

Syllabus

Course Overview

This course introduces and *immerses* you into the role and potential of coaching as a learning strategy. While coaching is certainly not new to education and training, it is currently one of the hottest buzzwords in organizations, whether in business or education. Unfortunately, this popularization sometimes causes coaching to be misrepresented and dismissed as "nothing new" and as failing to live up to its promises. In reality, coaching is a proven management strategy and process with great potential for improving the quality of an individual's life and workplace performance. As you will see, there has been a proliferation of publications related to coaching in numerous contexts. Professional organizations such as Coach U, the International Coach Federation, and the Coaches Training Institute have taken the lead in professionalizing the study and practice of coaching. This course will clarify what coaching really is, how it has grown as an effective method to develop persons and teams, how it works, and when to use it.

Since you registered for this course, you must have a strong interest in *doing* coaching, at least that is the assumption behind the course design. Make no mistake, you will be challenged to both *know* and *do* coaching in this course. Through reflective thought and journaling and through frequent interactions with other learners and the instructor, you will experience personal growth while deepening your understanding, appreciation, and skills inherent in the coaching process. In summary, the intent of this course is *to facilitate your personal growth* so that you will be able to more effectively model the coaching role while guiding individuals to improved self-understanding, learning, decision making, and on-the-job performance (Cashman, 2017).

This course begins with an overview of two complimentary coaching models—adaptive coaching (Bacon and Spear, 2003) and co-active coaching (Kimsey-House, Kimsey-House, and Sandahl, 2011). The course readings and activities will lead you through an assessment of client needs, explain how to initiate and manage coaching sessions, describe a variety of coaching skills and tools, and provide insight about how to close coaching relationships. You will also identify the skills needed for coaching diverse populations and cross-cultural communications. The course ends with a coaching project and your reflections on what you learned in this course as a whole and how you plan to apply it in the field.

References

Bacon, T. R., & Spear, K. (2003). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement*. Mountain View, CA: Davies-Black Publishing.

Cashman, K. (2017). *Leadership from the inside out: Becoming a leader for life* (3rd ed.). San Francisco, CA: Berrett-Koehler Publishers.

Kimsey-House, H., Kimsey-House, K., & Sandahl, P. (2011). *Co-active coaching* (3rd ed.). Boston, MA: Nicholas Brealey Publishing.

Course Competencies

(Read Only)

To successfully complete this course, you will be expected to:

- 1 Demonstrate measurable progress in developing personal character, mission, and values into the role of an authentic coach who is committed to helping others.
- 2 Analyze coaching principles and practices as effective methods to empower people to maximize their personal and professional potential.
- 3 Evaluate emerging trends, key models, principles, and procedures for successful implementation of the coaching process as a critical leadership practice in the twenty first century.
- 4 Apply the knowledge, skills and abilities of professional coaching while interacting with peers and clients.
- 5 Assess ethical, diverse demographic and cultural perspectives appropriate for coaching that lead to successful outcomes.
- 6 Analyze the scholarly literature related to communication approaches and techniques for coaching in a global environment.
- 7 Communicate in a manner that is scholarly, professional, and consistent with expectations for members of professional communities.

Course Prerequisites

There are no prerequisites for this course.

Syllabus >> Course Materials

Required

The materials listed below are required to complete the learning activities in this course.

Integrated Materials

Many of your required books are available via the VitalSource Bookshelf link in the courseroom, located in your Course Tools. Registered learners in a Resource Kit program can access these materials using the courseroom link on the Friday before the course start date. Some materials are available only in hard-copy format or by using an access code. For these materials, you will receive an email with further instructions for access. Visit the [Course Materials](#) page on Campus for more information.

Book

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International. ISBN: 9781904838241.

Library

The following required readings are provided in the Capella University Library or linked directly in this course. To find specific readings by journal or book title, use [Journal and Book Locator](#). Refer to the [Journal and Book Locator library guide](#) to learn how to use this tool.

- Bacon, T. R., & Spear, K. (2003). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement*. Mountain View, CA: Davies-Black Publishing.
- Blukert, P. (2005). *The similarities and differences between coaching and therapy*. *Industrial and Commercial Training*, 37(2/3), 91–96.
- Brause, J. (2004). *True or false? 11 myths about coaching*. *Training Journal*, 36–38.
- Cashman, K. (2017). *Leadership from the inside out: Becoming a leader for life (3rd ed.)*. San Francisco, CA: Berrett-Koehler Publishers.
- Kimsey-House, H., Kimsey-House, K., & Sandahl, P. (2011). *Co-active coaching (3rd ed.)*. Boston, MA: Nicholas Brealey Publishing.
- Williams, P. (2009). *How coaching differs from mentoring*. *Nebraska Nurse*, 42(4), 9.

External Resource

Please note that URLs change frequently. While the URLs were current when this course was designed, some may no longer be valid. If you cannot access a specific link, contact your instructor for an alternative URL. Permissions for the following links have been either granted or deemed appropriate for educational use at the time of course publication.

- Coaches Training Institute. (2012). *CTI: Resources: Toolkit*. Retrieved from <http://www.coactive.com/toolkit>
- Coaches Training Institute. (2012). *The Coaches Training Institute*. Retrieved from <http://www.thecoaches.com>
- International Coach Federation. (2011). *Ethics and regulation*. Retrieved from <http://www.coachfederation.org/about-icf/ethics/>
- *International Coach Federation. (2012)*. Retrieved from <http://www.coachfederation.org>

Suggested

The following materials are recommended to provide you with a better understanding of the topics in this course. These materials are not required to complete the course, but they are aligned to course activities and assessments and are highly recommended for your use.

Optional

The following optional materials are offered to provide you with a better understanding of the topics in this course. These materials are not required to complete the course.

Library

The following optional readings may be available in the Capella University Library. To find specific readings by journal or book title, use [Journal and Book Locator](#). Refer to the [Journal and Book Locator library guide](#) to learn how to use this tool. If the full text is not available, you may be able to request a copy through the [Interlibrary Loan](#) service.

- Clutterbuck, D. (2007). *Coaching the team at work*. Yarmouth, ME: Nicholas Brealey.
- Hall, P., & Simeral, A. (2008). *Building teachers' capacity for success: A collaborative approach for coaches and school leaders*. Alexandria, VA: Association for Supervision and Curriculum Development.
- Harkness, H. (2011). *Don't stop the career clock: Rejecting the myths of aging for a new way to work in the 21st century. [Kindle Edition]*. Garland, TX: Career Design Associates.
- Hawkins, P., & Smith, N. (2007). *Coaching, mentoring and organizational consultancy: Supervision and development*. Berkshire, GBR: Open University Press.
- Kail, R. V., & Cavanaugh, J. C. (2009). *Human development: A life-span view (5th ed.)*. Belmont, CA: Wadsworth.

External Resource

Please note that URLs change frequently. While the URLs were current when this course was designed, some may no longer be valid. If you cannot access a specific link, contact your instructor for an alternative URL. Permissions for the following links have been either granted or deemed appropriate for educational use at the time of course publication.

- Carson, R. D. (2003). *Taming your gremlin: A surprisingly simple method for getting out of your own way*. New York, NY: Harper Collins Publishers.
- Charvet, S. R. (2010). *Words that change minds: Mastering the language of influence (2nd ed.)*. Dubuque, IA: Kendall Hunt Publishing.
- Citrin, J. M., & Smith, R. (2005). *The 5 patterns of extraordinary careers: The guide for achieving success and satisfaction*. New York, NY: Crown Business.
- Coach U, Inc. (2005). *Coach U's essential coaching tools: Your complete practice resource*. Los Angeles, CA: Wiley.
- Cooperrider, D. L., & Whitney, D. (2000). *Collaborating for change: Appreciative inquiry*. San Francisco, CA: Berrett-Koehler.
- Covey, S. M. R., & Merrill, R. R. (2008). *The SPEED of trust: The one thing that changes everything*. New York, NY: Free Press.
- Covey, S. R. (2004). *The seven habits of highly effective people (rev. ed.)*. New York, NY: Free Press.

