

## **How to do Goals Coaching: A Consultant's Perspective**

*by Royd Buchele*

Goals Coaching is the key billable area for Mastermind Consulting Network, Inc. (MCN). It is also the activity that tends to connect the whole MCN process together. A Goals Coach analyzes the client's goals and challenges, and then helps to implement the goals or brings in other consultants to work with the client company. This can help to increase billable hours dramatically. The process of goals coaching fosters an on-going relationship with the client throughout the years.

Your goal, if you accept it, is to develop 50-75 long-term clients that provide a secure income base for yourself and your family. To accomplish this, understand that you are creating a database of possible goals for each client. Some of these goals will be accomplished rapidly and others will take time. Each goal and each action step you identify with your client increases your future job security. Every moment spent with the client is an opportunity to demonstrate your concern and enthusiasm for the company. As you work through the easier tasks, you get the client used to having you there on a regular basis and increase their confidence in tackling the more difficult tasks.

### **The Power Of Goals Coaching: Who Needs Goals Coaching And Why?**

Again and again we find it is easier to accomplish something if we make a commitment to someone else rather than just to ourselves. This is the basis of Goals Coaching. The successful Goals Coach's main obsession is creating continuing project-oriented work with the client. To do this, you must discover the client's long-term goals and challenges. If this is not done, the focus tends to be on completing a specific project, and you can miss the opportunity to generate additional work with that client. On the other hand, when the consultant identifies larger goals with the client, there are always more projects on the to-do list when a particular task is completed. To survive in the consulting industry, we must open ourselves to this opportunity. Without these long-term billable clients, our work is sporadic, uncertain, feast or famine. Goals Coaching allows for greater predictability in your monthly billable since you have a regular clientele who are in the habit of working with you on a continuous basis, even to the extent of including your services in their budgets. Developing Goals Coaching skills

can be the key to your survival and success as a consultant. It is here that the work multiplies and multiplies -- and you begin to gain a certain amount of security.

Crucial in this is developing the skill of listening for the opportunities that present themselves. By asking questions and looking at the client's concerns and desires from many angles you can identify additional work for yourself as a consultant.

### **Asking the Hard Questions**

To succeed as a Goals Coach, you must be willing to ask questions that build value and clarify the action steps necessary to accomplish the identified goals. There is, however, a reluctance to ask some of the necessary questions. We tend to feel that we do not have the right to ask hard questions such as "Why is that important to you?" or "How will that help your situation?" This can be scary, but it is necessary to identify and evaluate the problem -- no different than a doctor, lawyer, plumber, or auto mechanic. You have the right to ask the necessary questions to find out what the client wants and why it is important; the right to build value in the action steps needed; the right to help the client start to take action. The client, by agreeing to work with you, has given permission to use your skills -- can you give yourself the go-ahead?

### **The Emotional Connection**

As Goals Coaches, we must establish an emotional connection with the client. This involves some risk, but is essential. It is only when the client knows that we care passionately about them that we can create an atmosphere that allows the client to tell us what they want and the real reasons for it. It may seem safer to maintain a degree of separation, but achieving success requires a deep emotional commitment to the client and the Goals Coach cannot afford to remain detached. We must have an emotional spark that unites us with the client to bring to consciousness the true needs and concerns of the client. Allow yourself to get into an enthusiastic trance. Get excited about the goals and the client's mind electricity will heat up too. You are forging a divine continuous mastermind in perfect harmony.

You need to become a cheerleader for the client and the business. Your clients will look forward to meeting with you to share their victories, and

help them make plans to further implement their Goals. Your enthusiasm is contagious and will spread throughout the organization. Clients will tell you they feel better after meeting with you, even though most of the session may have been spent on problems.

## **Goals Coaching: The Process**

There are several key items within the Goals Coaching process:

**1st:** Work with the client to set the goals -- get them clearly defined.

**2nd:** Get the goals on paper and have the client prioritize them, then add the action steps.

**3rd:** Support, in multi-faceted ways, the implementation of these goals.

**4th:** Work with the client to set new goals, then continue the process.

Within the implementation of the goals, you will constantly shape-shift from Goals Coach to Skills Trainer to Consultant as you work toward systematizing the company. You may bring in other consultants to help with specific areas. All of this is a part of Goals Coaching.

Within a one hour Goals Coaching session, you may wear a number of hats: In the first 15 minutes you might recognize what has been accomplished since your last meeting with the client. In the second 15 minutes, you may do some training on how to identify and celebrate your people's successes. In the last half hour, you could work on documenting a clearly defined procedure such as how to give proper customer service. Within this process, there is no pre-set agenda. Relying on your expertise, you are open to moving in the directions that present themselves. You are not limiting yourself to some pre-conceived idea, so you are open to finding out what is really needed and working on it with the client. You're following a tangent not knowing exactly where it may lead.

## **Setting Goals**

*The process starts with setting the goals and then the dancing begins.*

At the initial interview you ask, "What are your top five challenges?" This may be tailored to your particular area of expertise: If you are into financial planning you could ask, "What are your top five financial challenges?" or computer challenges, marketing challenges and so on. The client will pick out 3-6 goals. Prioritize these, digging deep for emotion and value. The

deeper you go, the more likely the client is to take action. Do not expect to remember the goals as they are identified; you must write them down.

Let's say the client lists out these computer goals:

1. Learn how to use my database.
2. Learn how to scan and transfer graphics.
3. Secure my computer.
4. Organize what I put into the computer.
5. Learn about how to add graphics to a document.

