

Chapter 1: Introduction to Coaching

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Acknowledgements

This manual represents the culmination of almost nine years of work by many colleagues and collaborators. We can't go further without first acknowledging the shoulders on which we stand.

Coaching started in sports as games developed with ever more complicated rules and performance expectations. Coaches emerged who taught the game, structured training, gave feedback, and otherwise assisted people to do better. In the early 1970s, a young tennis coach named W. Timothy Gallwey wrote an extremely influential book, *The Inner Game of Tennis* (1974), which transformed the art of sports coaching with its revolutionary approach to coaching and human performance improvement. After Gallwey it wasn't enough to teach the game and give feedback; coaching had as much to do with assisting people to get out of their own way (the inner game) as with the mechanics of the outer game. With that insight, the modern coaching movement was born.

Since that time, there has been a virtual explosion of books and training on the principles and practices of coaching. It seems there is no end to where people will go with the science of facilitated human learning. Today more than 30,000 coaches have pursued coach training and serve a \$1.5 billion market – mostly executive/corporate and life coaching.

We are particularly moved by the vision of Tony Grant, PhD, the first coaching psychologist who founded the Coaching Psychology Unit at



the University of Sydney in 2000. His work inspired us to be bold enough to call this manual a coaching psychology manual.

As we've developed our coach training curriculum we've been blessed by the early and unwavering support and endorsement of the American College of Sports Medicine, particularly Walt Thompson, PhD, and Jim Whitehead, whose partnership we sought to keep us on target in aiming for the highest possible standards.

The first iteration of this manual was developed from 2000–2002 by Margaret Moore, MBA, in collaboration with Steven Jonas, MD; Gabe Highstein, PhD; Juli Compton, PhD; Sheryl Marks Brown, BA; Kate Larsen, BS; Joan Price, MA; and Tony Rodriguez. Important contributions from others followed quickly, including Walter Thompson, PhD; Robert Rhode, PhD; Lori Gray Boothroyd, PhD; Pam Schmid, BS; and Jessica Wolfson, BS. Gloria Silverio, MA, led a complete editing of the manual in 2006 as well as bringing significant and new content. Carol Kauffman, PhD, Gloria Silverio, and Jessica Wolfson helped us integrate important tenets of positive psychology throughout the manual.

The LifeTrek Coaching team, led by Bob Tschannen-Moran, MDiv, and Erika Jackson, MA, spearheaded an enormous effort in 2006 and 2007 to expand the curriculum by further integrating tenets of positive psychology, strengths-based change strategies, nonviolent communication, and relational flow (the intuitive dance of coaching). They also spearheaded the effort to structure the curriculum in accord with adult learning theory and to align the curriculum with our ACSM-



endorsed coach certification, creating wonderful checklists and guides that are incorporated into this manual.

The team which developed a theoretical model for relational flow – the intuitive dance of coaching – brought important background to support our coaching model, including Margaret Moore, David Drake, PhD, Bob Tschannen-Moran, Francine Campone, PhD, and Carol Kauffman, PhD. Carol and Margaret developed the material which is the foundation for a new chapter called Coaching Presence which teaches the being skills of coaching.

The final draft of this manual was reworked in 2007 and 2008 by Bob Tschannen-Moran and Margaret Moore. We would not have completed the manual without the tireless efforts of the Wellcoaches operations team to support all of us, led by the indefatigable and one-of-a-kind Jeff Cramer.

We want to acknowledge all of the Wellcoaches faculty members who also serve as mentor coaches, including Blaine Wilson, MS, Christina Lombardo Ray, MA, and Michael Scholtz, MS, for their dedication to teaching and mentoring coaches to master coaching competencies and for calling us to continually refine the manual.

Most importantly, our coach trainees have contributed substantively to the evolution and presentation of coaching skills and processes. They have challenged us to make them elegantly simple to practice and use. In fact, Chuck Schroeder, MS, nuclear engineer and now executive



wellness coach, even created a streamlined version of a sample well-being assessment.

All of us enjoy using these principles and practices every day to support both our own and our clients' health and well-being. Not only have we all undergone personal transformations, we are incredibly fortunate to be partners in the small and large transformations that our clients experience. It's rewarding beyond compare. Coaching is our future.

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Chapter 1

Introduction to Coaching

“I saw an angel in the stone and carved to set it free.”

— Michelangelo

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Welcome to the Wellcoaches *Coaching Psychology Manual*. This manual is designed to teach basic coaching skills and processes. When we use the term “coach” throughout the manual, we are referring to health coaches, fitness coaches, and wellness coaches.

After reading this chapter, you will be able to:

- Distinguish between wellness, health, and fitness coaches
- Distinguish among business, life, wellness, fitness, and health coaching
- Define why we need professional coaches in physical and mental wellness
- Distinguish between coaching and the expert approach of health and fitness professionals
- Define coaching and identify the value of the coach/client partnership.



- Understand the key components of coaching psychology
- Describe the Wellcoaches process of coaching
- Distinguish between coaching and therapy
- Outline a *Professional Coach Code of Ethics*
- Define Liability and Scope of Practice guidelines

What Is Coaching?

Coaching is, to quote W. Timothy Gallwey, “the art of creating an environment, through conversation and a way of being, that facilitates the process by which a person can move toward desired goals in a fulfilling manner” (2000, p. 177). When those goals have to do with health, fitness and wellness, coaching becomes a vehicle for assisting people to achieve a higher level of both physical and mental well-being.

In order to create such an environment, coaches use evocative more than didactic approaches with clients. We do more listening than talking, more asking than telling, and more reflecting than commenting.

Coaching is not mainly advising clients on how to solve problems, nor educating clients about what they should do, nor analyzing the root-causes of client predicaments. Although advising, educating, or analyzing problems are on occasion a part of coaching, they are neither the primary purpose nor approach of coaching.

Coaches are collaborative and co-creative partners in clients’ journeys to reach their visions and goals.



Distinguishing Among Wellness, Health, and Fitness Coaches

Wellcoaches has clarified the scope of three coach types in the health, fitness, and wellness arena.

Wellness coaches are credentialed health, fitness, and mental health professionals (including personal trainers, cardiac rehabilitation specialists, dietitians, health educators, physical therapists, nurses, physicians, and behavioral health therapists) who coach clients on evidence-based areas of wellness or well-being – physical activity, nutrition, weight, stress, and life satisfaction. While wellness coaching has a broad scope, coaches provide expert guidance and advice, when called for and where clients lack expert knowledge, only in the areas where they have professional credentials.