- Cox, E., Bachkirova, T., & Clutterbuck, D. (Eds.) (2010). *The complete handbook of coaching*. Los Angeles, CA: Sage.
- Dexter, J., Dexter, G., & Irving, J. (2012). *An introduction to coaching*. Los Angeles, CA: Sage.
- Dotlich, D. L., & Cairo, P. C. (1999). *Action coaching: How to leverage individual performance for company success*. San Francisco, CA: Jossey-Bass.
- Fogarty, J., & Pete, B. M. (2006). *From staff room to classroom: A guide for planning and coaching professional development*. Thousand Oaks, CA: Sage.
- Gavey, R., Stokes, P., & Megginson, D. (2009). *Coaching and mentoring: Theory and practice*. Los Angeles, CA: Sage.
- Hargrove, R. (2008). *Masterful coaching fieldbook: Grow your business, multiply your profits, win the talent war! (2nd ed.)*. San Francisco, CA: Pfeiffer.
- Hendren, A., Richarde, P., & Ruppert, A. (2007). *365 coaching questions (rev. ed.)*. Vancouver, BC: The Coaching Group.
- Hernez-Broome, G., & Boyce, L. A. (Eds.). (2011). *Advancing executive coaching: Setting the course for successful leadership coaching*. San Francisco, CA: Jossey-Bass.
- Hunt, J. M., & Weintraub, J. R. (2011). *The coaching manager: Developing top talent in business (2nd ed.)*. Los Angeles, CA: Sage.
- Jackson, P. Z., & McKergow, M. (2007). *Solutions focus: Making coaching and change S.I.M.P.L.E.* London, UK: WS Bookwell.
- Law, H., Ireland, S., & Hussain, Z. (2007). *The psychology of coaching, mentoring, and learning*. San Francisco, CA: Wiley.
- Markle, G. L. (2000). *Catalytic coaching: The end of the performance review*. Westport, CT: Quorum Books.
- O'Neill, M. B. (2007). *Executive coaching with backbone and heart: A systems approach to engaging leaders with their challenges (2nd ed.)*. San Francisco, CA: Jossey-Bass.
- Orem, S. L., Binkert, J., & Clancy, A. L. (2007). *Appreciative coaching: A positive process for change*. San Francisco, CA: Jossey-Bass.
- Pink, D. H. (2006). *A whole new mind: Why right-brainers will rule the future*. New York, NY: Penguin Books.
- Rock, D., & Page, L. J. (2009). *Coaching with the brain in mind: Foundations for practice*. Los Angeles, CA: Wiley.
- Rogers, J. (2008). *Coaching skills: A handbook (2nd ed.)*. New York, NY: McGraw Hill.
- Stober, D. R., & Grant, A. M. (Eds.) (2006). *Evidence-based coaching handbook: Putting best practices to work with your clients*. San Francisco, CA: Wiley.
- Stoltzfus, T. (2008). *Coaching questions: A coach's guide to powerful asking skills*. Virginia Beach, VA: Pegasus Creative Arts.
- Underhill, B. O., McAnally, K., & Koriath, J. J. (2010). *Executive coaching for results: The definitive guide to developing organizational leaders*. San Francisco, CA: Berrett-Koehler.
- Whitmore, J. (2009). *Coaching for performance: GROWing human potential and purpose: The principles and practice of coaching and leadership (4th ed.)*. Boston, MA: Nicholas Brealey.
- Wildflower, L., & Brennan, D. (2011). *The handbook of knowledge-based coaching: From theory to practice*. San Francisco, CA: Jossey-Bass.

Projects

Project >> Learning Journal

Project Overview

What Is a Learning Journal?

A learning journal is a personal document that records your interactions with readings and course activities. The log should be written in an informal, narrative form. Your writing should be readable, subjective, and descriptive and should include examples to support key things you have learned in this course. For example, you might include feelings, thoughtful reflections, opinions, questions, relevant personal experiences, and ideas for applications in your own professional practice.

Why Should We Journal?

There is considerable research in the fields of education and management that documents the value of reflective thinking and writing. Findings in education that support the value of journaling include those by Brownlie, Close, and Wiingren (1988); Jeroski, Brownlie, and Kaser (1990); and Costa, Bellanca, and Fogarty (1992). In the management literature, Bennis (1996), Kouzes and Posner (1998), Miller (1992), Ray and Meyers (1993), and Cashman (2000) are just a few of the respected authors who have found that individual and group decision making, creativity, problem solving, and personal growth are enhanced by reflective thought and writing.

Journaling can be used to:

- Record key ideas from a lecture, video, presentation, field experience, meeting, or reading assignment.
- Make predictions about what will happen next in a project, scenario, or experiment; or in the future of an organization, industry, or society.
- Record questions and answer them later.
- Summarize the main ideas of an article, book, lecture, video, or presentation.
- Thoughtfully reflect on the information presented.
- Connect the ideas and data presented to other subject areas or parts of one's life; for example, business or personal.
- Monitor change in a project, experiment, or event over time.
- Respond to questions posed by yourself, other learners, a boss, significant others, or your instructor.
- Brainstorm ideas and possible answers regarding current challenges, potential projects, papers, or presentations.

- Help identify challenges and problems and then discover possible alternative outcomes and solutions (A problem well-described is a problem half-solved!).
- Record important events and problem-solving techniques.
- Document progress in one's growth in understanding, insight, and development from one point in time to another.

Each week you will complete exercises in your journal. Begin with the [Learning Journal Template](#) and use this document to help you keep track of the weekly journal entries of reflections from the Cashman (2008) text and unit exercises. These reflections and exercises are meant to be completed as they appear, item-by-item, in your journal. Upon responding to each exercise in your journal, you are then able to review your responses as a whole to make overall assessments of learning and conclusions, which should also be included in your journal.

- You will submit the first installment of your Learning Journal (approximately half of it) in Unit 5. Then, you will submit the entire Learning Journal in Unit 9.
- Your final journal should be a minimum of 30 pages, double-spaced narratives.
- When you submit your final journal, it should include:
- A summary of your journal entries with 3–6 outside sources cited and listed in APA format for each installment that support your observations about the content of the reflections on leadership, the practice coaching exercises, or other articles and resources of interest related to coaching. Such topics may include but are not limited to:
 - Career development.
 - Leadership studies.
 - Coaching models, techniques, and tools.
 - Executive coaching.
 - Appreciative coaching.
 - Evidence-based coaching.
 - Coaching for performance.
 - Other related topics.
- The instructor will evaluate your journal installment using the Learning Journal project description and grading criteria.

Recommended Guidelines

Make regular entries in your journal (2–4 times a week).

Your journal entries should be somewhat in-depth, informally written, and free-flowing. Your entries can include items such as:

- Responses (observations, opinions, feelings, and conclusions) to class readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to class. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to class readings and discussions. For this, you will have to stop and face those realities, whatever they may be!

Frequency

Each time you make an entry, include the date and provide a topic heading that includes the unit number and title. In addition to the required exercises and reflections, your journal should be ongoing throughout this course. As previously mentioned, you should make 2–4 entries a week. These entries might occur during or after the reading, writing, and applied activities you complete in this course.

What Not to Do

Do not write entries that merely describe activities (that is, what you did) without any reflective thought or questioning. Be human, be real, be yourself! This means describing events and incidents in everyday language and explaining how course readings and activities connect with each other. Describe your thoughts and feelings about coaching theories, principles, and applications. You are also invited to discuss coaching challenges from the perspective of relationships, including clients, bosses, co-workers, job fit, career possibilities, and so on.

Expectations for Your Journal

In addition to the required reflections and reactions to the coaching exercises, your Learning Journal should also have the following characteristics:

- The journal should have depth and quantity. The journal should touch on major readings and course activities for the period in a meaningful and substantial way.
- The journal must be a minimum of 30 pages double-spaced (15 pages for the first installment). Each entry must be dated, with a topic heading that includes the unit number and title.
- There should be evidence of higher-order thinking (analysis, synthesis, and evaluation) and asking "tough and important" questions about your future and ongoing personal and professional development.
- The journal includes your personal reflections on current work challenges and how you might "see" them through the lens of this course. It is also important to reflect on your strengths and weaknesses, as well as thoughts and feelings about ways to enhance your effectiveness.

