coach accountable's

Poignant Guide

to coaching with

coachaccountable

Get the most out of CoachAccountable coaching software and bring top-notch structure to your coaching style.

Learn how to get more follow through, improve measurable results, and grow your practice.

Forward

by John Larson, creator of CoachAccountable

Hello and welcome to *"CoachAccountable's Poignant Guide to coaching with CoachAccountable".*

This guide is written for you, the individual well-qualified to coach/guide/train in whatever realms you coach, guide or train in. It is to provide you with a detailed account of how to use CoachAccountable to realize huge wins for you and the people you support. I've been using CoachAccountable to make my own coaching better for the last 6 months, and since it's only been out for 2 months (as of this writing), it falls to me and no one else to share the gems from that experience.

You may be wondering: if I bill this software as super intuitive and easy to use (I do), why should a guide be necessary? Simply this: *because it is not immediately obvious how to unobtrusively incorporate comprehensive system into your coaching style.*

I'll explain. Your coaching style consists of *content* and *structure*. The *content* of your coaching (i.e. the distinctions, the perspectives, the resources, and the swathes of expertise that you use to coach) is the real heart of your coaching. It's what you trained in, and is the essence of the value you provide. The *structure* of your coaching (i.e. how you interact with the people you coach to impart that content) is, it turns out, a largely separate matter.

Structure is the difference between talking once a month (and then your coachees are otherwise on their own), and something more supportive. It covers things like to do lists, giving assignments, channels for feedback, and methods of tracking & measuring progress. Unlike content, I find that structure seldom gets much attention in the training of coaches.

There is a very good chance that your content is great *and* your structure a far cry from what it *could be* towards realizing the very outcomes your coaching seeks to provide.

In this guide I won't be telling you anything about how to do actual coaching. The *content* of your coaching is yours, and I don't presume to have anything to offer you to improve that. Regarding the *structure* of your coaching, however, CoachAcountable and I have much to offer you. It is the task of augmenting your coaching with supporting structures that is not immediately obvious, especially when so much software out there is cumbersome and often feels more like a distraction.

Read on to learn how to increase follow through, improve measurable results, grow your practice, and much more.

Cheers,

John

How to Use this Manual

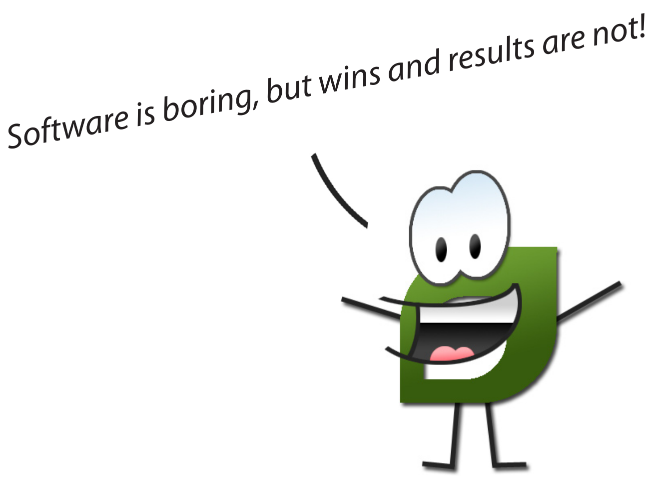
On the following page you'll find a table of contents which lists a motley collection of phrases and ideas. Rather than be a comprehensive instruction book to the CoachAccountable software and its features, this manual is focused on illustrating the benefits it provides to your coaching. (Benefits, it turns out, are WAY more interesting to your average coach than features.)

The table of content items are therefore jumping off points to their respective conversations, presented in no particular order and ripe for sampling and jumping around so as to fit your interests and priorities.

With that in mind I invite you to peruse the items listed on the following page and click whichever piques your interest. Surfing the manual this way will get you acquainted with CoachAccountable (and what it can do for you) much better than reading it straight through (who want to read a 29 page software manual cover-to-cover, anyway?).

There are a few elements of style when it comes to coaching that are prescribed in several places in this manual (strictly regarding structure, not content). They are delivered unapologetically, but might well contradict your own way of doing things. In this case I say simply disregard: this manual isn't meant to tell the world how it *should* do anything, only to supplement it with nuggets of wisdom gained through experience. So take only what serves you and leave the rest behind.

Enjoy!



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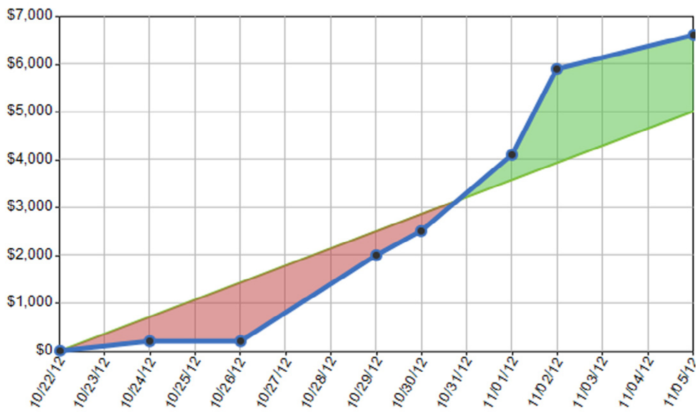
Make Things Real

Insights, tips, and feel-good sentiments are all nice and great things you can provide to the people you coach, but you know what's really nice? Results, expressed as hard, cold, numbers. And not just one or two numbers (which generally lack context and can be spun any which way), but a bunch of them that show the real results and progress over time. Numbers that reveal trends, numbers that demonstrate forward momentum, and even numbers that reveal stagnation or setbacks.

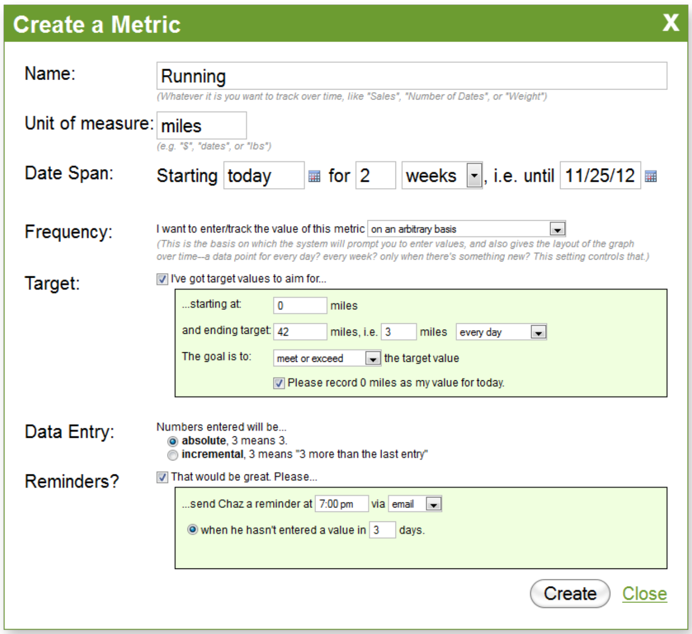


If you do nothing else with CoachAccountable, use it to have your people self-track one or two things that are important with Metrics. Maybe you already know exactly what they should track, or maybe you need to just ask them what's something they'd like to work on. Plan to track it for at least two weeks, it doesn't even have to be something you're coaching them on directly. Have them set a target: something they are trying to work up to or get below.

"What gets measured, gets managed" is surprisingly true. Share this idea and get them on board with tracking things for even just a few weeks. Assure them it will be easy and painless (it will be), and that it will be insightful and often surprising (even for them) to see how things play out over time when regularly measured.

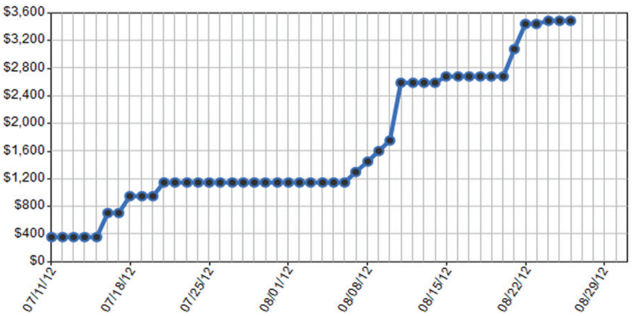
"What gets measured, gets managed."
- Peter Drucker

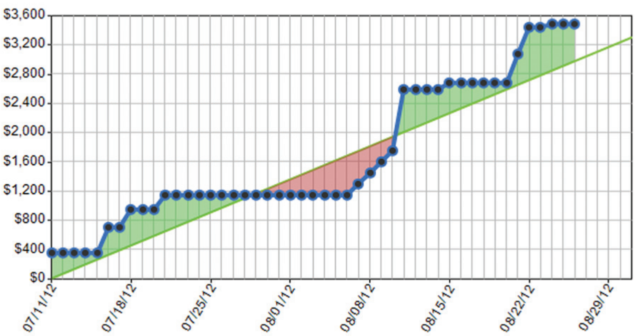
Always be certain a reminder is set for a metric: reminders are what makes actual tracking (on the part of your clients) happen. Reminders are regular emails or text messages that enable tracking without requiring a login to the system. Remember, we always want our software for coaching to make less work for our coachees, not more. Reminders turn tedious data entry into a quick task and welcome notice that this thing is important, and someone cares about the result.