Health coaches are credentialed healthcare professionals (including nurses, nurse practitioners, physician assistants, clinical exercise physiologists, and physicians) who combine coaching with their expert knowledge to assist their patients and clients to manage medical conditions such as heart disease, diabetes, arthritis, and cancer.

Fitness coaches are credentialed exercise professionals including cardiac rehabilitation specialists, exercise physiologists, certified personal trainers, or group exercise instructors, who use coaching skills to enhance personal training and fitness instruction outcomes. Fitness coaches wear both the training and coaching hats, in order to help clients fully develop healthy lifestyles outside of exercise sessions.



Distinguishing Among Business, Life, Wellness, Health, and Fitness Coaches

Coaches today are becoming highly specialized in their areas of expertise. Corporations may hire executive coaches or business coaches to improve the performance of their executives or managers. Individuals may hire life coaches to navigate their way through a life transition (e.g., career changes or retirement) or to improve their quality of life, management of time, or sense of life passion and purpose. There is no limit to the diverse niches and specialties that coaches offer.

Although some life coaches offer health or wellness coaching, their perspective is often centered more on aligning personal goals and values with improving well-being, rather than on motivating and designing health-promoting, evidence-based mental and physical behaviors in the areas of fitness, nutrition, weight management, health risk, stress management, and life satisfaction. Wellness, health, and fitness coaches assist clients to connect the dots between who they are, who they want to be, and, to take the incremental behavioral steps that will enable them to succeed in their desired changes leading to a higher level of health and well-being. Our coaching drills down to gritty basics even as it aspires to great heights.

Remember



Since coaching psychology principles are relevant to all forms of coaching, including wellness, health, and fitness as well as business and life coaching, throughout the remainder of this manual the word “coach” will be used inclusively. It’s all about assisting clients to “move toward desired goals in a fulfilling manner” (2000, p.177).

Why We All Need Coaching

Even though this manual was written for coaches working with clients, we all share the need for partners on the journey if we hope to be healthy and well. Even coaches need coaches in order to be our best selves.

While most of us long for better physical and mental well-being, considerable evidence suggests that we're moving in the opposite direction. Consider the paradox. Despite continuous media attention devoted to healthy lifestyles, there are now more overweight people than undernourished people worldwide (WHO Fact Sheet, 2006). The situation in the US is particularly serious. A recent study shows that Americans are significantly less healthy and more overweight than Brits at the same age and socioeconomic level (Banks, et.al., 2006).

Why do we have this paradox? While obesity is a multifactorial problem, at least four factors lead us to unwisely choose quick fixes that don't last, and this jeopardizes our confidence – what psychologists refer to as self-efficacy (Bandura, 1997). First, there are the demands of everyday life, which have never been greater. Second, we face a bewildering array of wellness guidelines, products, and services, making it difficult to create a personal formula. Third, there is the challenge of navigating the inevitable obstacles to making changes, including confusion, resistance, and ambivalence. Fourth, many of us have histories of repeated failure. Most of us do not believe that we can master our weight and wellness.



We want to be well. We yearn to be in control of our health and to feel better. We want more energy. But there is an enormous gap between wanting to be well and the everyday reality of living with the physical and mental health consequences of overeating, under-exercising, and having too little down-time to recharge our batteries.

The evidence is indisputable. Being fit, strong, and having a healthy level of body fat are safe and effective breakthrough medicines which help prevent and treat almost every affliction studied, including mental health. A quote from Tal David Ben-Shahar, Professor of Positive Psychology at Harvard University, is notable: *“not exercising is a depressant.”*

Coping well with stress and increasing life satisfaction (e.g., a sense of purpose, gratitude, and meaning) are joining exercise and eating well as “lifestyle medicines.” Two thirds of healthcare costs are driven by our daily choices (Institute of Medicine, 2006) – *we are in the driver’s seat.*

But knowledge is not enough. Only one in twenty adults engage in all of the top-six health behaviors (Berrigan, 2003): regular exercise, healthful fat intake, at least five servings of fruits and vegetables daily, limited drinking, non-smoking, and maintaining a healthy weight.

Getting people to optimal wellness is at the forefront of today’s hopes and dreams of physical and mental health professionals. This is the first time in human history where being in control of one’s health and making health investments day in and day out are poised to be dominant



societal themes, just as smoking cessation was two decades ago, or sacrificing for the greater good was during World Wars I and II.

We need to learn a new life skill – developing a personal blueprint for well-being and becoming confident in our ability to implement it. Most of us don't believe we are able to master this life skill; the increasing numbers of those who choose bariatric surgery represent the face of our greatest doubts (Elfhag & Rössner, 2005).

The health and fitness industry has been working hard to help us. Never before have there been more experts, assessments, resources, guidelines, technology, books, web tools, and beautiful high-tech facilities. The wellness revolution is underway (Rochaska, et. al., 1994), with a welcome new emphasis on enabling long-term behavior change or “changing for good” (Pilzer, 2002). New interventions focus on assessing readiness to change for each health behavior, and then tailoring interventions and education to match readiness.

While all of these resources are valuable, we need more. We normally ask experts to tell us what to do, and this approach isn't ideal when we have low self-efficacy (Joos & Hickam, 1990). Experts are trained to deliver prescriptions and advice, and often work harder than we do in trying to help us. But the expert approach actually lets us off of the hook, sending the subtle message: *You aren't in charge.*

The expert approach is vital when we are facing an immediate health crisis or considering surgery. It is not ideal when we want to lose weight, reduce stress, or develop a positive and confident mindset. Delegating



to experts comes with a price: we are not in control and we aren't asked to work to find our own answers. Building confidence requires new patterns of thinking, doing, and relating.

We also need a shift in emphasis to our strengths and opportunities, building on what's working in our lives, and away from an emphasis on diagnosing and fixing what's not working. The more we focus on the latter, the more we undermine self-confidence. It makes it harder, not easier, to change when we focus on what's wrong and what's not working. Not enough positive energy and emotion are harvested to fuel the pursuit of change.