- The journal should include some discussion of how organizational factors and key work relationships might influence or inhibit your growth as a coach.
- The journal should be readable! Your instructor is more concerned about content than writing quality, but your writing needs to be easy to read and comprehend.
- If you have the capability and computer skills to do so, include a number of small drawings, doodles, or symbols that demonstrate right-brained thinking. These "graphics" may appear in the margins or within the text throughout the journal.

After reading your journal, your instructor should have a good idea of the realities of who you are, how you see coaching as a "tool" in your skill set, what you are thinking and feeling as a result of your learning, and how specific aspects of this course might be causing you to think and do things differently at work.

Project >> Coaching Session

Project Overview

For this project, you will produce a video or audio recording of a 30–40 minute coaching conversation with another person. You will need to get that person's signed permission to record the conversation. In addition to the recording, you will write a 4–6 page summary paper in which you analyze your coaching strategy going into the conversation, as well as the strengths and weaknesses of your attempts to apply the coaching skills and the coaching process model.

You will do this using the [Coaching Session Project Description Template](#), which calls on you to provide a level of analysis and evaluation that go beyond merely describing what happened in the session. See the grading criteria for this project for details of what is expected from you in creating your Coaching Session Project Description.

Depending on the recording method you use, you may need to submit your audio or video file via e-mail. Be sure to research and test how you will submit your audio or video file to make sure you can do so successfully before the final week of the course.

Unit 1 >> Introduction and Overview of Coaching

Introduction

Unit 1 provides an overview of the fast-growing field of professional coaching. In this unit, you will read, search the Internet, and dialogue with your instructor and other learners about coaching success stories, programs, and resources.

Since about 1995, there has been a veritable explosion of activity in the worlds of publishing, public training seminars, and conferences about coaching as a personal and professional development activity. In a nation where words like "productivity," "quality," "efficiency," "effectiveness," and "maximum performance" are lionized, coaching has been touted as that "extra edge" that can make the difference between mediocrity and excellence. Unfortunately, this popularization sometimes causes coaching to be misrepresented and dismissed as "nothing new" and "failing to live up to its promises."

While coaching is one of the hottest buzzwords in organizational life, it is still a proven human-development strategy with great potential for improving the performance and well-being of any reasonably motivated person, regardless of job, organization, or industry.

In Unit 1, you will begin the readings and reflection activities in your Learning Journal. You will visit the Web sites of some of the foremost coaching organizations and learn about the two coaching models introduced in this unit: adaptive coaching and co-active coaching. Then, you will read articles that explain the differences between coaching, therapy, and mentoring. In your journal, you will begin reflections and commitments for personal mastery, clarify your strengths and growth areas, and begin to develop a leadership growth plan in order to be able to help others meet their personal and professional goals.

Learning Activities

u01s1 - Studies

The following studies will prepare you to answer the unit discussion question and complete your Learning Journal entries.

Adaptive Coaching

- Use your Bacon and Voss text to read the following:
 - "Introduction," pages xiii–xxxiii.
 - The first half of Chapter 1: "The Contexts of Coaching," pages 1–13. (You will read the rest of the chapter in Unit 2.)

Coaching Online Resources

- Visit the following coach-related Web sites and explore the content:
 - [Coach U](#).
 - [International Coach Federation](#).
 - [The Coaches Training Institute](#).
- For the purposes of the discussion activity, take notes on the following information:
 - Key information about the coaching profession.
 - The purpose or mission of the host organization.
 - Programs and services offered.
 - Important and useful resources available.

Coaches Toolkit: Co-Active Coaching

Access The Coaches Training Institute's [Coach's Toolkit](#). (You will need to sign in with your name and e-mail address. The Toolkit resources are free to use.)

Listen to the following co-active coaching demo audio presentations:

- Demo 1: Intro from Karen Kimsey-House (0:49 seconds).
- Demo 2: Metaphor, Intuition, Accountability (19:23 minutes).
- Demo 3: Intro from Phil Sandahl (0:55 seconds).
- Demo 4: Powerful Questions, Articulating, Acknowledgment (18:09 minutes).
- Demo 5: Powerful Questions, Articulating, Acknowledgment – Summary of Key Points (1:05 minutes).

You will be using the Toolkit resources throughout the course. You may wish to download the ZIP archive of all the documents for future use.

Readings: Differentiate Coaching from Therapy and Mentoring

- Use your Kimsey-House text to read pages 164–165, "[Distinctions among Coaching, Consulting, and Mentoring](#)."
- Use your Bacon and Voss text to review pages 5–13 to recall the discussion of "The Coach as Psychotherapist."
- Use the Capella Library to complete the following:
 - Read Blukert's 2005 article, "[The Similarities and Differences between Coaching and Therapy](#)," in *Industrial and Commercial Training*, volume 37, issues 2/3, pages 91–96.
 - Read Brause's 2004 article, "[True or False? 11 Myths about Coaching](#)," in *Training Journal*, pages 36–38.
 - Read Williams' 2009 article, "[How Coaching Differs from Mentoring](#)," in *Nebraska Nurse*, volume 42, issue 4, page 9.

u01s2 - Learning Journal Project

Your Learning Journal is one of your final course projects. Refer to the Learning Journal project description for more information and help in writing your Learning Journal. Use the recommended [Learning Journal Template](#).

For this unit:

1. Use Cashman's *Leadership From the Inside Out* to read: "The Beginning of the Journey," and Chapter One, "Personal Mastery: Leading With Courage, Authenticity, and Awareness," pages 1–44.
2. In your Learning Journal, write your responses to the following Reflection exercises:
 1. "Conscious Wake-up Call," page 10.
 2. "Conscious Beliefs," page 24.
 3. "Character and Coping," page 34.
 4. "Clarifying Our Strengths and Growth Areas," page 38.
3. Then complete the responses to the "Leadership Growth Plan" on page 43.

In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u01s3 - Informational Interview Preparation

In Unit 2, you will conduct an informational interview with a professional coach. Take time now to preview the Interview a Coach study in Unit 2 (u02s3) and make plans to schedule your interview. Multiple resources are available in the Unit 2 Interview a Coach study to assist you.

u01d1 - Coaching

After completing the text readings and listening to the brief audio presentations for Unit 1, write a 150–200 word summary of the most interesting things you have learned about the coaching profession. Include a discussion of your own personal and organizational experience with coaching as an intensive process designed to help people reach their goals.

Response Guidelines

Respond to the posts of at least two other learners.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 2 >> Building Coaching Relationships with Clients

Introduction

If you are like most adults, especially those with experience in the fields of education, training, or management, Unit 2 will convince you that you already have a head start toward becoming an effective coach. For example, you may already have good listening and communication skills, and you may be skilled at building rapport and trust with a wide range of people. You may also be firmly grounded in values that have made helping others a priority to you. Finally, and most importantly, it is the hope that, if you possess a healthy amount of humility, can see, understand, and accept the differences in others. If you are firmly committed to the life-long task of personal development and performance improvement, the material in this unit (and the entire course) will resonate strongly with you.

Wherever you are in your personal and professional development, Unit 2 will introduce some key concepts and models that you can use to begin to develop your understanding of the coaching profession.

In Unit 2, you will focus on building coaching relationships with clients, review co-active and adaptive coaching fundamentals, and identify the various contexts of coaching. You will interview a professional coach and report on what you learned about coaching from this interview. In your journal, you will record reflections and commitments for purpose mastery and core values, and will continue to develop a leadership growth plan. You will also write a summary of what you learned about your coaching style and how this relates to potential clients' preferences.

Learning Activities

u02s1 - Studies

Readings: Review Co-Active Coaching Fundamentals

Use your Kimsey-House text to read Part 1: Co-Active Coaching Fundamentals:

- Chapter 1: "[The Co-Active Coaching Model](#)," pages 1–14.
- Chapter 2: "[The Co-Active Coaching Relationship](#)," pages 15–27.

Make note of the four cornerstones of the co-active coaching model, the foundations for coaching, and the co-active coaching relationship.

