine: your coach will happily work you through the process as usual. But if you have even a hunch of what to tackle in order to keep moving forward, put in an Action or two. It'll set you up for even more focused guidance.

## Just Plain Showing Off

CoachAccountable makes your performance, follow through, and results super visible to your coach (and to you!).

At some point, you might find yourself delighting in having an action plan color coded in all green, Metrics that are all on track with worthy targets, and being

generally on top of things while driving further accomplishment.

Let us call this "showing off" for short.
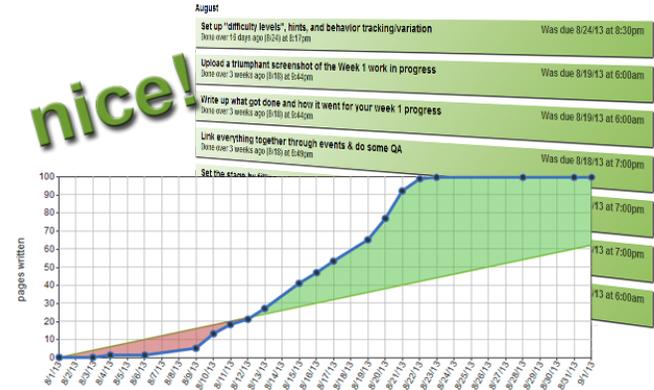


When your performance is there to see by someone who is not you, showing off becomes possible. In the context of your decidedly supportive coaching relationship (wherein your success is of primary importance), showing off is completely appropriate and even most welcome.

So feel free to do it. Impress your coach. And not for the sake of impressing your coach, but because of what it means for YOU. Because when you impress your coach, something is going VERY, VERY right in the pursuit of your own goals.

*Forget what you were told as a child in this instance: shamelessly flaunt your awesome.*
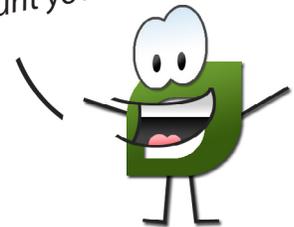
> The further you can take yourself on your own, the further you can get with your coach's support.

# If You Don't Record it, it [Almost] Didn't Happen

Between Actions for the things you complete and Metrics for the results you obtain, CoachAccountable documents the lion's share of what you accomplish within your coaching relationship.  I invite you to consider that recording as much (i.e. marking Actions complete and regularly reporting your Metric numbers) is a vital part of such accomplishment happening at all, and this is for 3 reasons.

**First**, keeping the state of what's-so up to date within CoachAccountable makes it possible for your coach to keep up with your progress on a regular basis.  This allows your coach to give you better and timelier feedback and support, including well-deserved congratulations now and again.

**Second**, recording these things is great for your own personal satisfaction and clarity.  Marking an Action done lets you put it to rest in your brain, making more space for what's next.  Reporting a Metric number makes the result real and official, giving you a moment to celebrate the win and/or ponder how to improve for next time.

**Third**, you're creating a record for the ages.  This might not be obvious beforehand, but I promise you that having records of your completions and results is not only delightful, but downright useful as well.  A concise, easy-to-review account of what you've gotten accomplished during a weeks--or

even months--long span of time serves as powerful & compelling evidence for your effectiveness.  Few things will convince you how far you can go quite like seeing how far you've come.

When you make a record of an accomplishment or a result, it takes on a certain realness.  Otherwise it likely fades from memory, into the oblivion of just a bunch of stuff that happened months (or years) ago.

## Document Your Successes

When something really worked, take a moment to journal about it.  As journal entries are shared with your coach, this is your chance to brag to your audience of one.   A brief note about the win, written for your coach to read, will help you crystallize your thoughts regarding your success.  You'll be surprised how often doing this reveals insights about what you could do again to enjoy repeated successes.



Recording progress makes it real: satisfying today, insightful tomorrow, inspiring over the long haul.

# Inspiration at Your Fingertips

As you continue work with your coach within CoachAccountable, an ever growing trove of wisdom and insights will gradually emerge, one that is tailored JUST FOR YOU.

Session notes, comments, and other forms of feedback all constitute nuggets of wisdom handed down from your coach, and captured for you to review at any time. Take advantage of this. Once documented, the inspiration and clarity you get by the end of a typical coaching call is yours to revisit.