Visually Motivate the Pursuit of Goals

Targets make things real because, well, look at the difference between these two graphs:





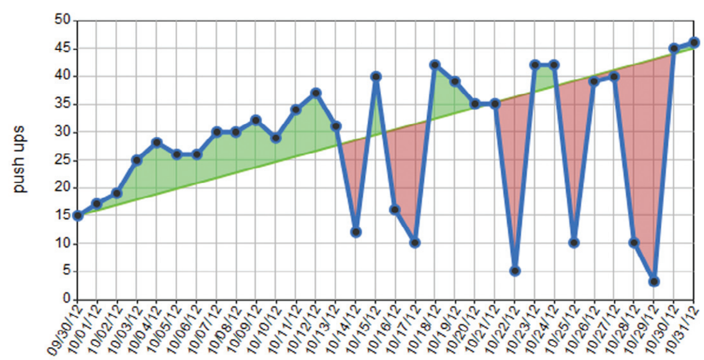
Not sure what the start and end values of a target should be? Targets can be made up: they're just a goal, a (potentially) arbitrary declaration of what is worth aiming for. In a very healthy way, it is uncomfortable for your coachees to see a graph with a lot of red on it, and conversely it feels great to have a lot of green. This is very basic visual reinforcement psychology, and it works.

During the month of October I challenged myself to do push-ups every day, starting with 15 a day and ending at 45. On days when I was tired I so didn't want to have too much of a red blotch on my graph, and it had me push through in ways that no tracking or non-visual tracking would not have.

Things worth tracking with Metrics:

It turns out that what to track will often reveal itself over the course of coaching an individual, and are often quite niche to a particular situation. But here are a few general examples to get you started thinking on the matter:

- **In sales:** revenue, closings, funnel progressions, units shipped, customer sign ups
- **In fitness:** minutes of exercise, miles ran, visits to the gym, push-ups, weight, healthy meals
- **In career building:** applications, interviews had, networking connections made
- **In management:** minutes in meetings, milestones met, team performance
- **In personal relationships:** friends called, compliments given, evenings out, dates gone on, thank-you notes sent, invitations made
- **In personal habits:** minutes of walking, cigarettes smoked, time spent relaxing



Guide your clients to declare goals for the things they are working on, and enter them as Metrics. Let them get uncomfortable with seeing too much red, and otherwise relate to their charts as works of art that they paint one data point at a time.

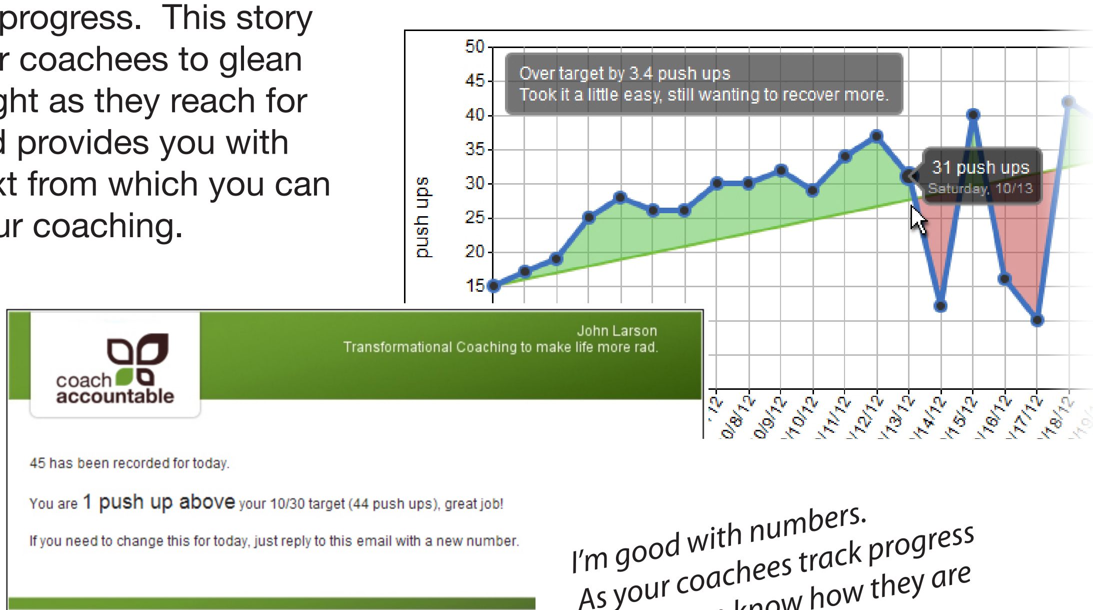
Have them Build a Story

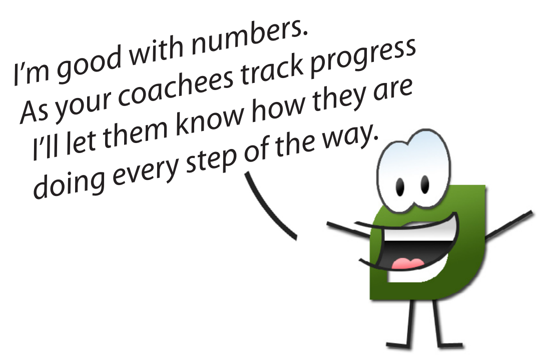
Metric data points can be annotated with comments. These should be thoughts about the data and how it is going, and might contain reasons for an off day or an account of what happened to cause a great one. Literarily speaking, they are about a par with tweeting in terms of brevity and formality. But taken over time, comments tell a story about the progress beyond just numbers and a pretty graph. They reveal what tends to cause setbacks, and what tends to cause forward progress. This story both helps your coachees to glean applicable insight as they reach for their goals, and provides you with loads of context from which you can better tailor your coaching.

Instruct your clients to always leave a comment when they track their metrics, to either:

- State how they feel about their progress to date, or
- Describe what's working, or
- Describe what got in the way

If they do this for even a week you'll be surprised how much more you have to go on in your coaching.





Key Takeaways:

- Explore with your coachee to find one or two things to track as metrics
- Make reporting easy by setting reminders for a metric
- Encourage your coachees to leave a small note on every data point
- Review metric progress to inform your coaching about what's working and what's not

Assign Introspection

Yes, you can do that. In CoachAccountable we call it "Journal Entries". At any time, you or your coachee can create a journal entry. With just a title and a body, Journal Entries are like blog posts in and around your coaching relationship. As coach you can assign your coachees to journal about whatever it is you feel would be beneficial for them. If you're thinking of more academic writing assignments that you might be familiar with, trust me: this will be way more useful than an analysis of the symbolism in Moby Dick. Journaling assignments are a way to have someone grapple with a topic sufficient enough to commit thoughts to words.

Example Journal Assignments:

- Take stock: write up how you feel the last month went.
- Come up with one BHAG* for yourself and describe it in 3 paragraphs.
- Go do X with your client/boss/spouse and journal about how it went
- Muse on how things appear to be going and what advice you would give your self moving forward**

Let them Brag

Grappling with what's so and what's next is like the meat and potatoes of coaching, but don't forget the cake and ice cream. Assigning someone to brag on specific accomplishments or more generally what's going well is a gift: it's fun to do, and makes a lasting account of the progress your coachee is realizing. Such journal entries are a welcome break in coaching relationships where striving for the next level is usually the focus.

** Big, Hairy, Audacious Goal. Do you have any that you're working towards?*
*** You would be surprised how well this works to transition someone out of overwhelm and into self-generated action.*

Self-Generated Musings and Brain Dumps

The best thing that can happen as you instill a practice of journaling is for coachees to take it upon themselves. As the journal entries become engrained as a simple way to share thoughts within a coaching relationship and make them real, a coachee comes to writing riffs like these:

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.

These are more than ripe fodder for future coaching conversations. Encourage this sort of behavior when appropriate.

Key Takeaways:

- Give journal entry assignments on things you want your coachees to really think about (once a week is good)
- Journaling about particular actions they took, both how it went and what they learned, is a great kind of assignment
- Encourage journaling freely about things on their mind or what they might like coaching on
- Let the content of journal entries fuel your coaching conversations

Eliminate Forgetful Follow Through

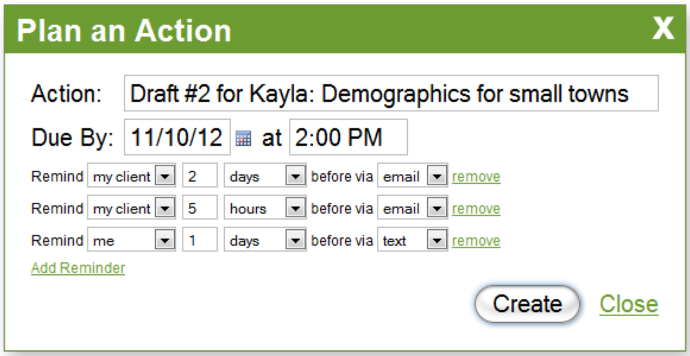
Does this ever happen to you? You have a great coaching session, hash out an action plan for the coming week that your coachee is inspired by, wrap up the session excited for what's going to happen in the next 7 days, and then reconvene a week later to find that little to none of the brilliant plan was actually acted upon.