Readings: Consider How the Contexts of Coaching Influence Coaching Relationships

- Read the second half of Chapter 1 of the Bacon and Voss text, "The Contexts of Coaching," pages 13–23. Make note of the sections on the contexts of coaching and how the coach builds a relationship with a client.
- Also read pages 123–130 for additional components of a good coaching relationship.

u02s2 - Learning Journal Project

For this unit:

1. Use Cashman's *Leadership From the Inside Out* to read: Chapter Three: "Purpose Mastery: Leading on Purpose," pages 75–99.
2. In your [Learning Journal](#), write your responses to the following exercises:
 1. "Core Values," page 87.
 2. "Leadership Growth Plan: Purpose Mastery," page 99.

Reminder: In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u02s3 - Interview a Coach

Contact a local or national coaching organization and interview (by telephone or in person) an established professional coach. In your interview, ask this person to explain:

- Her/his professional background, how and why he/she got into coaching.
- What is most satisfying about being a coach.
- What this coach perceives to be the greatest challenge in coaching others.
- Suggestions, tips, or resources this coach might have for you in your continuing professional development as a coach.
- Be sure to take notes during the interview.

Afterward, don't forget to send a follow-up thank you note! (You may also want to find a way to keep the conversation going.)

Tips for thank you correspondence and sample thank you notes can be found at the Capella Career Center

You will discuss what you learned in one of the discussions in this unit.

To prepare for your interview, explore and make use of the following resources from the Capella University Career Center as needed. You will find everything from how to locate a professional coach to tips for conducting the interview and follow-up. You may want to bookmark them for future reference.

- Informational Interviewing: This tutorial addresses all aspects of informational interviews, including preparation, tips, and wrap-up.
- Sample Scripts: See sample scripts to reference and customize when contacting someone about a potential informational interview.
- Informational Interviewing on Campus: This resource page on Campus provides information about how to conduct an information interview, including videos, and strategies for locating people to contact for an informational interview.
- Connecting With Capella Learners and Alumni Through Social Media: An interesting resource in its own right, you might also check here if you have difficulty finding a connection through a professional association.

u02d1 - The Coach's Relationship with the Client

The readings from the Kimsey-House and Bacon and Spear texts provided different views of coaching contexts and how the coach establishes and builds a relationship with the client.

Write a 150–250 word essay that briefly explains some of the key concepts related to the contexts of coaching and how relationships are designed for the co-active and adaptive coaching models. Then compare and contrast what you believe are some of their similarities and differences. Given your Unit 1 discussion, which of these two models appears to resonate with your own experiences with coaching others or within the organizational context in which you plan to help others to reach their goals?

Response Guidelines

Respond to the posts of at least two other learners.

Course Resources

Graduate Discussion Participation Scoring Guide

u02d2 - Interview

Post a 150–200-word discussion that describes the most important or most interesting things you learned about being a coach from the person you interviewed. Explain the connection (similarities or differences) between any key facts, concepts, or principles mentioned by the person and what you have learned thus far in this course.

Response Guidelines

Respond to the posts of at least two other learners.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 3 >> Adapting to Clients' Needs and Preferences

Introduction

As you saw in the Two Minds Model described by Bacon and Voss in your Unit 1 readings (Bacon & Voss, 2012, pp. xv-xxxiii), there may be significant differences between the coach's perspective and client's perspective when establishing a coaching relationship. The coach's responsibility is to determine clients' needs and preferences for coaching and then adapt his or her style to the clients' preferences. As well, the coach needs to assess the coachability of potential clients.

In this unit, you will develop a preliminary plan to determine client needs and preferences at the onset of a coaching relationship. You will also complete a self-assessment to determine your own coaching style. To develop these plans, you will use resources in the Bacon and Voss text as well as several resources from the Coach's Toolkit provided at the Coaches Training Institute Web site. You will build on these plans in Unit 4 to plan an intake session for a new client and draft a coaching contract.

In your Learning Journal, you will record reflections and commitments for interpersonal mastery, building relationships, and a leadership growth plan for interpersonal mastery. You will also write a summary of what you learned about your coaching style and how this relates to potential clients' preferences.

Reference

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International.

Learning Activities

u03s1 - Studies

Readings

1. Use your Bacon and Voss text to read the following:
 1. Chapter 2: "Negotiating Expectations," pages 25–40. Make note of the elements of a coaching contract, information gathering requirements, and how to negotiate expectations for the coaching contract.
 2. Chapter 3: "The Needs Compass," pages 41–60. Consider the approach to determining the needs of a client.
 3. Chapter 4: "The Real Issues," pages 61–88. Explore how you would determine the coachability of a client. You will use this information in a discussion in this unit and then again in Unit 4.
2. Draft an outline of how you would determine client needs at the beginning of a coaching relationship. This outline should include the following:
 1. Activity topic.
 2. Time allotted for each activity.
 3. The purpose of the activity.
 4. A short description of the activity.
 5. Any tools you would use.

You will refine this plan in Unit 4 when you outline an intake session for a new client contract.

Review the following items from the Coaches Training Institute's [Coach's Toolkit](#):

- Corporate Client Profile.
- Professional Assessment Wheel.
- Job Performance Wheel.
- Primary Focus.

Readings: Assess Coaching Styles and Clients' Preferences

1. Use your Bacon and Voss text to read:
 - Chapter 5, "Adapting to Clients' Preferences," pages 89–120.
2. Complete the Self-Test on Coaching Style Preferences on pages 118–120. You need not retype this self-test; a photocopy would work well as your worksheet to complete the self-assessment.
 - Use the Coaching Style Preferences Self-Assessment Scoring Sheet on page 120 to score the results in preparation for a discussion on this topic.
3. Then also read about process checks on:
 - Page 33.
 - Pages 223–225.
 - Pages 234–235.
 - Review the [Process Check Job Aid](#) document.
4. In your [Learning Journal](#), write a summary of what you learned about your coaching style and how this relates to potential clients' preferences.

u03s2 - Learning Journal Project

For this unit:

1. Use Cashman's *Leadership From the Inside Out* to read: Chapter Four: "Interpersonal Mastery: Leading Through Synergy and Service," pages 101–123.
2. In your [Learning Journal](#), write your responses to the following exercises:
 1. "Reflection: Building Relationships," page 117.
 2. "Leadership Growth Plan: Interpersonal Mastery," page 124.

Reminder: In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u03d1 - Client Needs and Coachability

Present the outline you developed for Unit 3 Study 1 on how you would determine client needs at the beginning of a coaching relationship.

- Discuss how successful you would expect to be in: discovering the client's self-perceptions and sense of needs; exploring the client's real needs; and having enough information to later agree on initial steps in the client's development plan.
- Discuss what you learned about your coaching style preferences. Explain the type of coaching style preference you determined from this exercise.
- Discuss any challenges you anticipate in adapting your coaching style preferences to clients' preferences. What adaptive strategies might you use to ensure that the client you are working with is satisfied with the type of coaching you provide?

Response Guidelines

Respond to at least two other learners with helpful suggestions to improve their plans.

u03d2 - Select a Partner for Unit 4 Exercises

Select a partner from the courseroom for the upcoming activities in Unit 4. Post a discussion to inform the courseroom of your status:

- **Partner selected:** You and another learner have already identified each other as partners.
- **Partner needed:** You have not identified a partner and need the assistance of one of your co-learners as a possible partner.
- **No partner needed:** You do not have time to work with a co-learner and will complete the exercise with an adult in your home or workplace environment. (You can only use this option for one of the practice activities. See below.)

Please note:

- You must work with a different partner for each new practice activity (with the exception of Unit 6. See below).
- There are five practice coaching sessions in the course.
- You are asked to work with a different partner from the courseroom for Units 4, 5, 7, and 8.
- No courseroom partner is needed for the exercises in Unit 6.
- You are expected to work with a courseroom partner for at least three of the four practice sessions that require a partner.

Arrange a Time to Perform the Activities

See Unit 4 Study 1 for details about the exercises you and your partner will be doing together (most likely over the phone). Be sure to schedule a time during the unit when you have both had a chance to read the readings and are available to participate in the activities.

Unit 4 >> Initiating Coaching Sessions

Introduction

Coaching can be initiated in a variety of ways, ranging from clients seeking out a coach to a person with coaching skills being appointed by a manager or human resources. The coach has the responsibility to prepare for coaching by building trust and credibility with the client.