When you're stuck or could otherwise use some of that good stuff, the answer may lie in simply reviewing the notes from earlier work. That way, your coaching relationship can build upon itself at an ever quickening pace, allowing you to grow and take on ever bigger things.

*Documentation for just the sake of formalities is silly. The records I keep can serve you much more, like your own personal strategy guide.*

The records which accumulate make up a personalized stash of self development goodies, so take advantage now and again.

# Not Just For Your Coach

The tools of CoachAccountable are first and foremost concerned with you getting the most out of being coached.  Yes, the actions, metrics, journaling and so on will largely be directed by (or otherwise stem from) the work you do with your coach, but please feel at home to set things up to support yourself in whatever's important to you.

Want to take advantage of the reminders you can set for some other things on your to-do list?  Go right ahead and set up a few Actions to support yourself.

Got something else you'd like to track over time with a Metric?  Set one up and make your own game with targets to play for.

Want to journal out your thoughts on something not directly related to your coaching program?  Feel free, your coach might even lend insight into whatever it is you write about.

If it helps you to get things done, grow as a person, or otherwise makes your life better, I promise your coach will be delighted by your use of the system.

*At your service. It's pretty much why I exist.*
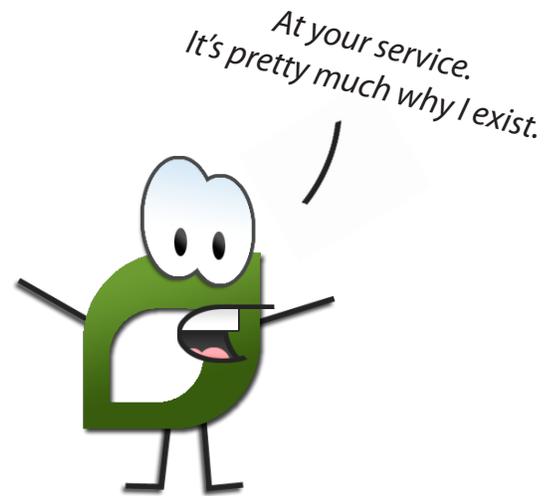
Make yourself at home and use the tools provided to serve you however they can.

# Mechanics

The fundamental building blocks of a coaching relationship, as structured by CoachAccountable, are:
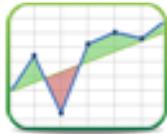
**Metrics**

**Session Notes**

**Shared Files**

**Journal Entries**

**Worksheets**

**Actions**

**Comments**

Here in **Mechanics** we're going to look at each of these in turn, cover the basics of what everything means, learn how to setup and use each, and reveal a few non-obvious features as well.

*You may never need to consult the pages that follow, but you may learn a few handy tricks if you do!*

# Managing Actions

Actions are like your to-do list of how to progress and grow through your coaching relationship. They can either be assigned to you by your coach or you can create them. Actions consist simply of the "what" and the "by when":

Action:    Make a nice image illustrating an action
Due By:  9/13/13    at  7:00pm

To help you keep up with your action plan, you can set as many reminders about it as you like:

Remind me  2   days   ▼  before via email   remove
Remind me  5   hours  ▼  before via email   remove
Add Reminder

Note how, by default, reminders are available via email only. CoachAccountable can send you reminders via text as well in select countries. If you're in one of them, adding your cell number on your "My Account" page is all it takes to give you the option.

Remind me  2   days   ▼  before via  email  ▼  remove
                                      email
                                      text

**Tip:** Reminders are set relative to the date the action is due, e.g. 2 days before or 5 hours before. Hopefully this won't be the case often, but if you think you'll be late in completing an Action you can actually set reminders for after the deadline.

Do this by setting the reminder a negative number of hours/days/weeks before. It sounds weird but the math actually works out: "-2 days before" means, to a computer, the same as "2 days after".

Due By:  9/13/13    at  7:00pm
Remind me  -2   days   ▼  before via email   remove

Finally, when setting up an action you can add an optional note. This is a good place to put any clarifying bits about the action, including your game plan for execution or pertinent motivation.