Life happens. Inspiration is perishable. Good ideas fade and forgetting happens by default. We all wrestle with these truths as we strive to cause great outcomes with the people we coach.

With surprising regularity, follow through and failure to follow through is a just matter of **awareness**. Assuming we are doing good coaching, we don't set up our clients with an action plan that is unrealistic (see the bit about course correction on page 11). Also assuming we are doing good coaching, we don't set up our clients with an action plan that isn't meaningful and worth doing.

An Action is just the "what" and "by when" and takes just a few seconds to enter.

So if a plan is genuinely doable (it should be), and worth doing (it should be), then just plain forgetting about it is the most likely opportunity for it to be derailed.



Setting up action plans in CoachAccountable helps the situation. An action is just the "what" and "by when", and take just a few seconds to enter. Any number of reminders can be set (the system suggests 2 by default), and these are what automatically keep action plans alive for your coachees during the time between your sessions.

A reminder is doubly nice because your coachee can reply to one in order to mark an action complete, thus making it a snap to do: no need to log in to do so (no hassle means no excuses!).

Get the people you coach into the habit of entering actions for themselves. Yes you could do it for them, but they'll own it more if they themselves typed it in. This also forces them to self-declare their own deadlines, which is a useful habit to get into.

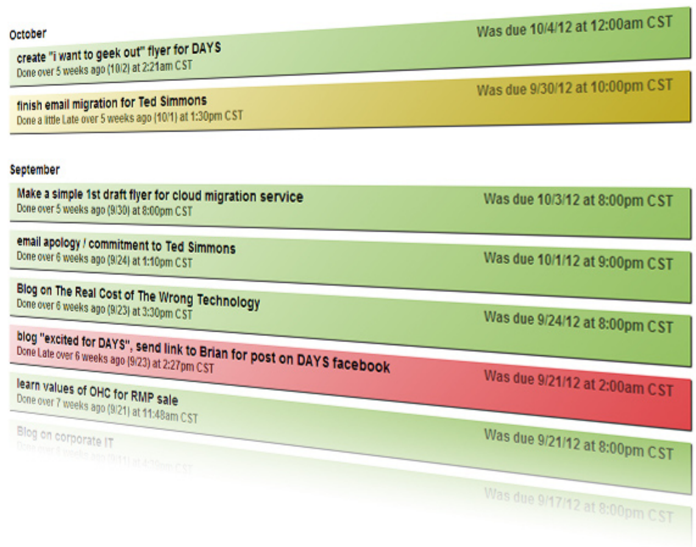
Angels on Your Shoulders

Unless you turn it off, CoachAccountable will automatically notify you whenever an action is marked complete and whenever an action becomes late. Now this is where it gets to be like CoachAccountable is an angel sitting on your shoulder, helpfully whispering in your ear what's happening (or not happening) with all of your clients as the weeks progress. You might prefer to remain hands off until next session, but you also might find you can do a world of good by offering your clients a quick check-up mid-week if nothing is getting done.

You can do a world of good by offering your clients a quick check-up mid-week if nothing is getting done.

Green is More Soothing Than Red

Actions that are on time are green, actions that are late are red. It's that simple (actually almost that simple: actions that are about to become late or were done a little late are yellow). This color coding lets everyone see at a glance how things are going in terms of timeliness, including the ever growing record of past actions. Green is more soothing than red, so the color scheme subtly encourages timely completion of things. Seriously.



Course Correct According to Reality

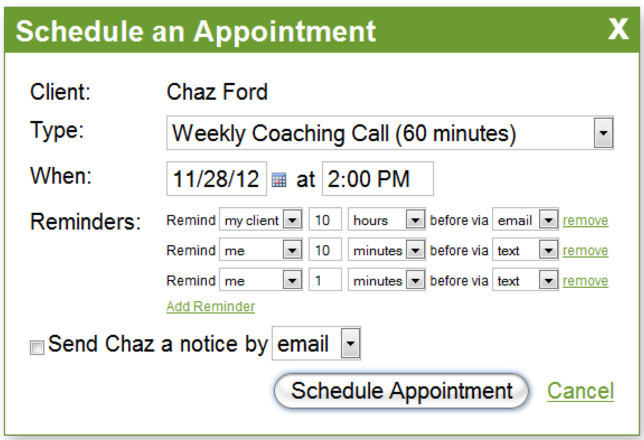
Tracking a set of actions which are color coded by timeliness makes it easy to see when action plans are consistently too much, and when they might be too little. Use this awareness of how your coachee is doing to either scale up or reel back ambitions on a week-to-week basis. A suitably challenged coachee is happier than a bored coachee is much happier than an overwhelmed coachee.

Key Takeaways:

- Have your clients enter their actions plans as CoachAccountable actions.
- Encourage liberal setting of reminders.
- Use the notifications of completion and non-completion to offer more proactive support.
- Between 3 and 7 actions is usually a good week: see how it goes and reel back if needed.

Make your Appointments Unforgettable

Ever forget to call your coachee for a coaching session? Or, more likely, ever call your coachee for a coaching session and they forgot and/or weren't prepared for it? Missed sessions and sessions that get off to a sluggish start because either party is not ready are both instances of pure waste: there's no upshot to it.



CoachAccountable appointments come standard with reminders that can be sent to you and the people you're coaching. You can set your preferred default reminders for appointments, which will kick in whenever either party schedules an appointment. Reminders are sent by email or text (in select countries). I recommend you set a reminder for yourself 10 minutes before appointments, and then one minute before. Ten minutes gives you time to adequately review your coachee's progress since last call, allowing you to hit the ground running and save valuable minutes which would otherwise be spent on a progress update. One minute gives you time to wrap up, collect your thoughts, and call your coachee right on time (a nice touch of professionalism, for sure).

For your coachees I recommend a reminder one day before and 30 minutes before. A day's notice is nice for two reasons: first to ensure they have that time slot still open for your session, and second, a reminder to check their action plan and be sure it's as up-to-date and acted-upon as possible. Thirty minutes gives them time to get ready and collect their thoughts on what they'd like coaching on.

Sync your Calendar of Choice

Your CoachAccountable appointments can synced with your Outlook, iCal, or Google Calendar. Just a few clicks to setup, this lets CA know when you're busy (to avoid double booking) and has your CA appointments appear with the rest for your schedule.

Key Takeaways:

- Set reminders for yourself to always be on time and always come thoroughly prepared
- Set reminders for your coachees to have them always available, as up-to-date on their work as possible, and never caught off guard
- You call them, on time, every time
- Sync your CoachAccountable calendar of appointments with your regular calendar software, and encourage your clients to do the same.

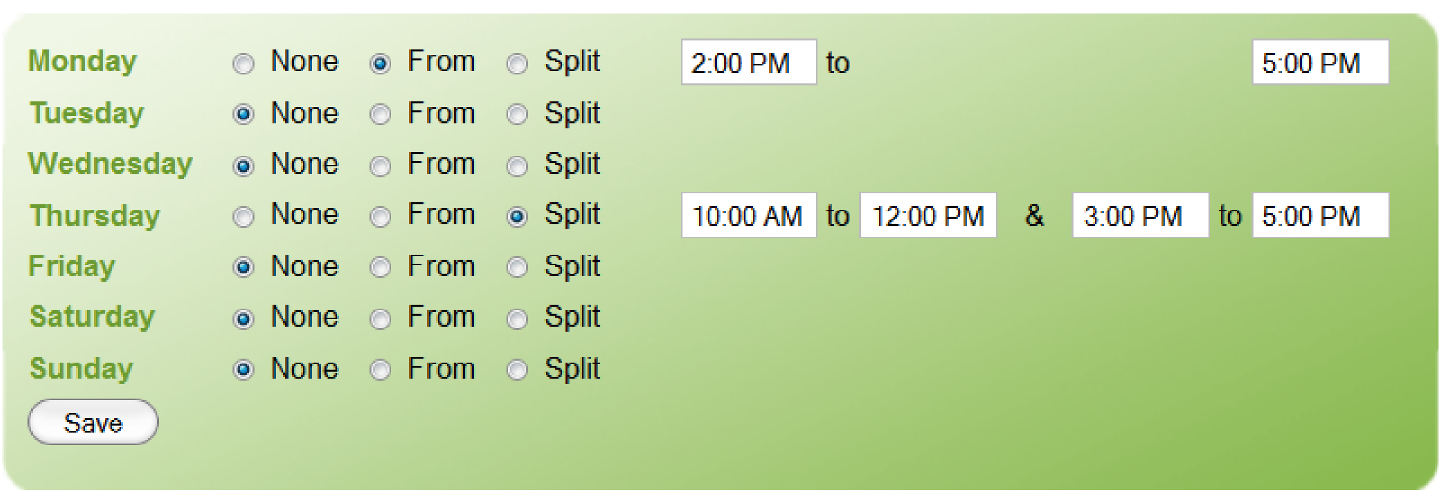
Make Yourself Available

The ideal for scheduling appointments with your coachees is in real time (i.e. over the phone or in person), during your current appointment. Both parties have their calendars open, and together find a mutually agreeable time for the next session. Often this is as simple as same time, same day, next week. You make the future appointment in CoachAccountable with a few clicks, set the appropriate appointments (see the previous chapter), and you're done. Easy-peasy.