When conducting the first coaching session, the coach builds rapport and trust, explores context, and negotiates expectations. The coach also discovers the client's self-perception, shares feedback and observations, explores the client's real needs, and helps create a personal development plan with the client (Bacon and Voss, 2012).

In this unit, you will complete an outline for a plan to conduct a first coaching session using the following:

- Chapter 6: "Initiating Coaching Sessions" in your Bacon and Voss (2012) text.
- Resources from the Coaches Training Institute's Coach's Toolkit.
- The planning you developed in Unit 3 Discussion 1.

You will begin practicing the coaching skills of listening and intuition and share your experiences with others. In your journal, you will record reflections and commitments for change mastery, dealing with change, while also continuing to develop a leadership growth plan. And finally, you will write a summary of what you learned from the exercises on listening and intuition.

Reference

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International.

Learning Activities

u04s1 - Studies

Practice Coaching Skills (Session 1 of 5): Listening and Intuition

Use your Kimsey-House text to read:

- Chapter 3: "Listening," pages 29–47.
- Chapter 4: "Intuition," pages 48–62.

Then, with the partner you paired with in Unit 3:

- Complete Coaching Exercises 1 and 2 on pages 45–46.
- Complete Coaching Exercises 1 and 2 on pages 61–62.

On your own, complete:

- Coaching Exercises 3, 4, and 5 on pages 46–47.

In your Learning Journal, write a summary of what you learned from each of these experiences.

u04s2 - Learning Journal Project

For this unit:

1. Use Cashman's *Leadership From the Inside Out* to read: Chapter Five: "Change Mastery: Leading With Agility," pages 125–145.
2. In your Learning Journal, write your responses to the following exercises:
 1. "Reflection: Dealing with Change," page 142.
 2. "Leadership Growth Plan: Change Mastery," page 146.

Reminder: In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u04s3 - Plan an Intake Session for Coaching a Client

Use your Bacon and Voss text to read:

- Introduction to Part 2 and Chapter 6: "Initiating Coaching Sessions," pages 123–136.

Complete an outline of a generic plan for conducting a first coaching session for a potential client using what you learned from this chapter and what you developed in Unit 3 Discussion 1. For example, you may have a manager from work in mind when you develop this plan. (You will not work with this individual in a practice session, however.)

This intake session should take about 30–40 minutes.

Your plan will outline how you will gather information and initiate the coaching relationship. This outline should include:

- Activity topic.
- Time allotted for each activity.
- The purpose and a short description of the activity.
- Any tools you would use.

Use the Corporate Client Discovery Checklist from the [Coach's Toolkit](#) as your primary guide, along with the outline on page 130 of the Bacon and Voss text.

You may want to ask the client to complete the forms you identified in Unit 3 Discussion 1 before you meet for the first time.

You may also find the following items from the Coach's Toolkit useful:

- Coaching Agreement.
- Personal Information Fact Sheet.
- Values Clarification Exercise.
- Saboteur Clarification.

In Unit 8, you will submit a [Coaching Session Planning Form](#) that you will use for your Coaching Session Project in Unit 10. This description and plan may be a refinement of either the plan you developed for an intake session (drafted in Unit 4) or a balance or job performance session (drafted in Unit 7). This plan will be used with a potential client for the final course project, not someone you have worked with from the courseroom or from a previous practice exercise.

You may find it useful to refer to the [Coaching Concepts, Skills, Strategies, and Resources Map](#). This is a comprehensive summary that provides the "big picture" view of what is involved in each phase of the coaching process. You will continue to explore coaching concepts and skills as the course progresses.

u04d1 - Plans for Intake Session

Post your description and plan for the intake session using the combined resources you reviewed and considered for Units 3 and 4. Use the Coaching Session Planning Form Template (link located in the Resources) for this intake session as a starting point for discussing your plans for conducting the first coaching session.

Include a discussion on whether or not you found the Coaching Concepts, Skills, Strategies, and Resources Map (link in the Resources) useful in planning an intake session for a potential client. This discussion post provides you with an opportunity to share your description and to widen your perspective by reviewing other learners' plans.

Response Guidelines

Respond to at least two other learners with comments and helpful suggestions.

Course Resources

Graduate Discussion Participation Scoring Guide

Coaching Session Planning Form Template [DOC]

Coaching Concepts, Skills, Strategies, and Resources Map [DOC]

[CTI: Resources: Toolkit](#)

u04d2 - Exercises on Listening and Intuition

Describe what you learned performing the exercises on listening and intuition in Unit 4 Study 1. Include answers to the following questions:

- How successful were you in achieving Level III listening?
- How did Level III listening change the dynamics in your relationship?
- What are your listening strengths and weaknesses?
- How successful were you in using intuition?
- How did intruding change the dynamics in your relationship?
- How likely are you to be successful in using intuition and intruding as coaching skills?

Response Guidelines

Respond to the posts of at least two other learners.

Course Resources

Graduate Discussion Participation Scoring Guide

u04d3 - Select a Partner for Unit 5 Exercises

Select a partner from the courseroom for the upcoming activities in Unit 5. Post a discussion to inform the courseroom of your status:

- **Partner selected:** You and another learner have already identified each other as partners.
- **Need a partner:** You have not identified a partner and need the assistance of one or your co-learners as a possible partner.
- **No partner needed:** You do not have time to work with a co-learner and will complete the exercise with an adult in your home or workplace environment.

Please note:

- You must work with a different partner for each new practice activity (with the exception of Unit 6. See below).
- There are five practice coaching sessions in the course.
- You are asked to work with a different partner from the courseroom for Units 4, 5, 7, and 8.
- No courseroom partner is needed for the exercises in Unit 6.
- You are expected to work with a courseroom partner for at least three of the four practice sessions that require a partner.

Arrange a Time to Perform the Activities

See Unit 5 Study 1 for details about the exercises you and your partner will be doing together (most likely over the phone). Be sure to schedule a time when you have both had a chance to read the readings and are available to participate in the activities.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 5 >> Managing the Dialogue

Introduction

Coaching is conducted through the conversations that make up the dialogue between the coach and client. Dialogue is a process of discovery (Bacon and Voss, 2012, p. 137). In a co-active coaching relationship (Kimsey-House, Kimsey-House, and Sandahl, 2011), the coach and client agree to make the journey of discovery together as equal partners. As well, in the adaptive coaching model, "coaches are co-creators of their clients' journeys, and the primary tool they use is dialogue" (Bacon and Voss, 2012, p. 138). Throughout this dialogue, the coach uses skills such as asking, listening, curiosity, and powerful questions. The success of a coaching relationship depends, in large part, on the coach's skillfulness in guiding the dialogue.

In this unit, you will focus on how to apply concepts of dialogue in your coaching. You will study and practice using effective listening strategies and questions. You will also submit the first installment of your Learning Journal by the end of this week. Remember that you will share your key learning

points made in the summary of your journal along with the resources you have identified thus far. Before you submit this installment, you will write a summary of what you learned from each of the exercises on curiosity and powerful questions.

References

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International.

Kimsey-House, H., Kimsey-House, K., & Sandahl, P. (2011). *Co-active coaching* (3rd ed.). Boston, MA: Nicholas Brealey Publishing.

Learning Activities

u05s1 - Studies

Study Strategies Related to Managing the Dialogue, Listening, and Questioning

1. Use your Bacon and Voss text to read:
 - Chapter 7: "Managing the Dialogue," pages 137–156.
 - Chapter 8: "Listening and Questioning," pages 157–182.
2. Focus on how you would apply Bohm's concept of dialogue.
3. Then, make note of the effective listening strategies and types of questions that are comparable to the readings in the Kimsey-House text for this unit.

Practice Coaching Skills (Session 2 of 5): Curiosity, Powerful Questions, and Inquiry

1. Use the Kimsey-House text to read:
 - Chapter 5: "Curiosity," pages 63–77.
 - Chapter 6: "Forward and Deepen," pages 78–94.
 - Chapter 7: "Self-Management," pages 95–114.
2. Review the resource "Powerful Questions" from the Coaches Training Institute's Coach's Toolkit.
3. With the partner you paired with in Unit 4, complete the following:
 - Exercises 1–3, pages 76–77: "Curiosity, Powerful Questions, and Homework Inquiry."
4. In your Learning Journal, write a summary of what you learned from each of these experiences.

u05a1 - Learning Journal Project: Installment 1

Submit your first installment of your Learning Journal by the end of this week.