All told, setting up an action looks like this:

**Plan an Action**                                    **X**
Action:    Make a nice image illustrating an action
Due By:  9/13/13    at  7:00pm
Remind me  -2  days  ▼  before via email  remove
Remind me  5   hours ▼  before via email  remove
Add Reminder
I think having this will make folks really comfortable with setting up their own actions, which is nice because then they'll do it more often and stay more on track.
                                    ( Create )   Close

Once created, a new action goes right into your list of things to do:

Make a nice image illustrating an action      ( Done )
Due on Friday (9/13) at 7:00pm

Your coach also gets an email notification of your new action, and with it can quickly give you feedback.

Reply ABOVE THIS LINE to add a comment.

![coach accountable logo]                John Larson
                        Transformational Coaching to make life more rad.

Dear John,

Johnny DeCoachee just planned a new action:

Make a nice image illustrating an action

It is due 7pm on Friday, September 13th, or 3 days from now.

I think having this will make folks really comfortable with setting up their own actions, which is nice because then they'll do it more often and stay more on track

By viewing the Action on the Stream tab you can also leave comments which go right to your coach, making it easy to strike up a supportive dialog if you need it.



You can modify an Action, including changing its due date and setting more reminders, by clicking the little edit icon next to the "Done" button.



**Tip:** If you've got something you're aiming to do, say, every day this week, instead of creating 5 nearly identical actions try setting up what I call a "pseudo-recurring Action".

Create one action to do that thing 5 times, make it due on Friday, and then make a reminder 1 day in advance, 2 days in advance, 3 days in advance, and so on.  That way the system can give you a reminder every day, prompting you to do it each of the 5 days.  Be sure to set the due time smartly to have the daily reminders fire off at an opportune time.  This is a great way to instill good new habits.

## Marking Actions Complete
## Via Email

The basic way to mark actions complete is to click the big "Done" button next to the action. But this requires you to be logged in to CoachAccountable. You can also mark actions complete on the go by replying to reminder emails and texts.

The email itself gives hint on how to do so:

Reply "done" ABOVE THIS LINE to mark this action complete (plus optional date done and comment)

John Larson
Transformational Coaching to make life more rad.

Dear John,

This email is to remind you that the following action is due on 9/13 at 7:00pm:

**Make a nice image illustrating an action**

If you have completed this action, mark it done by replying to this email, or do so on your client page.
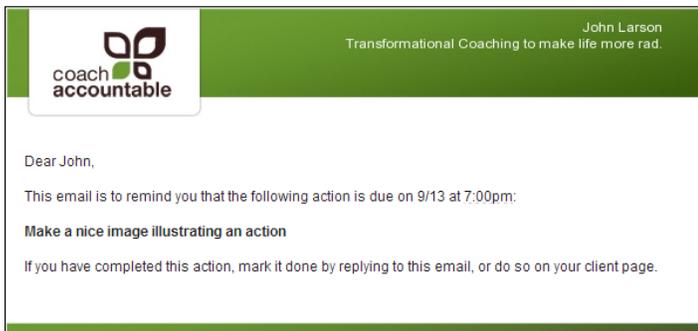
So you can mark it done as of right now by replying to the email with the following:

> Done.

You can optionally indicate when it was done, like so:

> Done.
> Yesterday at 5pm

> **Tip:** You can also cancel an action by replying with "cancel" instead of "done". You can add a comment when canceling this way.

You can optionally add a comment on a new line:

> Done.
> Yesterday at 5pm.
> That went really well, can't wait to tell you about it.

## Marking Actions Complete
## Via Text

Marking an Action complete by replying to a text works similarly, but because texting is a little more primitive you can't supply the date it was done. So your replies will look like:

> Done.

Or

> Done. That went really well, can't wait to tell you about it.

> **Tip:** Want more examples of how to mark actions complete? Just reply to an action WITHOUT a recognized "done" or "cancel" command and you'll get a friendly email in reply which explain things in greater detail.

# Tracking Metrics

Metrics allow you to track your progress in terms of real numbers.  When you do this regularly over a non-trivial span of time (say, 2 weeks or more), magic happens: patterns become apparent, insights are revealed, and progress (or lack thereof!) is tangible.