But things come up, and your coachee may need to reschedule with you. (The reverse should seldom happen: as the coaching service provider, you never want to make any regular habit of bumping the people you serve to accommodate your shifting schedule.) Emails back and forth to find a time are painfully inefficient, and "just call me and we'll figure out a time" might be too hands on for you to reliably offer (but go you if you can--though it may be intrusive and doesn't scale well, it's really good customer service).

Between those two extremes CoachAccountable allows coachees schedule themselves for appointments with you. You tell CoachAccountable what time slots of the week you are available (e.g. "Mondays from 2-5pm and Thursdays from 10-noon & 2-3"), what the rules are for scheduling (e.g. minimum 2 days in advance and no more than 60 days out), and CoachAccountable thus presents those options for self-service online scheduling, acting as a sort of virtual secretary.

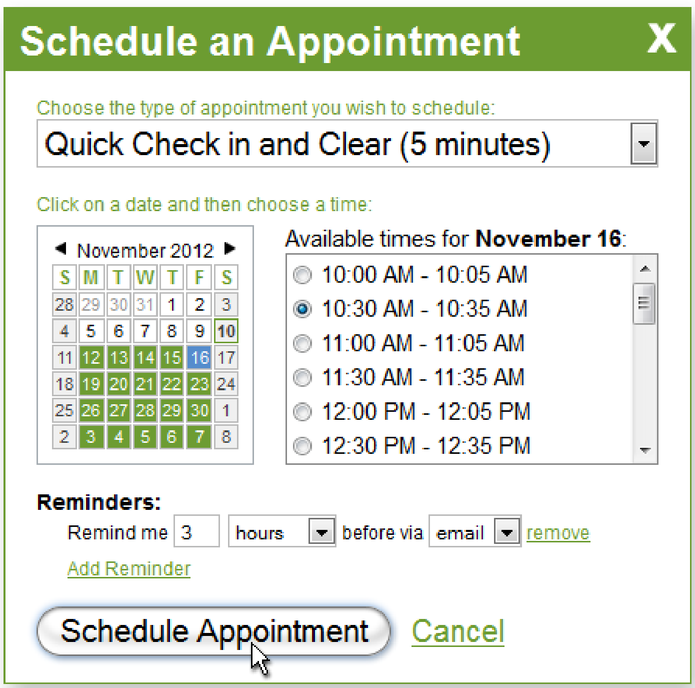
Client schedulings begin as just requests, and the system prompts you to accept or decline. Once accepted, it's on the calendar and your client is notified.



Being Available Upon Request

If you’re open to providing this level of service, you can welcome the people you coach to schedule themselves for on-demand coaching if needed outside of the usual routine. Offer a lightweight scheduling option (by that I mean, say, 5 minute appointments that clients are allowed to schedule with only 1 hour’s notice) for your clients to schedule themselves and CoachAccountable handles the rest.

Your clients schedule themselves, and CoachAccountable does the rest.



You call them

If you don’t already have a structural policy that you call your coachee for a coaching call and not the other way around, now’s a good time to enact one. Sure them calling you makes a nice exercise in practicing timely accountability, and gives them an opportunity for them to genuinely opt for your coaching on a regular basis, but the collateral damage of missed or late calls is too great. They’ve got enough on their plate to work at and grow at within your coaching relationship, don’t make being coached any harder.

Key Takeaways:

- Scheduling in real time with your client is always the best.
- Set up your availability to let your clients reschedule with you in a convenient, hands-off way.
- If it works for you, you can give your coachees more by encouraging them to request on-demand help if needed.

Let Them do Homework

The coaching minutes you have with your people is the most limited and also the most valuable: it is interactive, high-touch, and invariably suited to whatever is needed. You can make the most of this precious resource through smart and regular use of worksheets. Workehssets are small written assignments that have them focus and think about matters of importance within the coaching relationship.

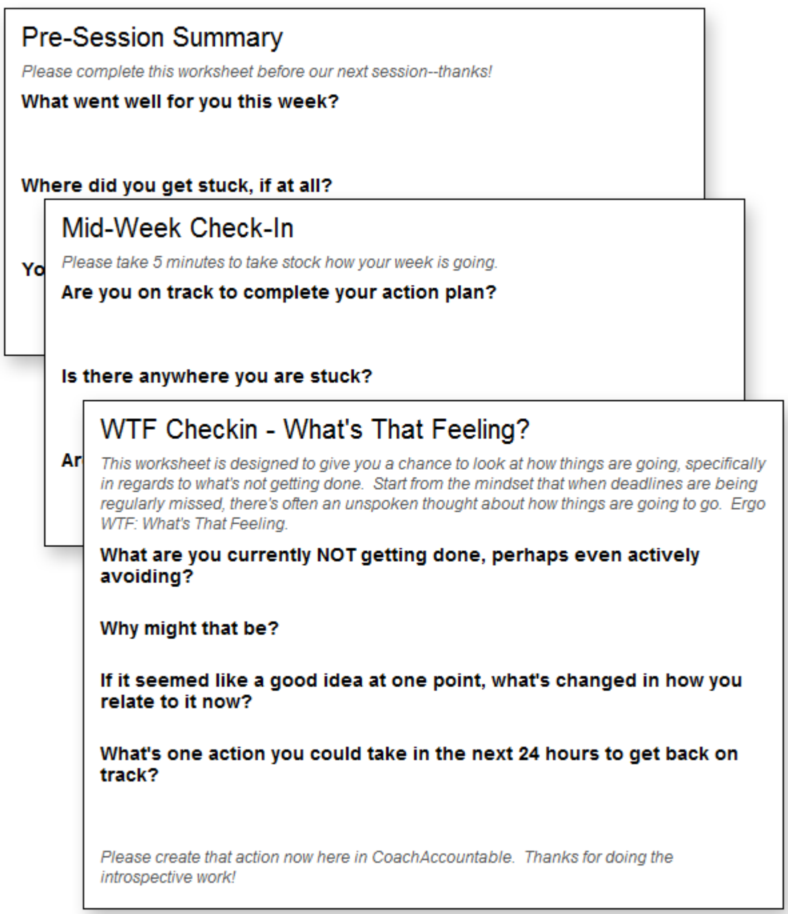
An intake form is probably the classic example of a coaching worksheet: that introductory questionnaire that gets the ball rolling. Here are some others that deserve to be in your repertoire.

This practice is powerfully [re]orienting and keeps things on track when you're not directly involved. This can serve as a sort of self-service coaching, and can even sub in for your presence in a week you need to be off.

Ponder This Exercise. Your coaching will probably give your coachees things to think about or new ideas to explore on a reasonably regular basis. Codify this process by assigning a worksheet that prompts and guides that exploration, and your coachees may be surprised by how much productive thought and insight they're able to generate in response to your line of questions.

Pre-Session Summaries. A quick review of the week that has your coachee put to words whatever is relevant by way of updates and happenings (outside of what is already tracked in the normal course of events by Action and Metrics, of course). This forces your coachee to get oriented and prime their brains for whatever they want to get out of your next session, and gives you a succinct overview that again saves time on the call and allows you to more specifically prepare your coaching.

Mid-Week Check-Ins. Even in conjunction with a Pre-Session Summary, it's not too much to ask your coachees to complete a 5-minute review of how things are going.


Pre-Session Summary

Please complete this worksheet before our next session--thanks!

What went well for you this week?

Where did you get stuck, if at all?

Mid-Week Check-In

Please take 5 minutes to take stock how your week is going.

Are you on track to complete your action plan?

Is there anywhere you are stuck?

WTF Checkin - What's That Feeling?

This worksheet is designed to give you a chance to look at how things are going, specifically in regards to what's not getting done. Start from the mindset that when deadlines are being regularly missed, there's often an unspoken thought about how things are going to go. Ergo WTF: What's That Feeling.

What are you currently NOT getting done, perhaps even actively avoiding?

Why might that be?

If it seemed like a good idea at one point, what's changed in how you relate to it now?