Include a summary of your journal entries with 3–6 outside sources cited in APA format that support your observations about the content of the reflections on leadership, the practice coaching exercises, and/or other articles and resources of interest related to coaching. You may cite these references within your journal entries and/or list them in the summary as an annotated bibliography.

Such topics may include but are not limited to:

- Career development.
- Leadership studies.
- Coaching models, techniques, and tools.
- Executive coaching.
- Appreciative coaching.
- Evidence-based coaching.
- Coaching for performance.
- Other related topics.

The instructor will evaluate your journal installment using the Learning Journal Project: Installment 1 Scoring Guide.

In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.

- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional reading materials listed in the course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.
- A summary of the key learning points for this first installment of your journal.

Course Resources

APA Style and Format

u05d1 - Dialogue Skills for Coaches

Post a discussion explaining which three precepts and principles of dialogue (page 141 of your Bacon and Voss text) you believe are most essential to coaching and explain why.

Then, evaluate your own dialogue skills (page 144) by identifying your current strengths as well as areas that you realize need more work. Identify examples of the structures you would anticipate needing in order to your strengthen dialogue skills for coaching future clients.

Response Guidelines

Respond to the post of at least one other learner.

Course Resources

Graduate Discussion Participation Scoring Guide

u05d2 - Curiosity, Powerful Questions, and Inquiry

Summarize what you learned from the exercises you performed for Unit 5 Study 1, as manifested in your practice coaching sessions and Learning Journal reflections about the Kimsey-House text readings.

Where do you need help? What questions do you have about these processes?

Response Guidelines

Respond to the post of at least one other learner.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 6 >> Feedback and Accountability

Introduction

This unit will explore the ways a coach advises, teaches, confronts, and encourages clients. Advising, teaching, and confronting are ways in which coaches can push clients forward toward reaching their own goals. By using encouragement, the coach can also pull clients and give positive reinforcement for their successes.

Another powerful strategy used by successful coaches involves doing process checks. The coach makes the process transparent, explaining to clients what he or she is doing and what the coach thinks the process should be. At the same time, the coach asks the clients how they feel about the coaching process and the coach continues to adapt to the needs and preferences of the client (Bacon & Voss, 2012).

In this unit, you will study and practice the coaching skills of advising, teaching, and confronting clients, including the skills of requesting, challenging, and structures. In your Learning Journal, you will record reflections and commitments for resilience mastery, building energy, and resilience, while continuing to develop a leadership growth plan. You will also discuss the coaching exercises for this unit in your journal.

Reference

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International.

Learning Activities

u06s1 - Studies

Advising, Teaching, and Confronting Clients

Use your Bacon and Voss text to read:

- Chapter 10, "Pushing and Pulling," pages 205–226. Focus on the forms of "telling" or "pushing" clients: advising, teaching, and confronting; as well as forms of moving clients by pulling them through encouragement and process checks (pages 33, 223–225, and 234–235).

Practice Coaching Skills (Session 3 of 5): Requesting, Challenging, and Structures (no courseroom partner needed)

Use your Kimsey-House text to:

- Review Chapter 6, "Forward and Deepen," pages 78–94.
 - Complete Exercises 1, 2, and 3 on page 94 on your own (no partner needed).
- Review Chapter 7, "Self-Management," pages 95–113.
 - Complete Exercises 1 and 2 on pages 112–113.
 - Complete Exercise 3 on page 113 with someone at home or at work (it is not necessary to work with someone from the courseroom for this exercise).
- In your Learning Journal, write a summary of what you learned from each of these experiences.

u06s2 - Learning Journal Project

For this unit:

1. Use Cashman's Leadership From the Inside Out to read: Chapter Six: "Resilience Mastery: Leading With Energy," pages 147–166.
2. In your Learning Journal, write your responses to the following exercises:
 1. "Reflection: Building Energy and Resilience," page 165.
 2. "Leadership Growth Plan: Resilience Mastery," page 166.

In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.

- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u06d1 - Pushing and Pulling

Discuss the conditions that you believe would warrant a coach to challenge and confront a client.

Explain how you would adapt your coaching strategies by using both the concepts of pushing and pulling in your sessions.

Response Guidelines

Respond to the post of at least one other learner with relevant feedback.

Course Resources

Graduate Discussion Participation Scoring Guide

u06d2 - Exercises

Summarize what you learned doing the exercises for this unit, as manifested in your practice coaching sessions:

- Where do you need help? What questions do you have about these processes?

Response Guidelines

Respond to at least two other learners and compare your own experiences and the key things you learned from these exercises.

Course Resources

Graduate Discussion Participation Scoring Guide

u06d3 - Select a Partner for Unit 7 Exercises

Select a partner from the courseroom for the upcoming activities in Unit 7, and post a discussion to inform the courseroom of your status:

- **Partner selected:** You and another learner have already identified each other as partners.
- **Need a partner:** You have not identified a partner and need the assistance of one of your co-learners as a possible partner.
- **No partner needed:** You do not have time to work with a co-learner and will complete the exercises with someone in your home or workplace environment (You can only use this option for one of the practice activities. See below).

Please note:

- You must work with a different partner for each new practice activity (with the exception of Unit 6. See below).
- There are five practice coaching sessions in the course.

- You are asked to work with a different partner from the courseroom for units 4, 5, 7, and 8.
- You are expected to work with a courseroom partner for at least three of the four practice sessions that require a partner.

Arrange a Time to Perform the Activities

See Unit 7 Study 1 for details about the exercises you and your partner will be doing together (most likely over the phone). Be sure to schedule a time during the unit when you have both had a chance to read the readings and are available to participate in the activities.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 7 >> Fulfillment, Balance, and Values

Introduction

The three core principles of the co-active coaching model (Kimsey-House, Kimsey-House, and Sandahl, 2011) relate to the client's desire for fulfillment, balance, and process.

The coaching process asks clients to consider what it would take to be fulfilled and what they consider to be their life purpose. "As they look for ways to have a more fulfilling life, they look at what they have... and what they don't have...and see a gap...and then look for something to fill the gap—something that will make their lives more fulfilling" (p. 117). The coach's role is to challenge clients to pursue their fulfillment through values clarification and balance coaching. "In the big picture, fulfillment is about living a life that is valued, purposeful, and alive, and balance is about choosing a life that is in action, aligned with a compelling vision" (p. 130).

In this unit, you will study and practice a balance formula—a seven-step approach that will help you lead clients from powerlessness to possibility and then to action, with the goal of creating a more balanced life. Using the readings and Coach's Toolkit resources, you will also complete the outline of a plan for conducting a client session for Balance Coaching or Job Performance for a potential future client. In your Learning Journal, you will record reflections and commitments for action mastery, building awareness, commitment, and practice, and also discuss the coaching exercises you performed.

Reference

Kimsey-House, H., Kimsey-House, K., & Sandahl, P. (2011). *Co-active coaching* (3rd ed.). Boston, MA: Nicholas Brealey Publishing.

Learning Activities

u07s1 - Studies

Practice Coaching Skills (Session 4 of 5): Fulfillment and Balance

Use your Kimsey-House text to read:

- Chapter 8: "[Fulfillment](#)," pages 117–129.
- Chapter 9: "[Balance](#)," pages 130–141. The balance formula can be adapted for either balance coaching or job performance coaching.

With the partner you chose in Unit 6, complete **one** of the following exercises from the [Coach's Toolkit](#):

- Job Performance Wheel (Coaching Job Performance).
- Wheel of Life Exercise (Coaching Fulfillment).

Then, in your [Learning Journal](#), write a summary of what you learned from this exercise.

By yourself, download the Values Clarification Exercise from the Coach's Toolkit, and complete the Values-Based Decision Matrix within this document.