Moreover, we need to take a holistic view of health and well-being. Specialists who work in only one area, such as exercise, nutrition, or mental health, without knowledge of or reference to the others are destined to have limited effectiveness or even to cause harm. These areas are intrinsically intertwined and are most successfully dealt with all together. Most people need assistance to integrate information from multiple experts in order to decide what actions to take and how to prioritize them. People find it confusing when experts contradict each other. It is certainly not a recipe for promoting the *"I can do it!"* attitude.

There are two other important things we need. First, without a heartfelt higher purpose, there is rarely deep and lasting change – we need to connect wellness, health, and fitness to what we value most. Second, we need to develop a wellness, health, and fitness behavioral plan that is personally tailored to our circumstances and capacities.



Professional coaches have long been recognized for their skills in helping athletes, sports teams, and executives perform at their best. Now, professional coaches are assisting clients to make lasting improvements in their health and well being.

The emerging professions of wellness, health, and fitness coaches are designed to enable people to be done with quick fixes, to overcome their challenges, to master health and well being, and to make changes that last.

With a focus on building self-efficacy, professional coaches are trained to:

- accept and meet us where we are today;
- ask us to take charge;
- guide us in doing the mindful thinking, feeling, and doing work that builds confidence;
- help us define a higher purpose for health and well-being;
- uncover our natural impulse to be well;
- help us tap into our innate fighting spirit;
- address mental and physical health together;
- assist us to draw a personal wellness, health, or fitness blueprint;
- help us to set and achieve realistic goals (small victories lay the foundation for self-efficacy);
- harness the strengths we need to overcome our obstacles;
- reframe obstacles as opportunities to learn and grow;
- enable us to build a support team; and
- inspire and challenge us to go beyond what we would do alone.



What Coaching Isn't –The Expert Approach

Coaching is an especially powerful methodology when it comes to stimulating individual behavior change because it is focused on helping clients grow into becoming the experts of their own well-being. Coaches do not show up as experts who primarily:

- analyze problems,
- give advice,
- prescribe solutions,
- recommend goals,
- develop strategies,
- teach new skills, or
- provide education.

Although such expert approaches are appropriate in a coaching relationship, they are used “just in time,” and only rarely as needed. In the coach approach, the client is called to become the decision-maker and grow into the expert on the path forward as well as the final judge of success. The goal of coaching is to encourage personal responsibility, deep thinking, self-discovery, and self-efficacy. We want clients to find their own answers and to create their own possibilities rather than to be given answers or direction by the coach. Client-originated visions, plans, and behaviors are the ones that stick.

It can be difficult for health and fitness professionals, who have been trained extensively as experts and who are armed with large quantities of authoritative, knowledge and written materials to support their expert

status, to take off the expert hat and shift to the coach approach. In many cases, it can also be difficult for clients to see and to work with their coaches in a different way, since they have long been conditioned to be told what to do rather than to take charge of their own health and wellness and self-change. It is a challenge for coaches and clients alike to come from a new framework, but when the shift is made the transformations follow.

Using the coach approach, rather than the expert approach, coaches generally don't direct the client's goals and strategies (although they do guide the coaching process). Instead they engage in coaching inquiries, asking powerful and insightful open-ended questions (What? How?), rather than closed-ended questions (Do you? Will you?). They use reflections to mirror back to the client what they are hearing (You're feeling unhappy about your life balance. You want to have more energy.). And they listen, listen, and listen with empathy and curiosity.

Coaches engage the minds and hearts of clients by assisting them to discover their strengths, to clarify their values, to increase their awareness, to set their priorities, to meet their challenges, to brainstorm possibilities, and to design positive actions. Such engagement enables clients to generate a new self-concept (*who is my best self?*), to create new supports and environments (*what supports my best self?*), and to take new actions (*what manifests my best self?*). By empowering clients to find their own answers, through asking non-judgmental and provocative questions and offering powerful reflections, coaches become catalysts for lasting change.



In transitioning from the expert to the coach approach, many report the challenges as well as the rewards of:

- Asking questions with a beginner's mind - not assuming that they already know the answers.
- Not making decisions and judgment calls quickly, but allowing clients the chance to go deeper and get to important stuff.
- Not thinking about what to say next, but instead listening for the thread hanging off of a client's last words.
- Not generating quiet resistance with even a hint of know-it-all energy.
- Reading, respecting, and working with clients' emotions as the guideposts to truth.
- Not rushing clients through their "muck," but instead compassionately helping them to sit there until the desire to change gains energy.
- Not being on "automatic pilot" to ensure that a checklist gets completed, but instead being fully present to the client's reality.

These and many other shifts, described in this manual, represent the practical side of coaching psychology that can assist people to successfully master the health and wellness challenges of the present day.

Integrating the Coach and Expert Approaches

“Less is more” is a good rule of thumb for coaches when it comes to teaching, and advising. Certainly it is important for coaches to step in when clients are doing or planning to do things that will endanger their health, fitness, or wellness (such as over-exercising, exercising unsafely when injured, not following a physician’s prescription, sharing medication, or following an unhealthy diet for a lengthy period). It is also important for coaches to NOT step in to advise on areas outside their areas of evidence-based competence and professional expertise. Coaching is no place for amateur advice.

It is always a judgment call as to how and when to bring expert advice into coaching. The following considerations can assist coaches to know whether they are on the right track:

- a. Make sure clients are working at least as hard as you are.
- b. Make sure clients are talking more than you are.
- c. Make sure clients first to try to find the answers for themselves first.
- d. Ask permission to give expert advice, if you feel it is appropriate, so that the client is still in control. Offer 2-3 choices so that the client is the informed decision-maker.
- e. Speak less and speak simply – only one question or reflection at a time.



- f. At every turn in the session, stop and consider how to use the coach approach (inquiry/reflections) with the client before going to the expert approach.
- g. Balance questions with reflections so that clients don't feel like they are being interrogated.
- h. Use silence to elicit deeper thinking.
- i. If clients confirm that they need to acquire new knowledge and skills to reach their goals and visions, help clients define the path to gaining the new knowledge and skills, with input from other experts when needed.

What Coaching Isn't – The Therapy Approach

Just as coaching is different from the expert approach, so, too, is it different from therapy. One major difference is that therapy treats diagnosable disorders based on the Diagnostic and Statistical Manual of Mental Disorders 4th Edition (DSM-IV), which includes all currently recognized disorders in mental health. Coaching does not diagnose and does not work with people suffering from clinical dysfunctionality.