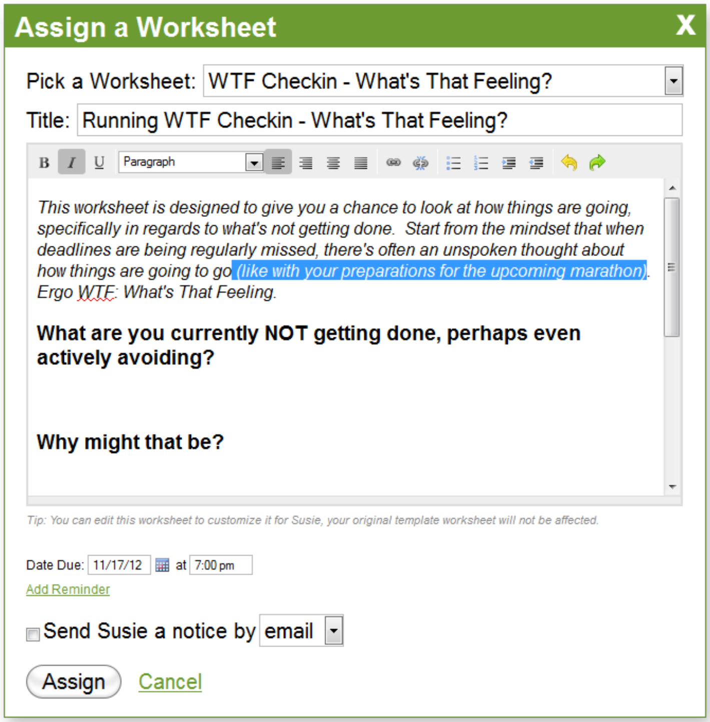
What's one action you could take in the next 24 hours to get back on track?

Please create that action now here in CoachAccountable. Thanks for doing the introspective work!

Just the Right Questions

“Worksheets” often have a certain air of permanence and rigidity about them. Even if self-written, after a while of use they start to seem like they were brought down from on high, standard templates that shouldn’t be tweaked.

Bump that: to the bits in a computer, worksheets are super fluid and it’s cheap to make one-offs. When assigning a worksheet, CoachAccountable lets you take one from your stash of templates and then edit it for just this assignment to your heart’s content. If a certain question doesn’t quite fit the situation, delete it. Change up the wording to make it as though crafted just for your coachee, and they’ll respond to it more, so add a note or a question that really fits the situation. There’s no reason you can’t take 4 minutes and type up a worksheet from scratch that’s just right for what you want your client to work on. If it’s a good one, you can save it for later with a single click.



Key Takeaways:

- Make the most of your sessions by having your coachee do prep work on a worksheet.
- A well crated worksheet can guide your client to effectively work through things.
- Tweak worksheets to fit the situation, and spin off new ones as needed and even for regular use later.

Showcase Your Style

Let's face it: though some folks have it really solid, coaching in general is a nebulous affair. People still commonly think that coaching must relate to the guy with a whistle bossing around a sports team, and even those familiar with terms like "executive coach" and "fitness coach" often have only a vague understanding of how it works and what it looks like.

Confusion with "therapy" still abounds.

All of these things are making your prospective coachees hesitant to engage your expertise, so use CoachAccountable to let them know what they're getting in to.

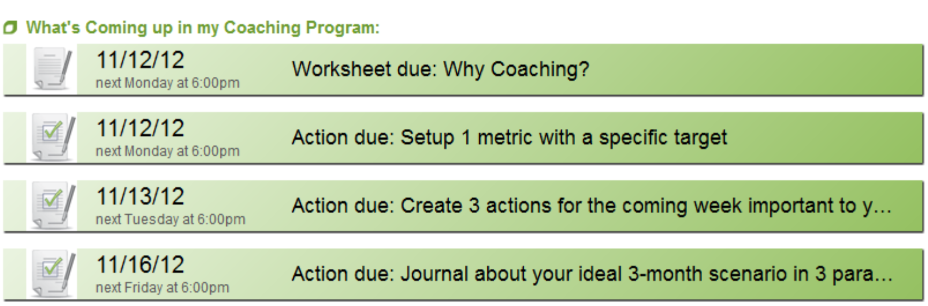
After working with the system for a while, you will no doubt get into a groove of structuring things: the kinds of worksheets you assign, actions you recommend, and metrics you typically track. You want to impress a would-be coachee? Set these things up for them as though it were day 1 of your coaching relationship.

Then give them the login, and walk them through over the phone (or in person) how this is going to work. Explain to them things like "*This* is how we'll set and track goals.", and "*This* is where we'll be making your action plans to see them through."

A "Demo Client" is another way to show off your coaching style: to some extent you can back fill things like metrics, actions, notes, and files which collectively illustrate the work and results of being coached by you. Do this and either show off screen shots or share the login and let people poke around.

Demonstrating the mechanics of things does a lot to clarify the value people can expect and build excitement to work with you.

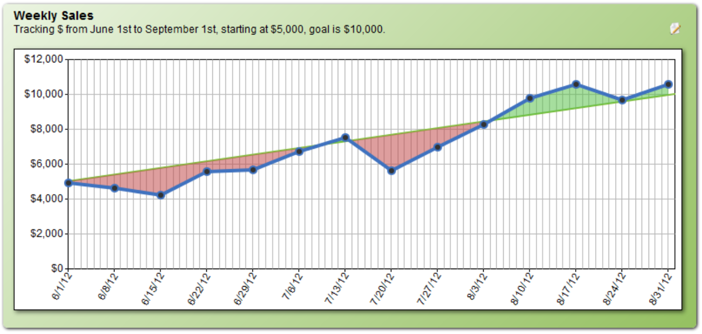
Look, coaching relationships (even really good ones) appear on the surface to be a jumble of documents, a few email exchanges, and memories of a few good sessions plus notes about them (if you're lucky). They look that way on the surface because that's what they are. If you have a more sophisticated way to showcase how coaching with you works*, congratulations, you are head of the class in this regard. For everyone else, know that so long as coaching is a relatively foreign and new concept (and probably beyond),being able to tangibly illustrate the process and expectable results of being coached by you will be a massive leg up in growing your practice.

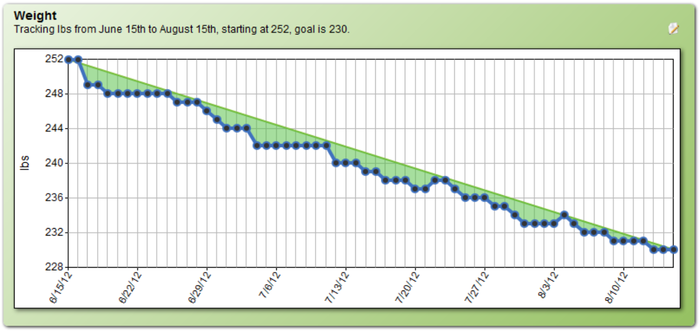


* *And I'm not talking glossy brochures. You don't trust them to mean anything more than a good design budget, and neither do your would-be clients.*

Real Results are Sexy

As illustrated in chapter 1, metrics are a nice way to track and visualize progress, see how it stacks up against a target, and follow the story behind the numbers with annotations. Maybe you've already got a success story or two under your belt: like when you doubled someone's weekly sales figures over the course of 3 months, or you helped someone lose 20 lbs in 8 weeks. You can show this off to the world on your website.





CoachAccountable lets you embed metrics in any web page by inserting a little snippet of HTML*. This makes the real, interactive metric graphs available to anyone you wish to share it with. So take the numbers from those past real life success stories (you do have data like that, right?), put 'em into a back-dated metric, add some annotations to tell the story, anonymize as necessary, and show it off to the world, loud and proud: "See these results? I produced them for this person and I can do the same for you."

Embedded metrics are great for case studies or even just blog features about your coaching. This is something to bear in mind for past, present and future coaching wins.

** Call your web guy or gal if you need help with this--it's a cut-and-paste job so if they charge you more than $25 they're jerking you around.*

Key Takeaways:

- Coaching is still largely misunderstood, and traditional marketing materials only go so far.
- Set up prospective clients with an account set for day 1 of being coached, and show them around.
- Set up a "Demo Client" to illustrate work and results of being coached by you. Share either screenshots or the login.
- Create a metric from past results a coachee has gotten from you, and show it off with embedding.
- Real metrics make great centerpieces for case studies or other literature about your coaching.