- In your Learning Journal, write a summary of what you learned from this exercise.

u07s2 - Learning Journal Project

For this unit:

1. Use Cashman's *Leadership From the Inside Out* to read: Chapter Seven: "Being Mastery: Leading With Presence," pages 167–183.
2. In your Learning Journal, write your responses to the following exercises:
 1. "Reflection: Exploring the Leader Within," page 177.
 2. "Leadership Growth Plan: Being Mastery," page 184.

Reminder: In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u07s3 - Plan a Balance Coaching or Job Performance Session

Plan a Balance Coaching or Job Performance Session for a Client

1. Using the Kimsey-House readings and the Coach's Toolkit resources for this unit, complete an outline of a plan for conducting a client session for Balance Coaching or Job Performance for a potential future client. This intake session should last about 30–40 minutes. This plan should include:
 1. An activity topic.
 2. Time allotted for each activity.
 3. Purpose.
 4. A short description of the activity.
 5. Any tools you would use.
2. Use the appropriate resources from the Coach's Toolkit as your primary guides, along with the readings in Chapters 8 and 9 of the Kimsey-House text. You may plan to ask a client to complete the initial form you will use before the actual coaching session in order to save time for the coaching that will take place in this exercise.

In Unit 8, you will submit a Coaching Session Planning Form that you will use in your coaching project in Unit 10. This description and plan may be a refinement of either the plan you developed for an intake session (drafted in Unit 4) or a balance or job performance session (which you are drafting in this unit). This plan will be used with a potential client for the final course project, not someone you have worked with from the courseroom or a previous practice exercise.

You may include resources from the Coach's Toolkit according to the choice of coaching session:

Balance Coaching:

- Wheel of Life Exercise.
- Life Purpose Exercise.

Job Performance:

- Job Performance Wheel.
- Primary Focus.

You may find it useful to refer to the Coaching Concepts, Skills, Strategies, and Resources Map included in this unit. This is a comprehensive summary that provides the "big picture" of what is involved in each phase of the coaching process. You will continue to explore coaching concepts and skills as the course progresses.

u07d1 - Balance Formula

The balance formula can be adapted for either balance coaching or job performance coaching. Regarding the five-step balance formula outlined in Chapter 9 of the Kimsey-House text, which step(s) worked best for you in your practice session in this unit's study? Which step(s) proved to be the most challenging to apply?

Response Guidelines

Respond to the posts of at least two other learners and compare your experiences.

Course Resources

Graduate Discussion Participation Scoring Guide

u07d2 - Coaching Plans

Post your description and plan for a Balance Coaching or Job Performance session you may conduct with a potential client for your final course project. Include a discussion on whether or not you found the Coaching Concepts, Skills, Strategies, and Resources Map useful in planning a balance coaching or job performance coaching session for a potential client. This discussion post provides you with an opportunity to share your description and to widen your perspective by reviewing other learners' plans.

Response Guidelines

Respond to at least two other learners with comments and helpful suggestions.

Course Resources

Graduate Discussion Participation Scoring Guide

Coaching Concepts, Skills, Strategies, and Resources Map [DOC]

u07d3 - Select a Partner for Unit 8 Exercises

Select a partner from the courseroom for the upcoming activities in Unit 8, and post a discussion to inform the courseroom of your status:

- **Partner selected:** You and another learner have already identified each other as partners.
- **Need a partner:** You haven't identified a partner and need the assistance of one of your co-learners as a possible partner.
- **No partner needed:** You do not have time to work with a co-learner and will complete the exercises with someone in your home or workplace environment.

Your partner must be different for each new practice activity. There are five practice coaching sessions in the course. You are asked to work with a different partner from the courseroom for units 4, 5, 7, and 8. You are expected to work with a courseroom partner for 3 of the 4 practice sessions requiring a partner.

Arrange a Time to Perform the Activities

See Unit 8 Study 1 for details about the exercises you and your partner will be doing together (most likely over the phone). Be sure to schedule a time during the unit when you have both had a chance to read the readings and are available to participate in the activities.

Course Resources

Unit 8 >> Putting It All Together

Introduction

Process coaching is the third core principle of co-active coaching. Process coaching focuses on where clients are now and what is happening in the moment during the dialogue with the coach. "The goal of process coaching is to enhance the ability of clients to be aware of the moment and to name it" (Kimsey-House, Kimsey-House, & Sandahl, 2003, p. 142). The coach listens and notices resistance, turbulence, and things that are out of place. Process coaching is necessary to move forward and be ready to make commitments for change.

Coaching sessions begin with the activities identified in an intake session, are followed by assessing needs and agreeing on expectations, then balance coaching and process coaching. This process may take several weeks or even months. When purposely planned for, the coach closes a coaching contract by:

- Helping clients synthesize learnings.
- Articulating commitments.
- Agreeing on next steps.
- Doing a final process check (Bacon & Voss, 2012, pp. 223–235).

The coach and client may also agree to follow-up sessions to hold the client accountable for their own actions plans.

In Unit 8, you will complete a [Coaching Session Planning Form](#) in preparation for your final coaching project due in Unit 10. You will study the seven-step process coaching model (Kimsey-House, Kimsey-House, & Sandahl, 2011) and explore issues you would have difficulty discussing during process coaching. You will also identify the activities led by the coach during the closing of a coaching relationship.

You will complete one final journal entry this week—to explore issues difficult to discuss with a client during process coaching—before submitting your final journal installment in Unit 9. You can use this time to complete all activities and be ready for next week when you will share your key learning points made in the summary of your journal, along with the resources you identified in your final installment of your journal.

References

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International.

Kimsey-House, H., Kimsey-House, K., & Sandahl, P. (2011). *Co-active coaching* (3rd ed.). Boston, MA: Nicholas Brealey Publishing.

Learning Activities

u08s1 - Studies

Identify Steps for Closing Coaching Relationships

Use your Bacon and Voss text to read:

- Chapter 11: "Closing Coaching," pages 227–238. Pay particular attention to how the coach brings the coaching relationship to a close by concluding individual coaching sessions, reviewing commitments with the client, and agreeing on next steps and follow-ups to the coaching sessions.

Practice Coaching (Session 5 of 5): Process Coaching

1. Use your Kimsey-House text to read Chapter 10: "[Process](#)," pages 142–156.
2. With the partner you paired with in Unit 7, complete the following exercises to coach a client through the process phases:
 1. Review the "[Sample Dialogue](#)" on pages 150–153
 2. Follow the seven key steps for [Process Coaching](#) on pages 144–148.
3. In your [Learning Journal](#), write a summary of what you learned about your experience coaching and being coached in the process phases.

u08s2 - Learning Journal Project

In this unit:

1. Use Cashman's *Leadership From the Inside Out* to read: Chapter Eight: "Leading by Developing Self and Others," pages 185–205.
2. In your Learning Journal, write your responses to the following exercises:
 1. "Reflection: Building Awareness," page 190.
 2. "Reflection: Building Commitment," page 192.
 3. "Reflection: Building Practice," page 196.

Reminder: In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

u08a1 - Create Coaching Session Plan

Submit a Coaching Session Planning Form that you will use in your coaching project in Unit 10. (See the link in the Resources for a planning form template to use.) This description and plan may be a refinement of either the plan you developed for an intake session (drafted in Unit 4) or a balance or job performance session (drafted in unit 7).

This plan will be used with a client for the final course project, not someone you have worked with from the courseroom or a previous practice exercise. You will need to get permission from this individual to record your final coaching project session.

Course Resources

Coaching Session Planning Form Template [DOC]

[APA Style and Format](#)

u08d1 - Closing Coaching Relationships

In 150–200 words, discuss how a coach brings the coaching relationship to a close in such a way that gives each person a satisfying sense of accomplishment and closure.

Explain the purpose of a coach performing the following actions when ending the coaching relationship:

- Synthesizing learnings.
- Articulating commitments.
- Agreeing on next steps.
- Doing a process check.

What advice do you have for following up with clients when coaching sessions have ended?

Response Guidelines

Respond to the posts of at least two other learners with your comments and suggestions.

Course Resources

Graduate Discussion Participation Scoring Guide

u08d2 - Coaching Session Plans

Post your Coaching Session Plan that you will use for your final coaching project in Unit 10. This discussion provides you with an opportunity to share your description and to widen your perspective by reviewing other learners' descriptions.