Coaching works with people who are already doing some things well in their lives and who wish to do better or to develop in other dimensions. That may be why many therapists are leaving practices that focus on pathology and illness in order to become coaches and counselors who focus on strengths and wellness. It's both more fun and, in many cases, more effective to stay with discovering possibilities and envisioning the future rather than resolving problems and revisiting the past.



Therapists who make the shift to coaching often report a higher sense of satisfaction and self-efficacy in their coaching work than they experienced in traditional psychotherapy. Indeed, the growing demand for coaching services suggests that clients also enjoy the coach approach and see it as an effective modality for handling the common challenges of life (Williams & Davis 2002).

In addition to the energy lift that comes from the strength-based focus that coaches follow, clients also appreciate the holistic approach that coaches take to human well-being. Most people who struggle with wellness face intertwined psychological and physical challenges that lead to ambivalence or chronic contemplation. However, therapists generally don't work on the physical side of the equation (such as designing a new eating regimen or exercise habits). Understanding this, coaches seek to work holistically with all aspects of well-being.

When coaches work on supporting a higher level of well-being, the new science of positive psychology is proving to be an invaluable resource. Through appreciative inquiry and strengths-based conversations, coaches are often able to assist clients to develop self-acceptance, a positive mindset, self-efficacy, more happiness and life satisfaction, as well as the strengths of courage, resilience, and tenacity. The exploration of positive emotional energy leads to breakthrough insights and galvanizes action.

Even those with significant health and wellness challenges, such as morbid obesity, respond to the coach approach in order to set a new path for both personal growth and managing weight.





IMPORTANT

While the coach approach supports positive mental and emotional functioning, in some cases psychological wounds go too deep or human functioning is too severely compromised by psychopathology to respond to coaching. When this happens, it quickly becomes self-evident (often from an initial assessment, see Chapter 7) and it is time to either refer a client to therapy or to work in tandem with a therapist. Here, too, it is important for coaches to not work with clients outside their areas of evidence-based competence and professional expertise.

What is Coaching Psychology?

What Is Coaching Psychology?

- The science of coaching relationships designed to optimize health and well-being, founded upon evidence-based theories and fields.

Mastering wellness, health, or fitness and developing the confidence to sustain our well-being, is a journey of personal growth. Coaching delivers a new growth-promoting relationship designed to help us master our well-being. A professional coach is our partner in defining “Point B,” and co-designing and co-navigating the journey to get there through coaching sessions, typically for three months or longer. Coaches don’t make it easy for us by giving the answers; they facilitate our self-discovery and forward momentum.



The emerging industry of professional coaching, which began nearly twenty years ago, has until recently focused on life, corporate, and executive coaching. Dozens of life and corporate coach training schools and academic programs have trained more than 20,000 coaches worldwide. Recently health, fitness, and wellness coach training programs have emerged.

Coaching psychology is vibrant and creative. Today, coaching psychology integrates more than fifteen theories and academic fields. A foundation for coaching psychology research is being built by psychologists and professional coaches in several countries.

The outcomes delivered by coaches include:

- Increased self-awareness and self-knowledge
- Acquisition of new knowledge and skills
- Attainment of personal and professional goals
- Sustainable behavior change
- Increased life satisfaction
- Increased self-efficacy
- Becoming one's best self

One's best self includes high self-esteem, the belief that one has value and self-worth, as well as self-efficacy, the belief that one has the capability to initiate or sustain desired behaviors (see Chapter 6). These behaviors may support a general sense of well-being or they may be related to specific area of health and fitness. In whatever way these



behaviors may be identified by the client, it's the job of coaches to help people become more confident, energized, positive, powerful, and to make lasting changes.

Three key components of coaching psychology used by professional coaches are values, relational skills, and coaching processes, evidence-based where possible.

1. Values

Drawing on humanistic psychology ⁽¹¹⁾, coaches believe that clients are whole (not broken and needing to be fixed), creative, resourceful, resilient, and able to gain control of health, fitness, and wellness. We are often out of touch with these abilities.

Skilled coaches believe that we are able to figure out what we want and need, and to find our way, given a safe, non-judgmental, challenging, and invigorating space. This space enables the thinking and feeling work we do to support self-determination. Aligned with Michelangelo's quotation "I saw an angel in the stone and carved to set it free," coaches help us chip away at layers of clutter to reveal "my best self."

Valuing the client's learning process more than they value their own expert knowledge, coaches help clients broaden and build their strengths (see Chapter 4). Coaches know that they don't know many of the answers, and they hold a curious beginner's mind.



2. Relational Skills

Relational skills enable coaches to engage, arouse, energize, and challenge clients to do the work needed to support desired outcomes. They include not only “doing” skills such as listening, inquiry, and reflections (see Chapter 2) but also “being” skills such as mindfulness, empathy, authenticity, affirmation, courage, zest, calm, playfulness, and warmth (see Chapter 11). Taken together, these skills enable coaches to build and sustain a close relationship and partnership with clients that promote learning and growth.

To master these relational skills, coaching psychology draws on a wide variety of domains, theories, and models including relational cultural theory, counseling psychology, appreciative inquiry, nonviolent communication, and motivational interviewing ⁽¹²⁾. These will be described throughout this manual.

Relational skills enable coaches to radiate the energy, to exude the confidence, and to structure coaching conversations so that clients come to believe they can get where they want to go. Without self-efficacy, no real learning and growth is possible.

3. Coaching Processes

Coaches employ a variety of coaching processes, often grounded in evidence-based theories. This manual makes clear the indebtedness of the coaching profession to other significant bodies of knowledge and practice. Coaches draw widely and freely from the many assessments



and approaches that foster a sense of purpose, the formation of a personal vision, the creation of plans, as well as the setting and reaching of goals.

The Transtheoretical Model (see Chapter 3) describes the stages of readiness to change, inspiring coaching processes suited to each stage. When we are struggling with weight or other wellness issues, we can be helped up the “readiness” ladder. For example, we can move from pre-contemplation (*I am not ready to think about making a change any time soon*) to contemplation (*I am thinking about making a change in the next six months*) to preparation (*I am preparing to make a change next week*).

Other bodies of knowledge that impact coaching processes include appreciative inquiry, nonviolent communication, motivational interviewing, social cognitive theory as well as a number of therapy practices such as cognitive behavioral therapy (Burns 1980); reality therapy (Glasser, 1990), choice theory (Glasser, 2001), and positive psychology (Peterson, 2006). All these are described in this manual in order to assist coaches to create a unique experience for each client that will assist them to learn, grow, and move forward in the direction of their desired goals.