Have On-Topic Micro-Conversations

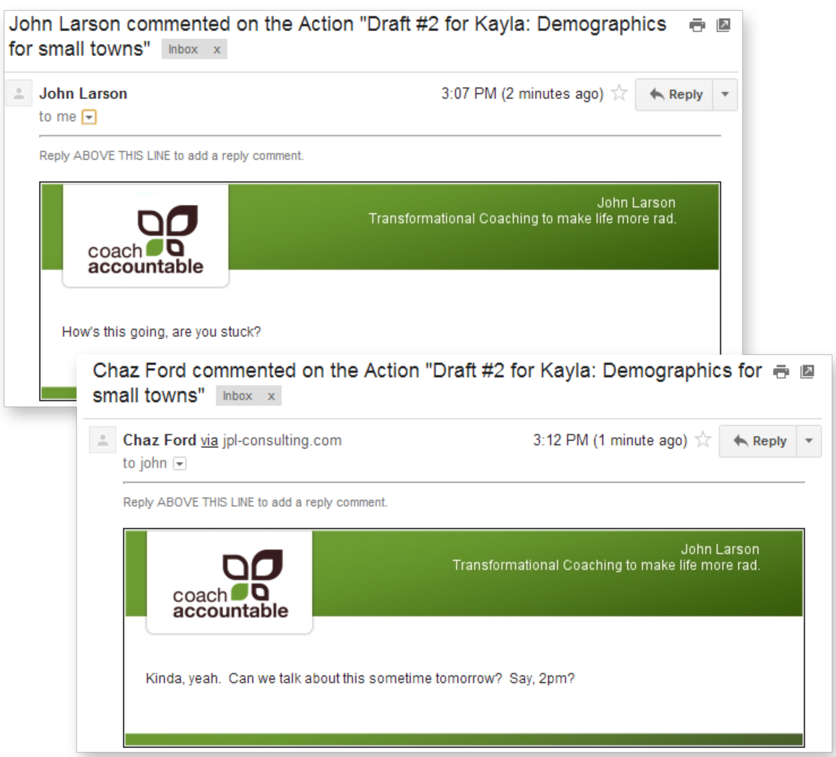
The CoachAccountable coaching Stream allows you and your coachee to add comments to any item in the system: actions, metrics, worksheets, and others. Add comments to these things, and encourage your coachees to do the same. Why? The work that gets done in coaching is interesting and important, it is nuanced and often exploratory in nature. Regarding a particular action or metric, you can add thoughts and words of support as they occur to you. Your coachee can note how it's going or what they're struggling with.

Comments by one party are all delivered to the other by email, and adding a reply comment is as simple as a reply email. These comments become micro-conversations, each centered around a focused aspect of the coaching relationship. They become timely, on-topic ways for your coachee to be supported by you and continue your collaboration in a fast an easy way.

Feedback is like oxygen for ambition. It is a potent reminder for your coachees that someone cares about their progress, so give it often. Feedback in the form of a comment on a particular thing they are working or already finished with sparks dialog, encourages progress, and/or gives your coachee something useful to think about.

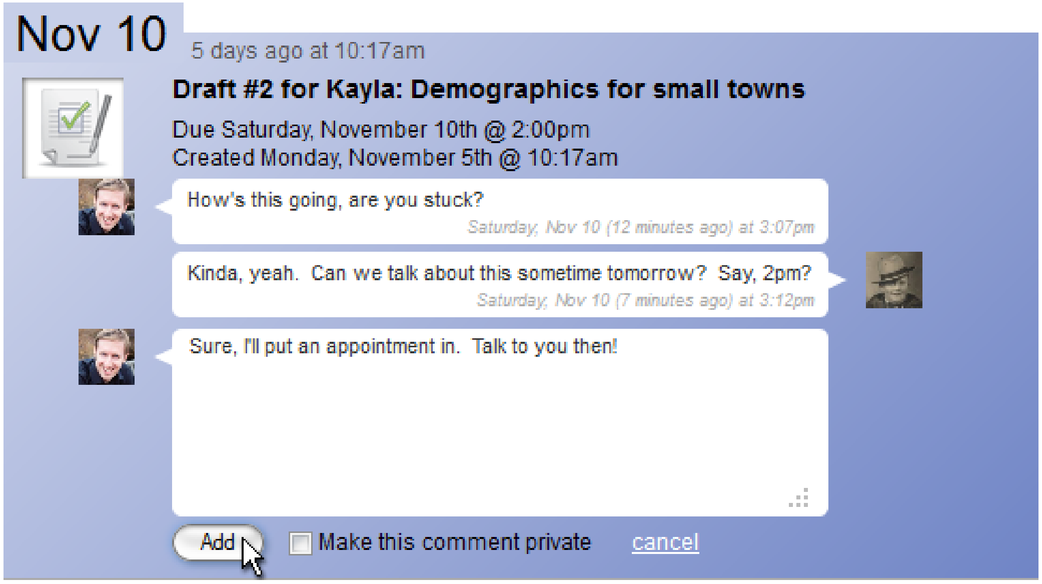
Unless you turn them off, you'll get notification emails whenever a coachee plans an Action, whenever an Action is completed, and whenever an Action becomes late. Reply to any of these notices to share a comment: again, encouragement and support are yours to give.

Feedback is like oxygen for ambition.... encouragement and support are yours to give.



Better Than Email

Though comments can be made via email, they're better than just email. Stream comments allow multiple threads of conversation that can each go at their own pace, and are easier to deal with than uber-emails that contain 6 questions requiring 6 responses. Stream comments are also filed appropriately within the CoachAccountable Stream, making them much easier to review. Way better than trying to review a conversation strewn across many emails in an inbox.

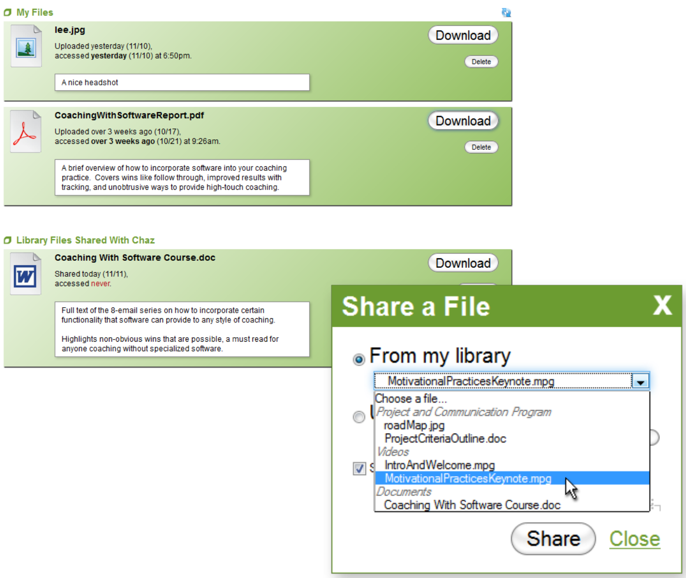


Key Takeaways:

- Add comments to things in your coaching relationships as a lightweight touch point for support and encouragement.
- Have your coachees add comments to share thoughts or request help on specific things.
- Action notifications are an easy way to interact with your coachee in a timely way as things unfold.

Share Video, Audio, and Other Materials

In your coaching style, you either have files to share with the people you coach, or you don't. If you don't, skip this chapter.



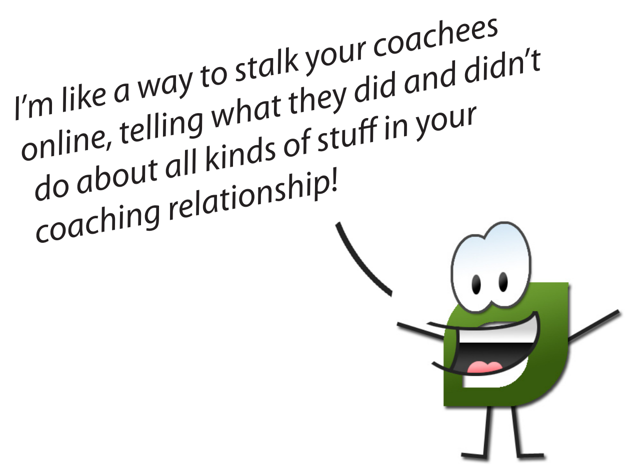
If you have vidoes, audio clips, or e-books as part of your coaching style, share them with CoachAccountable. You'll avoid clogging up inboxes (important for larger audio and video files), and you coachees will have files easily accessible in one place instead of lost in their inbox (never hear from them again "Hey, could you resend that to me?"). The anywhere access for you and them is nice as well.

CoachAccountable tracks when shared files are accessed by your coachees, so if you assign them something to read you'll know when they downloaded it, or that they didn't.

If you have files that are part of your usual regiment of coaching materials, add them to your library. Then you can upload once and share with anyone with a few clicks.

Embedded Media from Suitable Hosting Sites

YouTube, Vimeo and simlar services are a great way to share video. Unlike a simple file upload, hosting sites can smartly stream media to accomodate all devices, browsers, and network conditions. Media from recognized sites can be seamlessly embedded into CoachAccountable for in-app delivery to your clients, giving you the best of both worlds.



Key Takeaways:

- Share files, especially the large ones, with your coachees in CoachAccountable.
- You can see when a coachee last accessed a file on the Files tab.
- If limiting access is not a concern, YouTube is your better option for sharing video.

Distill it Down For Them

In an hour long coaching session you're apt to unearth all kinds of gems of insight, perspective, ideas, and actions. The people you coach probably aren't taking notes, they're engaged in the conversation with you. And if they are, they're probably not recording the exact takeaways you want them to have.

Do them a favor and distill it down for them: after your coaching session, give them the most important nuggets to take forward and act upon. Session notes don't have to be long, so if you're not already in the habit of taking them, just 2 paragraphs and 3 bullet points are usually sufficient. Ten minutes as part of your post-session wrap up is all it takes.

The Situation/Focus

Fast and exciting times: between the DAYS charity event, cultivating your rockstardom with Simmons and co., and prepping to pitch for OHC, you've got 3 great growth opportunities to focus on this month. Your metrics are looking great, so you're both making enough right now and sowing seeds to be even more prosperous in the near future.