Response Guidelines

Respond to at least two other learners with your comments and suggestions.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 9 >> Coaching Diverse Populations

Introduction

The studies in this unit explore cross-cultural communications and coaching related to global business, anthropology, and clinical psychology. "The goal is twofold: to help coaches develop a mind-set and the background knowledge that will help them develop the intellectual and emotional intelligences mentioned above and to suggest productive techniques for coaching clients who work with people from diverse cultural backgrounds" (Bacon & Spear, 2003, p. 237).

A second topic includes the concept of change. The purpose of coaching is to help people change to improve their performance. "Change is difficult, mysterious, and uncertain, which creates an enormous challenge for us when we try to coach others" (Bacon & Spear, 2003, p. 304). Helping clients change is one of the final topics to consider in the course. After studying a human change process, you will also review a diagnostic checklist for analyzing problems related to change failures; this will prove a helpful tool should you encounter such problems.

You will identify ways you will need to adapt your coaching style and overall approach to meet the needs and preferences of diverse populations. Lastly, you will submit the final installment of your Learning Journal, sharing your key learning points made in the summary, along with the resources you identified.

Reference

Bacon, T. R., & Spear, K. (2003). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement*. Mountain View, CA: Davies-Black Publishing.

Learning Activities

u09s1 - Studies

Readings

Use your Bacon and Spear e-text (2003) to read Part 3, "Coaching Special Populations." As you read, think about how you will need to adapt your coaching style and overall approach to meet the needs and preferences of future clients who may be different from yourself.

- Chapter 12: "[Coaching Cross-Culturally](#)," pages 231–252.
- Chapter 13: "[Coaching Women and Minorities](#)," pages 253–268.
- Chapter 14: "[Coaching Across Generations](#)," pages 269–284
- Chapter 15: "[Coaching C-Level Executives](#)," pages 285–301.

In your Learning Journal, write a description of how you plan on adapting your coaching style and overall approach to meet the needs and preferences of future clients who may be different from yourself.

u09s2 - Learning Journal Project

Use your Bacon and Voss text to read:

- Chapter 12: "Helping Clients Change," pages 243–264.
 - As you read this chapter, focus on the coaching sequence described on page 308.
 - Then, consider the checklist "Diagnosing Change Failures" on pages 262–263 to determine likely causes of change failures for yourself and those with whom you may have a coaching relationship.
 - In your [Learning Journal](#), discuss which of the six change failures are most critical to successful coaching.

As suggested in the text, think back to a key change you wanted to make in your life or work but were unable to—some skills you wanted to develop but didn't, something you resolved to do differently or better but couldn't, or something new you wanted to learn but haven't. Go back through this diagnostic checklist and ask yourself, "Where did I falter? Why wasn't I able to follow through?"

Then, try the same test with someone you coached in the past or are coaching now, someone who is not improving as you'd hoped or who intended to make a change but didn't. Where did this person falter? Why wasn't he or she able to follow through? What happened that prevented the change? Where in the human change process did the breakdown occur?

What are the implications for your own leadership development or ability to help others change and meet their personal goals?

u09s3 - Reminder: Coaching Session Final Project

Next week you will turn in your recorded coaching session and your 4–6 page summary paper using the [Coaching Session Project Description Template](#). Continue to develop your project this week. Depending on the recording method you use, you may need to submit your audio or video file via the courseroom. **Be sure to research and test how you will submit your audio or video file before next week.**

u09a1 - Learning Journal Project: Final Installment

Submit your final Learning Journal by the end of this week. Include a summary of your journal entries with 3–6 additional outside sources cited in APA format that support your observations about the content of the reflections on leadership, the practice coaching exercises, or other articles and resources of interest related to coaching. You may cite these references within your journal entries and/or list them in the summary as an annotated bibliography.

Such topics may include but are not limited to:

- Career development.
- Leadership studies.
- Coaching models, techniques, and tools.
- Executive coaching.
- Appreciative coaching.
- Evidence-based coaching.
- Coaching for performance.

- Other related topics.

The instructor will evaluate your journal installment using the Learning Journal project description and grading criteria.

Reminder: In addition to the required journal assignments, your Learning Journal should also include:

- Responses (observations, opinions, feelings, and conclusions) to course readings, discussions, presentations, and activities.
- Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions. Connections between course activities and work, as well as descriptions of work events related to the course. These connections should be examples of higher-order critical thinking: analysis, synthesis, and evaluation.
- References of 3–6 resources beyond the required readings. (See the list of optional readings located in course materials as a launch point for your research.)
- Discussions about the realities of your personal and work experiences and feelings that are related to course readings and discussions.

Course Resources

[APA Style and Format](#)

u09d1 - Adaptive Coaching for Diverse Populations

Consider one or more of the special populations described in Part 3 of the Bacon and Spear text. Post a 250–300 word discussion that describes how the world view of this population may be different from your own. What, in your view, are some of the implications for coaching individuals from this population? What principles of effective coaching would you recommend? Explain why.

Response Guidelines

Respond to the posts of at least two other learners.

Course Resources

Graduate Discussion Participation Scoring Guide

Unit 10 >> Coaching Session Project and Reflection

Introduction

This course began with an overview of two complimentary coaching models: adaptive coaching (Bacon & Voss, 2012) and co-active coaching (Kimsey-House, Kimsey-House, & Sandahl, 2011). The course readings and activities led you through a number of valuable processes, including how to develop an assessment of client needs, how to initiate and manage coaching sessions, how to use a variety of coaching skills and tools, and how to close a coaching session. You planned for an intake session and balance coaching with the option of a job performance coaching session. You identified skills needed for cross-cultural communications and coaching diverse populations.

In Unit 10, you will submit your final coaching session project and have the opportunity to receive feedback. You will also reflect on what you learned in this course as a whole, how you plan to apply coaching in your professional practice, and what plans you may have for continuing professional development.

References

Bacon, T. R., & Voss, L. (2012). *Adaptive coaching: The art and practice of a client-centered approach to performance improvement* (2nd ed.). Boston, MA: Nicholas Brealey International.

Kimsey-House, H., Kimsey-House, K., & Sandahl, P. (2011). *Co-active coaching* (3rd ed.). Boston, MA: Nicholas Brealey Publishing.

Learning Activities

u10s1 - Studies

Reading and Audio

- Use your Kimsey-House text to read Chapter 11: "[Putting It All Together](#)," pages 157–171. Pay particular attention to the commitments needed for a coach. As a potential professional coach, consider the formats or coaching models you may use in the future, how you may serve as a coach within your own organization, or with coaching as a complement to your other work as a consultant.
- Visit the Coaches Training Institute's [Coach's Toolkit](#) and listen to author Phil Sandahl's "Summary of Key Points" audio presentation. (See bottom right corner of Web page.)

u10s2 - Review Coaching Ethics, Competencies, and Standards

Review the sections on ethics, competencies, and standards as listed on:

- The International Coach Federation's "[Ethics and Regulation](#)" page.
- "Ethical Standards" document from CTI's [Coach's Toolkit](#).

Be thinking of the competencies and standards you already possess as well as those that need to be developed through continuing professional education and training.

u10a1 - Coaching Session Final Project

Your final project includes two essential components:

- The audio or video file of the coaching session.
- Coaching Session Project Description (see Resources for a template document to work from).

Submit the written component of your coaching session project as an attachment in the assignment area. Depending on the recording method you use, you may need to submit your audio or video file through e-mail. You should have tested your method of transmitting this file to the instructor in Unit 9 at the latest. It is your responsibility to ensure that the final coaching project file is available for review by the instructor by the last day of the course.

Course Resources

[Coaching Session Project Description Template \[DOC\]](#)

[APA Style and Format](#)

u10d1 - Professional Development Plans

Using the readings from the Kimsey-House text, the ethics, competencies and standards developed by the ICF, and your Learning Journal insights about your own leadership potential, discuss plans you have for either serving as an internal coach in your organization or as a professional consultant providing coaching to clients. What further training and certification plans do you have to continue your professional development in the coaching field? Share any insights or recommendations you may have for your peers regarding how you may be able to add coaching to complement your other professional responsibilities.