Metrics are powerful and flexible, and make this kind of regular tracking a cinch.  Still it can be a little intimidating to set one up the first time.
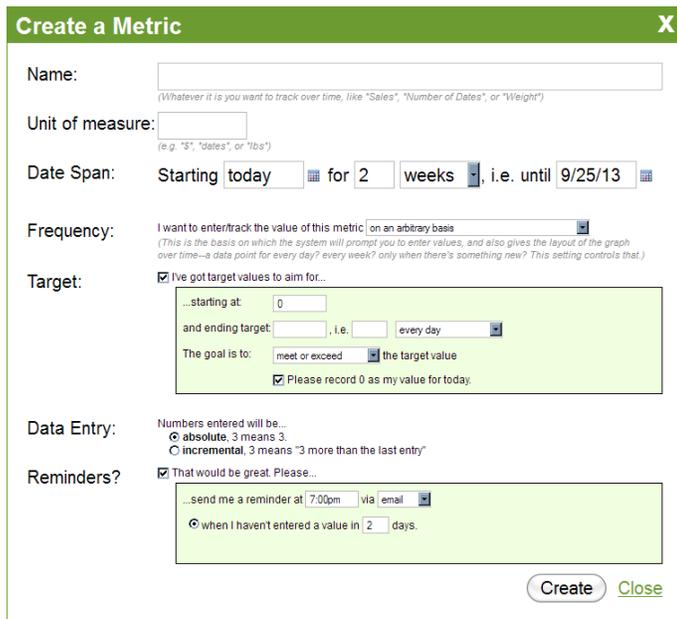


Quite a lot at first glance, so let's break this down one heading at a time.

**Name:**  The name of the Metric should be a meaningful-to-you label of what exactly it is you're tracking.  The help text gives some examples.

**Unit of Measure:**  If you track 3 in a given day, unit of measure is the answer to the question "3 what?"  Dollars?  Dates?

Pounds?"  Avoid generics like "#" or "number", otherwise you'll see odd things like "3 #s has been recorded for today".

**Date Span:**  Metrics are all about tracking results over time, so this is where you specify what range of days on the calendar you would like to track.  Feel free to back-date the start of a Metric if you have historical data you'd like to include.

**Frequency:**  This is a matter of how often you want to be recording results.  Every day?  Every week?  You have several options.
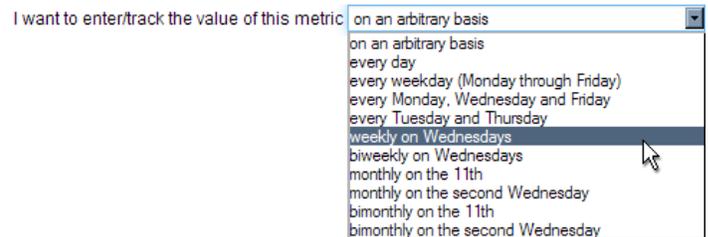


> **Tip:** If you want to track, say, weekly on Fridays, but the system is only giving you the option to track weekly on Wednesdays, simply set the Metric to start on a Friday and pick again.

**Target:**  You can set a goal by setting your target starting and ending value.  This makes a target line to aim for throughout the duration.  Goal setting is powerfully orienting so this is always highly recommended.  The "i.e. ____ [every day]" controls give you a convenient alternative to specifying the end target.  So if you want to, say, do 15 minutes of meditation every day for 2 weeks, the system will do the math for you that your end target should be 210 minutes.

**Data Entry:** This is the easiest and most common setting to get wrong in all of CoachAccountable, so let me make this Mechanics section of this manual count and really make this clear.

- If your goal is starting at zero and building to something (common examples include dollars earned, pages written, and total minutes of exercise) then you'll want to choose **incremental** because a number you enter today should be added to the total thus far.

- If you have a daily goal that's not meant to accumulate (common examples include calls made, weight lifting reps, and weight) then **absolute** is the right choice.

You can always toggle between these two modes, so if you change how you'd like to structure your goal (from a daily one to an accumulating one or vice-versa) its no problem.

**Reminders:** Reminders are the magic behind regular tracking: set this once here and the system will ping you on the right days with an email or text, prompting you to record your number for the day before you forget.