Key Insights or Distinctions

- Even though you're a bit remiss about it, I think you've stumbled on a great sales technique for your monthly maintenance plans by virtue of pre-dating new plans to allow a deep discount on break-fix work. You're still making enough in break-fix sales to meet your goal, so beefing up your recurring revenue is completely appropriate.
- Really allow Ted to know and appreciate your desire to do great work with his office and others like it. Have him interested in your success by being genuine in your efforts to make his office's IT sing as well as owning that you were a little lax about things in the past, and pave the way for him to sing your praises to future clients.
- Keep cultivating yourself (with all your charm, character, and bottom line results) as THE product of your business: let folks see loud and proud who you are. You being that while you mingle at the DAYS event is a perfect place to both more solidly create the business you and practice being and sharing it with others.

Actions

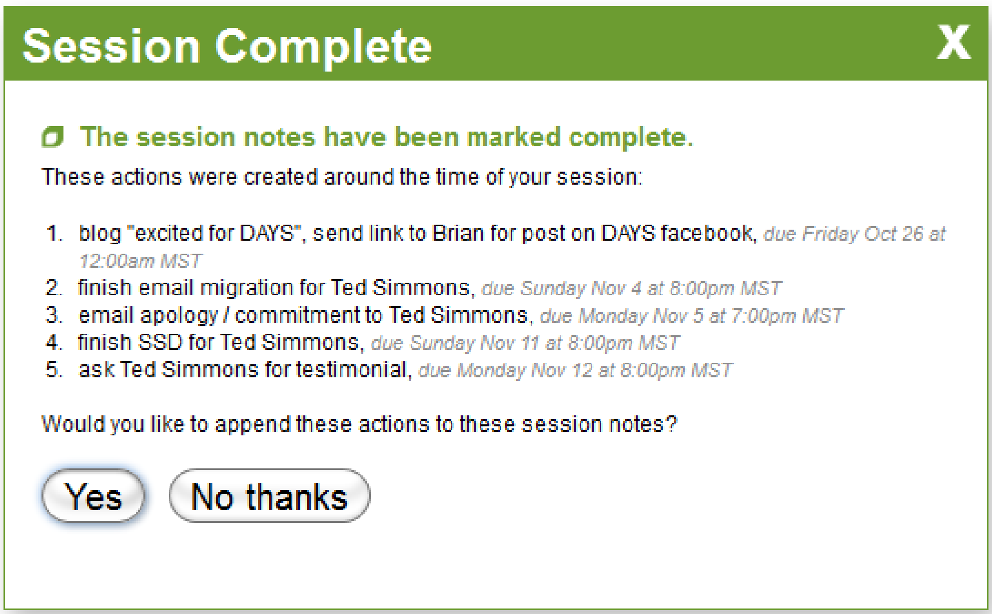
- finish email migration for Ted Simmons, *due Monday, Sep 17 at 4:00pm*
- finish SSD for Ted Simmons, *due Monday, Sep 24 at 4:00pm*
- ask Ted Simmons for testimonial, *due Tuesday Sep 25 at 4:00pm*
- email apology / commitment to Ted Simmons, *due Tuesday Sep 18 at 4:00pm*
- blog "excited for DAYS", send link to Brian for post on DAYS facebook, *due Friday Sep 7 at 8:00pm*

You're giving them the director's cut of what matters on a silver platter, making it all the more likely they'll act upon your coaching.

The payoff is twofold: first you're giving them the director's cut of what matters on a silver platter, making it all the more likely they'll act upon your coaching. Second, this becomes part of the growing record of insights and value they've gained working with you, accessible and easy to review for reinforcement.

It's All About the Plan

During a coaching session, make a habit of telling your coachees to add Actions to CoachAccountable as you go based on your conversation (after all, distinguishing a worthy action plan moving forward is part of your coaching, right?). Actions that are added during and around the time of your session can be noted as part of the session notes with a single click. Couple this with the key insights you've typed up and you have a fine documentation of your session. Email it to your coachee with a single click.



Key Takeaways:

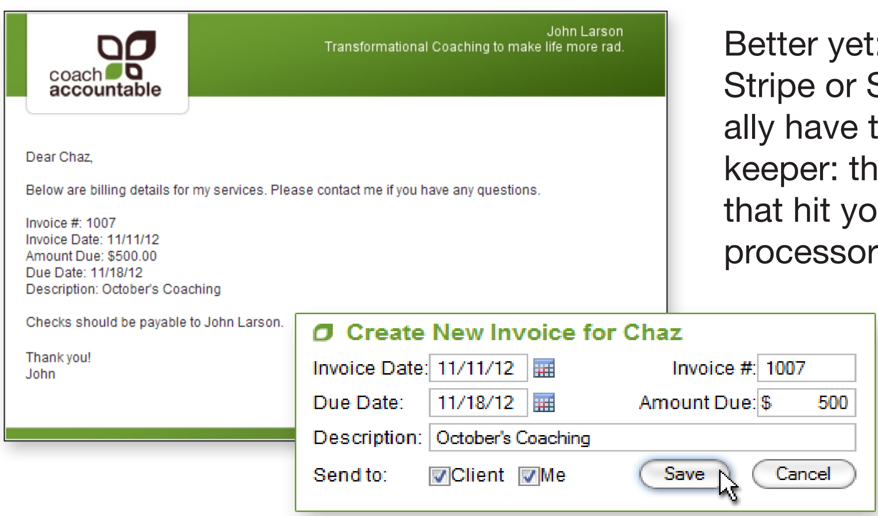
- Take and share notes of your coaching sessions: emphasize what you know to be most important.
- Simple and concise notes are sufficient if not downright ideal: aim for something your coachees are likely to read and easily digest now and later.
- Roll actions into sessions and session notes whenever possible.

Invoice and Be Cool About It

Invoicing is just one of those formalities, isn't it? If you're responsible for billing the people you coach, it is in everyone's best interest to make it as easy and effortless for you to get paid.

CoachAccountable invoices are easy to create and easy to send. Create and send these with a few key strokes and off they go, clean and professional with your own personal branding.

Make things easy for your clients by configuring online payments with Stripe or Square. When enabled, your clients are just one click away from the invoice email to paying it. When payment is made, your records are updated accordingly.



Saved Cards on File

CoachAccountable allows your clients to save their cards on file, making it easy for them to pay future invoices with a few clicks. Cards on file can also be used to process scheduled payments automatically, allowing you to offer installment or subscription plan payments easily.

Integrate with your Accounting Software

It's easy to get all of your invoicing data out in spreadsheet format, and this is ripe for importing into your accounting system of choice when reconciling your books at the end of the year.

Better yet: when you collect payments via Stripe or Square, THOSE systems actually have the data you need for your book keeper: the real record of dollars and cents that hit your bank account after payment processors fees. Both have comprehensive means of connecting with your accounting platform.

Key Takeaways:

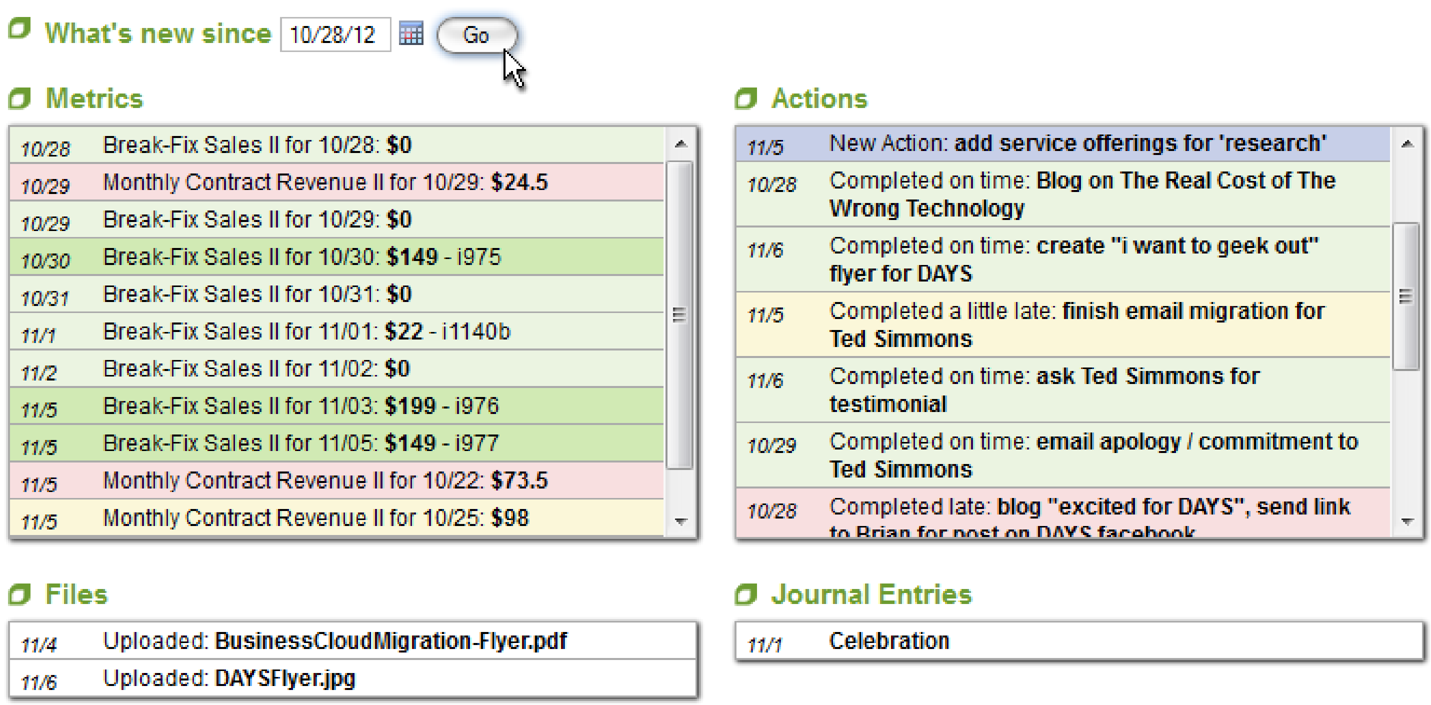
- Send simple, professional invoices from CoachAccountable.
- Enable online payments to make it as easy as possible for your clients to pay you.
- If not already fully available in Stripe or Square, you can essily export your invoicing data for your accounting system of choice.