In the end, however, coaching is not about following a formula. It is about the following the client in an intuitive dance known as relational flow (Moore, et.al., 2005). In moments of relational flow (the best generative moments – see Chapter 9), both coach and client are highly engaged, awake, challenged, and stretched to the outer edges of their



abilities. During relational flow clients grow in front of our eyes, and forward leaps occur.

What Brings Clients to Coaching?

Although people come to coaching for their own unique reasons, twelve themes are commonly cited by clients when they make the decision to invest in working with a wellness, health, or fitness coach:

1. Quick Fixes Over – “I’m done with quick fixes and want to make changes that last.”
2. Precious Asset – “I have decided that health is my most precious asset and I’m ready to invest for the long term.”
3. Get off the Fence – “I am fed up with sitting on a fence and want to commit to a wellness path.”
4. Not about Weight – “I realize that it’s about wellness and not weight.”
5. Be the Boss – “I want to be the boss of my health and wellness and quit delegating responsibility to others.”
6. Health Style – “I’d like to develop my unique health style rather than use one-size-fits-all approaches.”
7. Mental Game – “I know what to do and now want to master the mental game, turning intention into reality.”



8. Peak Performance – “I recognize that to reach peak performance at home and work I need peak wellness.”
9. Big Picture / Small Steps – “I know that an extreme makeover isn’t the answer and I want to take small steps which are powerful.”
10. Confidence – “I’m finished with self-doubt and want to build confidence in my ability to master wellness.”
11. Winning the Wellness Game – “I want to focus on winning the wellness game and not losing or quitting.”
12. Close the Gap – “I want to close the gap between where I am and where I want to be when it comes to my health and well-being.”

The Process of Coaching

This manual describes the Wellcoaches process of coaching in detail. It serves as an excellent starting point for new coaches and evolves as coaches expand their tool boxes. In broad strokes coaching progresses through several stages:

- Before and during the first coaching session clients provide background information through a comprehensive assessment, so that coaches are well-informed on the priorities, key issues, and

any medical limitations. Increasing self-awareness is an important goal of coaching and an assessment is an efficient approach to self-discovery in the beginning.

- Coaches and clients discuss a coaching contract so that clients understand the coaching process and expectations for the role of coach and client.
- During the first coaching session (45-90 minutes), clients commit orally to a vision and three-month plan. Clients confirm that they are ready and want to do the work to make changes in at least one area. This is also described as a health, fitness, or wellness planning session and ideally is completed once per year.
- A personal vision as well as three month priorities and behavioral goals are reviewed and agreed in detail. Clients also commit to 3-5 goals, or small steps toward the three-month goals, for the following week.
- In each subsequent coaching session, weekly or as needed, coaches and clients spend 30-45 minutes reviewing progress, elevating energy, brainstorming strategies, meeting challenges, developing solutions, generating possibilities, and agreeing on goals for the following week. During most sessions a key issue or area is explored and resolved in a “generative moment” so that the client continues on the change path (see Chapter 9).



- After a few weeks of coaching sessions, clients begin to notice some early wins and rewards, including improvements in how they feel and in their motivation to change.
- It's not uncommon, after a burst of enthusiasm in the first few weeks, for clients to encounter challenges or setbacks. Both coaches and clients work hard to help clients engage their strengths, reignite motivation, find solutions, and brainstorm possibilities for meeting these challenges in order to reach the goal of establishing new behaviors. Anticipating, welcoming, and overcoming such challenges is a critical part of mastering new behaviors. It is what turns difficulties into learning experiences.
- By the end of three months, clients typically reach more than 70% of their three-month behavioral goals and are energized and confident to commit to the next stage, whether alone or with a coach.

Coaching sessions can be done face-to-face or by telephone.

Sometimes more can be accomplished in telephone sessions than in face-to-face sessions. There are fewer distractions and the distance helps minimize the client's disruptive, negative self-talk relative to the presence of the coach. Face-to-face sessions can provide more emotional support and intimacy.

Training to be a Coach

While mastery of wellness, health, and fitness are among our highest priorities, most would agree that managing weight, fitness, and mental health are among our greatest life challenges, especially today when the environment is stacked against us. As we age, the challenges get more complex. Helping those of us whose spirits are buried under significant excess weight or haven't moved our bodies with vigor for a long time is perhaps the toughest arena the world of professional coaching faces today. It is wise, then, for coaches to seek out the best training available. This manual helps to set the bar.

It is especially important for credentialed physical and mental health professionals to be trained and certified in the coach approach. By learning how to use coaching skills and processes, experienced physical and mental health professionals can make even greater contributions to the well-being of their patients and clients. It is a task whose time has come.

Some people are natural born coaches, with amazing aptitude for empathy, inquiry, mindfulness, insight, or courage. Others have developed their coaching skills through life experience. Even the best talents, however, can benefit from formal training, mentoring, and certification (followed by years of practice, more training, and more mentoring to improve mastery). Learning and growth for coaches never stops, just as for clients – it is a lifelong journey. The coach training industry has plenty of opportunity ahead in developing more masterful coaches who assist people to become masters of their own well-being and



of their lives (Williams & Anderson, 2006). At the same time, coaches share the same journey as clients: we are all seeking to walk the talk and to “be the change we seek” (see Chapter 12).

Professional Coach Code of Ethics

There are a number of organizations which promulgate standards and ethical codes of conduct for the coaching profession. Two of the better known are the International Coach Federation (www.coachfederation.org) and the International Association of Coaching (www.certifiedcoach.org). The ICF code of Ethics is summarized in Appendix 1. For professional wellness, health or fitness coaches, the following guidelines are essential:

1. I will conduct myself in a professional manner that reflects positively on the coaching profession and serves to build the integrity of the profession in the public at large.
2. I will not intentionally make false claims about my qualifications, expertise, and experience, or about what my clients will receive during the coaching process.
3. I will refer my clients to more qualified health, coaching, medical, mental health, fitness, nutrition, or other professionals when deemed appropriate or necessary.
4. I will not diagnose illness or medical conditions nor prescribe diets, medications, or supplements (the latter are unregulated).



