



# Nine Foundational Coaching Strategies

**Helping clients stay motivated:**

Sometimes clients need help seeing their own capabilities and all that's possible for their lives. They may not believe that their goals are achievable. This is where your power as a coach comes into play.

Coaching Strategy	Description	Example
<b>Championing</b>	Acknowledge the client's strengths and steps they have taken. This helps remind the client that they are the owners of their success.	<i>"You accomplished X, Y, and Z since the last time we met. That's awesome. What strategies did you use to accomplish these so quickly?"</i>
<b>Reminding</b>	Sometimes we forget our own strength and what we are capable of. Reminding clients of past successes can connect them to their own resources.	<i>"You were able to accomplish A. You did it while doing B and C. That must have been challenging. This is something to be truly proud of. Is there anything you learned doing that, which could be used for your situation now?"</i>
<b>Reframing</b>	Even after financial setbacks or when goals and/or tasks are not achieved, focus on how the situation has changed and what the client is learning.	<i>"Imagine if you didn't have that emergency fund. You didn't have to use your credit card and go into debt. Now you are in a stronger position to save by not having to pay interest on the debt."</i>
<b>Uncovering Potential Obstacles</b>	Setbacks are inevitable, but it's possible to plan for them. Sharing what you know about the path toward a goal can empower and prepare your clients to take action in the face of these potential obstacles.	<i>"One of your goals is to purchase a home in the next two years. You also have a collection on your credit report, and I know that some mortgage lenders may not lend to homebuyers with collections. Collections can take several months to clear, even after they are paid off. What would like to do with this information?"</i>
<b>Timelining</b>	A client may become discouraged if they feel a goal is unreachable. Providing clarity of what intermediary steps are necessary can be motivating.	<i>"Homeownership involves four pillars of financial strength: an adequate income, a strong credit score, down payment savings and emergency savings, and taking a first-time homebuyers course. You've already taken the course and have a strong credit score. What do you want to focus on next?"</i>

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### Connecting clients to resources:

Every resource you provide should be reviewed and updated before providing it to the client. The COACH model provides a good framework for how to learn when a resource may be relevant for a client.

Coaching Strategy	Description	Example
<b>Asking Permission</b>	Before connecting clients to a resource, ask clients if they want it or are ready to access this information.	<i>"You mentioned you're having trouble tracking expenses. I know a few tools you can choose from to help you do that. Would you like to hear about them?"</i>
<b>Asking if They Have Tried It</b>	Asking for a client's input before providing resources shows respect and acknowledges their resourcefulness.	<i>"What free legal resources have you tried? I know a few I can share with you, but I want to hear what you've tried first and what your experiences were with them."</i>

### Maintaining the focus (on the client's goals):

As coaches, it's important to keep the focus of the appointment on the client's financial goals and agenda.

Coaching Strategy	Description	Example
<b>Clearing</b>	Clearing is a skill that can benefit either the client or the coach. When clients are preoccupied with a situation that interferes with their ability to be present or take action, the coach is an active listener.	Name what you are noticing and ask the client: <i>"I'm noticing that you're not as excited to get working on your goals as you were the last time we met. What's going on? Is there something that's bothering you or that you want to talk about before we get to the coaching? I'm here to listen."</i>
<b>Taking Charge</b>	Sometimes clients become lost in their circumstances and forget what matters most to them. That's when the coach needs to take charge and direct the coaching back to what is most meaningful to them.	Examples of taking charge while maintaining a respectful tone may include asking: <i>"May I interrupt?" or saying "I noticed something," and pausing for the client's reaction before adding on. Coaches may take charge of the conversation to bring in any of the other coaching strategies, such as reminding or championing.</i>

## C.O.A.C.H. Model

### C: Competency

What can a client do or what have they tried?

### O: Outcomes

What are the client's goals? What does success look like for them?

### A: Action

What can the client do next? What info, resource(s), assistance do they want?

### C.H. Checking

How can the coach best support the client in reaching their goals?