- Prioritize the Goals
- Next, have the client prioritize these by renumbering the goals.
- Establish Value for the Goals

Once prioritized, it is good to establish value. This is best done by taking each goal in order and asking, "Why it is that important?" For example: (Name), you mentioned that you want to learn how to use your database. Why would you say that is important?" The client replies: "I have spent \$9,000 of my time and money on this and I think I need to learn how to get the value out of my investment."

Dig deeper, asking "Why would you say that is important?" "I have risked the entire net worth of my family and company on the belief that this database will help my company."

Dig even deeper, "What will it be worth to have the database fully implemented?" "I think that if the database is properly used it will help my team to gain 10-20 more hours per week in billable."

Ask, "What is this worth?" "Probably \$30,000 a year in sales."

### **Define the Goal**

Now, define the goal, asking: "What do you want to get out of your database, how do you want to use it?" "Well, first I want to be able to run reports that will be useful. Second, I want to make sure my associates are recording their contact information every week. Third, I want to use these reports for a weekly process of opportunity finding."

Define the goal clearly now. “(Name), it seems that this could be your goal: 'I want to be trained on the database so that I can get reports I need and give them to associates to expand billable hours by 20 per week. I want to accomplish this by (date).’”

### Identifying Action Steps

A main contribution the Goals Coach makes is asking the question, “What are the action steps to accomplish this goal?” This is necessary for the success of your client and the key to having on-going work. The next step must have emotional as well as financial value for the client. Thus, you might, as a computer consultant work on Microsoft Word training with a client, completing the training in three sessions for three billable hours. Once you've done this, unless you have identified additional goals or training needs, the client assumes you're finished and that the meetings will stop. If, however, you have already identified ten other computer-related training or implementation goals, you can work for the next 20-30 weeks with the client, resulting in many additional billable hours.

The ongoing process looks something like this: With the client, you identify a number of goals, and then work with the client to achieve them. Once you achieve these goals, you identify additional goals and then work to achieve them. Once these have been achieved, you identify another set and so on. You must be in control of this process -- the client will not automatically set additional goals once the old goals are accomplished. Clients are very open to this, but they will wait for the consultant to initiate the process of identifying additional goals and action steps.

This points back to the author's experience that success is not an automatic process. We need to get rid of the false belief that the client will simply ask for more help and will identify additional areas of focus -- this is rarely the case. As consultants we must, for our own survival and the survival of our clients, continually set new goals and new areas of focus with the client. This creates a map that you and the client can travel on.

Furthermore, we should not assume that the client is aware of all the opportunities. One consultant noted that for people to make the best use of their investment in computers, they have to be introduced to areas where they would not normally venture, such as back-ups and system maintenance. When people start, they may not even be aware of all there is to learn.

Now comes the implementation point. You, as Goals Coach, have been writing down the goals and action steps as they have been identified. (You cannot expect yourself or the client to remember them.) Now you are ready to help the client implement the goals, using the action steps.

### **The Circle of Implementation**

As the Goals Coach, it is your responsibility to work with the client through the implementation, using the list of goals and action steps.

Each goal has its own character. Some are accomplished with little effort, seeming natural. The more difficult ones are earned with blood, sweat, and tears.

The key question to ask the client at the beginning of each meeting is "What has happened in the past couple of days (or weeks, or year) that you felt good about?" You will find that there will always be some identifiable progress. There are areas where we move forward without any great effort on our parts. Many times a business improves for no identifiable reason. Celebrate the success. Some of this celebration will be directed your way, with the client feeling grateful that you helped achieve it. Prompt the client to think of progress in other areas you have been targeting. You may need to refer to the list of goals you wrote earlier, so remember to bring it to every meeting.

After the celebration, go back to the prioritized list of goals and select the next focus area, defining the action steps needed. As you do this, remain open to other issues and concerns that may have arisen. For example, you may discover that one of the employees is having problems that could be addressed by providing time management training. You can then ask the client, "Is it OK for me to set some meeting times with Bob to work on prioritization skills?" (This provides you with additional billable. A key to success in our business is asking for additional opportunity.)

In helping the client accomplish their goals, creatively use the full power of your being, knowledge, and expertise. You will be connecting multiple disciplines such as mathematics, computer science, and time management; you can utilize philosophies such as Taoism, metaphysics, or pragmatism to solve problems and at the same time lead the client into new paradigms.

Goals coaching is a multi-faceted approach with many Mandela, paths, and areas to explore in a positive manner. The Goals Coach is constantly dancing in the Four Corners -- shifting back and forth, up and down, in and out, among related areas, connecting one goal to many. It is like a dance. Some parts of this dance are related. You might, for an example, dance with a job description and then dance into the operations manual, then into policies and procedures. From here, you dance into a discussion of holding people accountable and other leadership issues.

As you shape-shift across the Four Corners you jump to and fro, up and down, back and forth, in and out of this Mandela. If perfect harmony exists in the organization the Mandela dances and spins at light speed in joyful chaos. Goals Coaching is not a single process -- it is a multiplication on many levels. You are going with the client down the path of the divine and the client has many inner children and experiences that will come out. The client organization presents a world of needs, wants, and desires from the infinite insatiable soul. This is part of your job, searching out the client's will, desires and dreams. Do this well, and your goals coaching will be rewarding and ongoing.