5. I will operate my coaching practice in accordance with local, state, and national regulations, maintain appropriate licenses, and comply with generally accepted business standards.
6. I will maintain confidentiality of my client's assessments, conversations, records, identity, and other information except as authorized by my clients or in accordance with the law.
7. I will make clear to my clients, prior to or at the initial session, the nature of the coaching relationship, agreed upon financial arrangements, and their right to terminate the coaching relationship if it no longer serves them.
8. I will create, maintain, store, and dispose of my client's records in a manner that complies with any applicable laws.
9. I will be empathetic, supportive, and non-judgmental of my clients while also challenging them to stretch beyond their comfort zones.
10. I will notify the appropriate authorities if my client discloses an intention to endanger self or others or is doing something unlawful.

Liability and Scope of Practice

We recommend the following guidelines around scope of practice which also serve to minimize liability risks:

1. As a coach or coach trainee, you should provide expert advice and teaching only in the areas where you have nationally-recognized credentials. You should also inform clients of the scope of your expert credentials and expertise.
2. If you are working with paying clients you should carry professional liability insurance which covers your coaching services.
3. For areas outside your credentials, you may want to review and point clients to the following highly recommended resources:
 - ACSM Fitness Book
 - ACSM Guidelines for Exercise Testing and Prescription
 - Sports Nutrition Guidebook (Nancy Clark)
 - Eat, Drink, and be Healthy (Walter Willett, MD)
 - Stress Management for Dummies
 - Full Catastrophe Living (Jon Kabat-Zin, PhD)
 - Authentic Happiness (Martin Seligman, PhD)
 - Flow (Mihaly Csikszentmihalyi, PhD)

Review and Discussion Questions

1. Define coaching in your own words.
2. Describe how wellness, health, and fitness coaches differ.
3. Distinguish between wellness coaching and other forms of coaching.



4. Why are professional coaches needed in the areas of physical and mental wellness?
5. Distinguish between the coach approach and the expert approach to learning and growth.
6. Distinguish between coaching and therapy.
7. Identify and explain three key components of coaching psychology used by professional wellness coaches.
8. Describe how coaching can help people master wellness.

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Appendix 1 – ICF Code of Ethics

Part One: The ICF Philosophy of Coaching

The International Coach Federation adheres to a form of coaching that honors the client as the expert in his/her life and work and believes that every client is creative, resourceful, and whole. Standing on this foundation, the coach's responsibility is to:

- Discover, clarify, and align with what the client wants to achieve
- Encourage client self-discovery
- Elicit client-generated solutions and strategies
- Hold the client responsible and accountable

Part Two: The ICF Definition of Coaching

Professional Coaching is an ongoing professional relationship that helps people produce extraordinary results in their lives, careers, businesses or organizations. Through the process of coaching, clients deepen their learning, improve their performance, and enhance their quality of life.

In each meeting, the client chooses the focus of conversation, while the coach listens and contributes observations and questions. This interaction creates clarity and moves the client into action. Coaching



accelerates the client's progress by providing greater focus and awareness of choice. Coaching concentrates on where clients are now and what they are willing to do to get where they want to be in the future. ICF member coaches and ICF credentialed coaches recognize that results are a matter of the client's intentions, choices and actions, supported by the coach's efforts and application of the coaching process.

Part Three: The ICF Standards of Ethical Conduct

Professional Conduct At Large

As a coach:

- 1) I will conduct myself in a manner that reflects positively upon the coaching profession and I will refrain from engaging in conduct or making statements that may negatively impact the public's understanding or acceptance of coaching as a profession.

- 2) I will not knowingly make any public statements that are untrue or misleading, or make false claims in any written documents relating to the coaching profession.



3) I will respect different approaches to coaching. I will honor the efforts and contributions of others and not misrepresent them as my own.

4) I will be aware of any issues that may potentially lead to the misuse of my influence by recognizing the nature of coaching and the way in which it may affect the lives of others.

5) I will at all times strive to recognize personal issues that may impair, conflict or interfere with my coaching performance or my professional relationships. Whenever the facts and circumstances necessitate, I will promptly seek professional assistance and determine the action to be taken, including whether it is appropriate to suspend or terminate my coaching relationship(s).

6) As a trainer or supervisor of current and potential coaches, I will conduct myself in accordance with the ICF Code of Ethics in all training and supervisory situations.

7) I will conduct and report research with competence, honesty and within recognized scientific standards. My research will be carried out with the necessary approval or consent from those involved, and with an approach that will reasonably protect participants from any potential



harm. All research efforts will be performed in a manner that complies with the laws of the country in which the research is conducted.

8) I will accurately create, maintain, store and dispose of any records of work done in relation to the practice of coaching in a way that promotes confidentiality and complies with any applicable laws.

9) I will use ICF member contact information (email addresses, telephone numbers, etc.) only in the manner and to the extent authorized by the ICF.

Professional Conduct With Clients

10) I will be responsible for setting clear, appropriate, and culturally sensitive boundaries that govern any physical contact that I may have with my clients.

11) I will not become sexually involved with any of my clients.

12) I will construct clear agreements with my clients, and will honor all agreements made in the context of professional coaching relationships.

13) I will ensure that, prior to or at the initial session, my coaching client understands the nature of coaching, the bounds of confidentiality, financial arrangements and other terms of the coaching agreement.



14) I will accurately identify my qualifications, expertise and experience as a coach.

15) I will not intentionally mislead or make false claims about what my client will receive from the coaching process or from me as their coach.

16) I will not give my clients or prospective clients information or advice I know or believe to be misleading.

17) I will not knowingly exploit any aspect of the coach-client relationship for my personal, professional or monetary advantage or benefit.

18) I will respect the client's right to terminate coaching at any point during the process. I will be alert to indications that the client is no longer benefiting from our coaching relationship.

19) If I believe the client would be better served by another coach, or by another resource, I will encourage the client to make a change.

20) I will suggest that my clients seek the services of other professionals when deemed appropriate or necessary.

21) I will take all reasonable steps to notify the appropriate authorities in the event a client discloses an intention to endanger self or others.



Confidentiality/Privacy

22) I will respect the confidentiality of my client's information, except as otherwise authorized by my client, or as required by law.

23) I will obtain agreement from my clients before releasing their names as clients or references, or any other client identifying information.

24) I will obtain agreement from the person being coached before releasing information to another person compensating me.

Conflicts of Interest

25) I will seek to avoid conflicts between my interests and the interests of my clients.