See What's New

So you've got your coachees using the system. They're using actions, and follow through is notably higher. They're tracking Metrics, and seeing their progress unfold in detail like never before. They're completing worksheets, and grappling with productive questions between sessions. They're writing journal entries, and recording worthy musings and insight.

These are all great and worthwhile by themselves, but it gets even better: this information contained within your shared, online workspace allows you to know in great detail what's happening and how things are going before you reconvene for your next coaching session.

So check it out. Anytime you're curious to know, and certainly before a coaching appointment, give a look to the Overview tab and see what's new with your coachee since you last talked. Doing so will let you skip a lot of the progress report that usually takes up the first few precious minutes, and also let you pre-tailor your coaching to what's really going on (as opposed to reacting on the fly).



Color Coded for Your Convenience

Items in the Overview are color coded to let you better see at a glance how things are going.

Actions:

- Blue means new
- Green means done on time
- Yellow means done a little late
- Red means done late or became late

Metric numbers:

- Green means on track
- Light green means on track but slipping
- Yellow means not on track but getting closer
- Red means not on track

Preparation Over Reaction

If you walk into a coaching session knowing nothing new about your coachee since you last talked, you necessarily have to react to whatever they're up to and dealing with in the present moment.

A little foreknowledge of how things are going, including what's done and what's not, goes a long way to letting you prepare your coaching for the situation at hand. Just a few minutes of silent contemplation can radically alter the tack you take in your coaching session. It's simply a higher level of service that is made possible by detailed awareness.

Most coaches never have the luxury of this sort of knowledge going into a coaching call. If you're one of them, be prepared to be surprised by how much more effective your coaching can be when it's more prepared and less of a reaction.

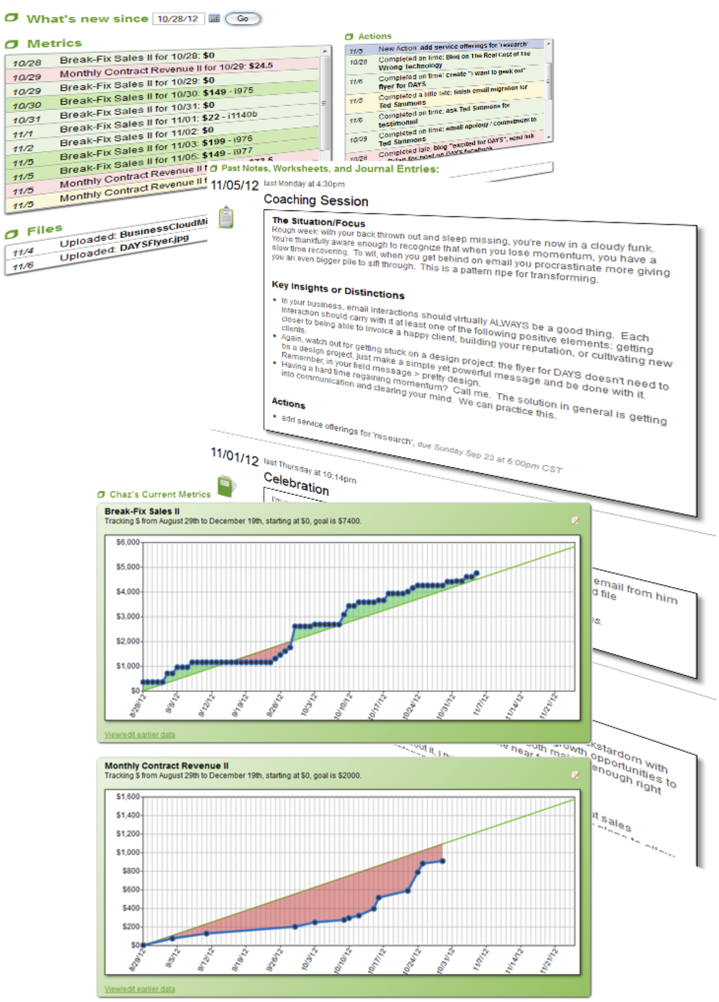
Just a few minutes of silent contemplation can radically alter the tack you take in your coaching session.

Key Takeaways:

- Always look at what's new with your coachee just before coaching them.
- If your style is more high touch, look at what's new between sessions and offer up proactive support.
- You are capable of delivering much more helpful coaching as a preparation than a reaction.

Scale Up not Water Down

As you grow your coaching practice with more simultaneous engagements, it is a challenge to keep up the same level of attention and focus for each. As coach you are privy to a lot of particulars of people's personal quests to grow and succeed, and following these developments gives you the necessary context from which to coach. After a while, it's too much to hold in your head and the likelihood of wires getting crossed rises.



Use CoachAccountable to be your one-stop shop to fully prime your brain on whomever you're coaching RIGHT NOW (or, you know, in ten minutes). If you follow the practices of the previous chapters, CoachAccountable is already going to be that one-stop shop, with no further work on your part.

Then it doesn't matter if you're coaching five people or fifty. When it's time for you to put on your coaching hat for one of them, click on their client page, review their Overview tab, skim the last few entries on the notes tab (sessions, worksheets, and journal entries), and view the current Metric graphs.

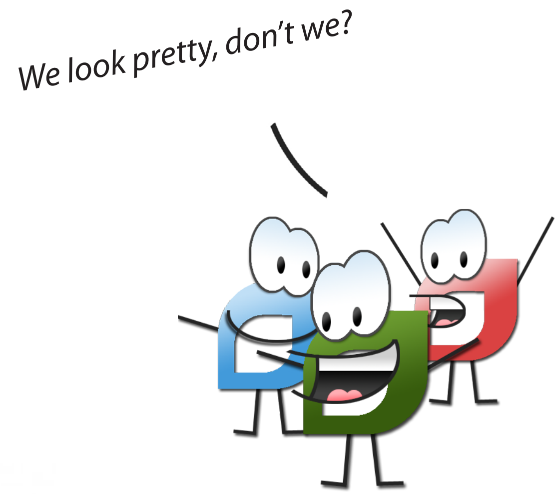
In ten minutes or less you're fully ready to coach THAT client. Then it doesn't matter how many you have: when it's time to coach one of the others you'll do the same to get up to speed with them. In this moment, you're all set to coach the current center of your attention, and all it took was clicking on their client page, glancing at a few figures and skimming a few entries.

Key Takeaways:

- Using CoachAccountable in the ways described in this manual sets it up to be the ultimate overview of the people you coach, thorough and always up-to-date.
- Whether you're coaching one person or 100, reviewing a single client page in CoachAccountable will tell you everything you need to effectively coach that client then and there.

Make It Your Own

CoachAccountable out of the box looks quite pretty already, but maybe you want it to be more... yours. Whether you do your coaching in a more corporate training environment or want your coaching platform to look more uniquely your own, you have the ability to white label your CoachAccountable platform.



White labeling is as simple as choosing your color scheme and uploading your logo and app icon, and giving it a name. The result is a completely re-skinned system that looks like your very own solution. It's like the vanity plates of coaching software.

Key Takeaways:

- You can remix the look and feel of CoachAccountable with just a few clicks.
- Use white labeling to match the existing branding of your practice or firm.

Closing Thoughts

As I finish writing this I am surprised by how much there is to share about using CoachAccountable. Though the details are plentiful, there are a few themes that more or less unify the purpose of the system:

- Get your coachees to track and be aware of their progress
- Know how it's going for the people you coach
- Keep your coachees focused and moving forward
- Document the process and results
- Maintain regular communication

These are all matters of *structure*. There are a million ways to accomplish each of these aims, and CoachAccountable is designed to make all of them as easy, automated, engaging, and fun as possible.

Use the system, and use the tips in this manual, and I promise you'll be delighted by what it does for the overall effectiveness of your already fantastic coaching.

Cheers,

John of CoachAccountable