## Reporting via Email

If you opt for email reminders, simply reply with the number for that date plus an optional comment about the result. Leaving a comment is highly recommended for reasons outlined earlier in this manual.

## Reporting via Text

Reporting your numbers via text is very similar to replying to email reminders, save for one gotcha: you can only reply to the most recent text that was sent to you. So if you have 3 metrics and the reminders all fire off to you via text at, say, 7pm, the system will think that any reply you send applies only to the third one.

To get around this you can stagger your reminders in time, sending at, say, 7pm, 7:10, and 7:20. If you have an email-enabled phone, your best option may be to simply choose email reminders, allowing you the freedom to reply to each at your own pace and in any order.

# Reviewing Session Notes

Your coach may share with you session notes. If this is the case you'll find them to be a lovely resource, containing concentrated nuggets of the very best from your sessions. Often they'll be emailed right to you, and otherwise you can always pull up the growing collection by logging in and visiting the Sessions area.

# Doing Worksheets

Your coach may assign you worksheets to complete. For better or worse, you have to be logged in to CoachAccountable to complete them. You can't fill them out via email.

The good news is that email notifications of the worksheets themselves will contain a magic link which, when clicked, will take you right to the worksheet, ready to fill out. So you're never too far, and worksheets are easy to fill out from any device.

Worksheets come with a due date, and otherwise you can work at it at your own pace. Simply click "Save" if you'd like to pick up working on it again later, and otherwise be certain you click "Complete" when it's all done. This is what will submit the worksheet back to your coach, and mark it officially done (hopefully before the deadline has passed!)

# Writing Journal Entries

Writing a journal entry is as simple as clicking the "+Journal Entry" button at the top of the screen, giving your entry a fitting title, and getting down to it. A few simple formatting tools are available for you if you care to add headings or the occasional bit of *italics*, and otherwise you're free write to your heart's content.
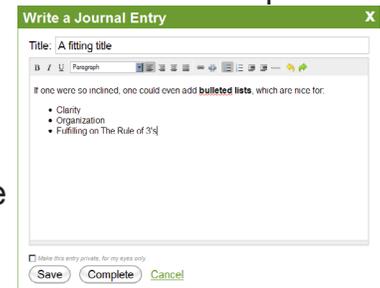


You can save drafts that aren't yet ready to be committed, and only when you've marked a journal entry complete will it be visible to your coach. Once completed, you have a 30 minute window in which to bring it up again for edits. After that time it's committed to the ages, and unless you've marked your missive as private, it will be shared with your coach via email, paving the way for further conversation and support.
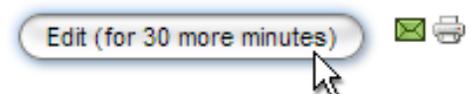
# Sharing Files

Your coach can share files with you via CoachAccountable, and accessing them is as simple as clicking the big "Download" button (or, easier still, clicking the magic download link in the notification email about the newly shared file).

You can also share files with you coach. When you do this you can either upload it from your own computer or share a link to the file hosted elsewhere on the web.



# Leaving Comments

On any of the other items within CoachAccountable, you and your coach can leave comments. A lot of the time you can make a comment on something by replying to the email which announced it. You'll know this by the little hint found at the top of the email:

Reply ABOVE THIS LINE to add a comment to this journal entry.

Otherwise you can always make comments on any item found under the Stream tab:



Either way, your comment will be immediately emailed to your coach (except private comments, of course):



Emailed comments can be replied to as well to continue the dialog. It's a great way to have focused mini-conversations about happenings in your coaching relationship.

# Closing Thoughts

Now, after taking in the essays of **Motivation** and the bite-sized lessons of **Mechanics**, it is my sincere hope that you are in a place of excitement.

May you be excited for all that there is for you to get out of your coaching relationship that is yet to unfold, namely the results you have at stake in your personal and/or professional growth.

Keep up with your action plans, write out your thoughts, track your progress, review your insights, and stay in touch with your coach. Generally speaking and to the extent that they are available to you, I want you to use your coach up for all he or she is worth. Stay engaged and I promise your coach will have your back as you take on ever bigger things.

Have an amazing time,

John of CoachAccountable