26) Whenever any actual conflict of interest or the potential for a conflict of interest arises, I will openly disclose it and fully discuss with my client how to deal with it in whatever way best serves my client.

27) I will disclose to my client all anticipated compensation from third parties that I may receive for referrals of that client.

28) I will only barter for services, goods or other non-monetary remuneration when it will not impair the coaching relationship.



Part Four: The ICF Pledge of Ethics

As a professional coach, I acknowledge and agree to honor my ethical obligations to my coaching clients and colleagues and to the public at large. I pledge to comply with the ICF Code of Ethics, to treat people with dignity as independent and equal human beings, and to model these standards with those whom I coach. If I breach this Pledge of Ethics or any part of the ICF Code of Ethics, I agree that the ICF in its sole discretion may hold me accountable for so doing. I further agree that my accountability to the ICF for any breach may include loss of my ICF membership and/or my ICF credentials.



Appendix 2 – Suggested Readings

From Wellcoaches Faculty and Coaches

[*The Health Seeker's Handbook: Revolutionary Advice on How to Shape Up, Trim Down, and Chill Out ... from America's #1 Health Coach*](#)

Bob Merberg

[*Just Get it Over With: A 12-week Jumpstart to Great Health in Body, Mind and Spirit*](#)

Jane Birr

[*A Step-by-Step Marketing Guide for Your Fitness Business*](#)

Debbie LaChusa

[*Anytime, Anywhere Exercise Book: 300+ Quick and Easy Exercises You Can Do Whenever You Want*](#)

Joan Price, Lawrence Kassman

[*The Busy Mom's Ultimate Fitness Guide*](#)

Cathy Moxley

[*Squeezing Your Size 14 Self into a Size 6 World: A Real Woman's Guide to Food, Fitness, and Self-Acceptance*](#)

Carrie Myers Smith

[*The Best Natural Foods on the Market Today: A Yuppie's Guide to Hippy Food*](#)

Greg Hottinger

[*How to Calm Down Even if You're Absolutely, Totally Nuts: A Simple Guide to Relaxation*](#)

Fred L. Miller

[*Talking About Health and Wellness with Patients: Integrating Health Promotion and Disease Prevention Into Your Practice*](#)

Steven Jonas, MD

[*Cholesterol Down: Ten Simple Steps to Lower Your Cholesterol in Four Weeks – Without Prescription Drugs*](#)

Dr. Janet Brill

[*The Entrepreneur Diet*](#)

Tom Weede

[Healing Moves: How to Cure, Relieve, and Prevent Common Ailments with Exercise](#)

Carol Krucoff and Mitchell Krucoff

[Progress not Perfection: Your Journey Matters](#)

Kate Larsen

[Going Home: A positive emotional guide for promoting life-generating behaviors](#)

Gregory Boothroyd and Lori Gray Boothroyd

Coaching:

[Handbook of Coaching Psychology: A Guide for Practitioners](#)

Stephen Palmer & Alison Whybrow (Eds.)

[Evidence Based Coaching Handbook: Putting Best Practices to Work for your Clients](#)

Diane Stober & Anthony Grant (Eds.)

[Positive Psychology Coaching: Putting the Science of Happiness to Work for Your Clients](#)

Robert Biswas-Diener & Ben Dean

[How coaching works: the essential guide to the history and practice of effective coaching.](#)

Joseph O'Connor & Andrea Lages

[The Inner Game of Tennis](#) and [The Inner Game of Work](#)

W. Timothy Gallwey

[Co-Active Coaching: New Skills for Coaching People Toward Success in Work and Life](#)

Laura Whitworth, Henry House, Phil Sandahl, Henry Kimsey-House

[Meta-Coaching Vol. I: Coaching Change for Higher Levels of Success and Transformation, Meta-Coaching Vol. II: Coaching Conversations for Transformational Change, and Meta-Coaching Vol. III: Unleashed! A Guide to Your Ultimate Self-Actualization](#)

L. Michael Hall (Vols I & II with Michelle Duval)



[The Handbook of Coaching: A Comprehensive Resource Guide for Managers, Executives, Consultants and HR and The Adult Years: Mastering the Art of Self-Renewal](#)

Frederic M. Hudson, Ph.D.

[Masterful Coaching](#)

Robert Hargrove

[The Heart of Coaching: Using Transformational Coaching to Create a High-Performance Culture \(2nd Edition\)](#)

Thomas G. Crane, Lerissa Patrick

[The Art of Living: The Classical Manual on Virtue, Happiness, and Effectiveness](#)

Epictetus, Sharon Lebell

[Coaching: Evoking Excellence in Others](#)

James Flaherty

[Changing for Good](#)

James O. Prochaska, John Norcross, Carlo DiClemente

[Relapse Prevention: Maintenance Strategies in the Treatment of Addictive Behaviors](#)

G. Alan Marlatt, Judith R. Gordon

[Motivational Interviewing, Second Edition: Preparing People for Change](#)

William R. Miller, Stephen Rollnick, Kelly Conforti

[The Portable Coach: 28 Surefire Strategies for Business and Personal Success](#)

Thomas J. Leonard, Byron Larson

[Change Your Questions, Change Your Life: 7 Powerful Tools for Life and Work](#)

Marilee G. Adams

[Quality of Life Therapy: Applying a Life Satisfaction Approach to Positive Psychology and Cognitive Therapy](#)

Michael B. Frisch

[A guide to possibility land: 51 methods for doing brief, respectful therapy](#)

Bill O'Hanlon & Sandy Beadle

[Appreciative coaching: a positive process for change](#)

Sara Orem, Jacqueline Binkert, and Ann Clancy



The mindful coach: 7 roles for helping people grow

Douglas Silsbee

Nonviolent communication: a language of life

Marshall Rosenberg

Self-Development:

Wherever You Go, There You Are: Mindfulness Meditation in Everyday Life and Full Catastrophe Living

Jon Kabat-Zinn

First Things First: To Live, to Love, to Learn, to Leave a Legacy

Stephen R. Covey, A. Roger Merrill, Rebecca R. Merrill

Learned Optimism How to Change Your Mind and Your Life

Martin Seligman

Authentic Happiness: Using the New Positive Psychology to Realize Your Potential for Lasting Fulfillment

Martin Seligman

Slowing Down to the Speed of Life: How to Create a More Peaceful, Simpler Life from the Inside Out

Richard Carlson, Joseph Bailey

Taming Your Gremlin (Revised Edition): A Surprisingly Simple Method for Getting Out of Your Own Way

Rick Carson

Life Makeovers: 52 Practical & Inspiring Ways to Improve Your Life One Week at a Time and Take Time for Your Life

Cheryl Richardson

It's Hard to Make a Difference When You Can't Find Your Keys: The Seven-Step Path to Becoming Truly Organized

Marilyn Byfield Paul

<p><u>The Power of Now: A Guide to Spiritual Enlightenment</u> and <u>A New Earth: Awakening to Your Life's Purpose</u> Eckhart Tolle</p>
<p><u>Mastery: The Keys to Success and Long-Term Fulfillment</u> George Leonard</p>
<p><u>7 Habits of Highly Effective People</u> Stephen R. Covey</p>
<p><u>7 Kinds of Smart: Identifying and Developing Your Multiple Intelligences</u> Thomas Armstrong</p>
<p><u>The 7 Spiritual Laws of Success: A Practical Guide to the Fulfillment of Your Dreams (based on Creating Affluence)</u> Deepak Chopra</p>
<p><u>A Brief History of Everything</u> Ken Wilber</p>
<p><u>A Year to Live: How to Live this Year as if it Were Your Last</u> Stephen Levine</p>
<p><u>The Alchemist: A Fable About Following Your Dream</u> Paulo Coelho</p>
<p><u>Anatomy of the Spirit: The Seven Stages of Power and Healing</u> Caroline Myss, Ph.D.</p>
<p><u>The Art of Happiness: A Handbook for Living</u> Dalai Lama, Howard C. Cutler</p>
<p><u>Care of the Soul: A Guide for Cultivating Depth and Sacredness in Everyday Life</u> Thomas Moore</p>
<p><u>Conversations with God: An Uncommon Dialogue (Book 1)</u> Neale Donald Walsh</p>
<p><u>Courage to Change: One Day at a Time in Al-Anon II</u> Al-Anon Family Group Head Inc.</p>



[The Dark Side of the Light Chasers: Reclaiming Your Power, Creativity, Brilliance, and Dreams](#)

Debbie Ford, Neale Donald Walsch, Jeremiah Abrams

[Emmanuel's Book: A Manual for Living Comfortably in the Cosmos](#)

Judith Stanton, Pat Rodegast

[Emotional Intelligence: Why It Can Matter More Than IQ](#)

Daniel Goleman

[Emotions in Sport](#)

Yuri Hanin

[The Feeling Good Handbook](#)

David D. Burns, M.D.

[Fire in the Soul: A New Psychology of Spiritual Optimism](#)

Joan Borysenko, Ph.D.

[The Four Agreements: A Practical Guide to Personal Freedom](#)

Don Miguel Ruiz

[Healing Heart](#)

Norman Cousins

[Be Careful What You Pray For ... You Just Might Get It, Healing Words, and Space, Time & Medicine](#)

Larry Dossey, M.D.

[Healing Words](#)

Larry Dossey, M.D.

[In Pursuit of Excellence: How to Win in Sport and Life Through Mental Training](#)

Terry Orlick

[In the Meantime: Finding Yourself and the Love You Want](#)

Iyanla Vanzant

[Man's Search for Meaning](#)

Viktor E. Frankl



Meetings at the Edge: Dialogues with the Grieving and the Dying, the Healing and the Healed

Stephen Levine

Minding the Body, Mending the Mind

Joan Borysenko, Ph.D.

Mutant Message from Forever: A Novel of Aboriginal Wisdom

Marlo Morgan

The Nature of Personal Reality: Specific, Practical Techniques for Solving Everyday Problems and Enriching the Life You Know (A Seth Book)

Jane Roberts and Robert F. Butts

The Power of the Mind to Heal

Joan Borysenko, Ph.D., Miroslav Borysenko

Practical Intuition

Laura Day

Proud Spirit: Lessons, Insights & Healing from 'The Voice of the Spirit World'

Rosemary Altea

The Psychology and Cosmology of Man's Possible Evolution

P.D. Ouspensky

Seat of the Soul

Gary Zukav

Serenity Principle

Joseph Bailey

Small Miracles of Love & Friendship: Remarkable Coincidences of Warmth and Devotion

Yitta Halberstam, Judith Leventhal

Soul Stories

Gary Zukav

Spiritual Healing

Dr. Stuart Grayson



[Spontaneous Healing: How to Discover and Embrace Your Body's Natural Ability to Maintain and Heal Itself](#)

Andrew Weil, M.D.

[There are No Accidents: Synchronicity and the Stories of Our Lives](#)

Robert H. Hopcke

[Way of the Peaceful Warrior, 20th Anniversary Edition: A Book That Changes Lives](#)

Dan Millman

[What Really Matters: Searching for Wisdom in America](#)

Tony Schwartz

[Why People Don't Heal and How They Can](#)

Caroline Myss, Ph.D.

[Your Personality, Your Health: Connecting Personality with the Human Energy System, Chakras and Wellness](#)

Carol Ritberger, Ph.D.

[The Power of Full Engagement: Managing Energy, Not Time, is the Key to High Performace and Personal Renewal](#)

Jim Loehr, Tony Schwartz

[A Primer in Positive Psychology](#)

Christopher Peterson

[The How of Happiness: A Scientific Approach to Getting the Life you Want](#)

Sonja Lyubomirsky

[Stumbling on Happiness](#)

Daniel Gilbert

[Flow: The Psychology of Optimal Experience](#) and [Finding Flow: The Psychology of Engagement with Everyday Life](#) and [Good Business: Leadership, Flow, and the Making of Meaning](#)

Mihaly Csikszentmihalyi

[Now discover your strengths](#)

Marcus Buckingham and Don Clifton



Go put your strengths to work: 6 powerful steps to achieve outstanding performance

Marcus Buckingham

Marketing:

Make a Name for Yourself: Eight Steps Every Woman Needs to Create a Personal Brand Strategy for Success

Robin Fisher Roffer

Marketing Your Consulting and Professional Services

Dick Connor, Jeff Davidson

Get Clients Now!: A 28-Day Marketing Program for Professionals and Consultants

C.J. Hayden

Getting Started in Personal and Executive Coaching: How to Create a Thriving Coaching Practice

Steven G. Fairley, Chris E. Stout

The business and practice of coaching

Grodzki, L., & Allen, W.