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Welcome to coach to coach a podcast dedicated to showcasing the power of coaching. I'm your host, dr Katie Linder, and I offer coaching to academics and higher education professionals to bring more ease to their lives and work. Before you dive into this episode. Here's a quick introduction to the structure of the show.

In each season of coach to coach, a new guest coach will come on the show to demonstrate a range of coaching tools and strategies. The first episode will offer you an introduction to the guest coach. Then I'll coach the guest and they'll coach me for the next six episodes and always on real topics and issues we're dealing with in our own lives.

Each season we'll end with a debrief episode where we'll talk about how the season went. And offer any updates on the topics covered in earlier episodes. It might make the most sense to start each season in the beginning and listen to the episodes in order this season. I'm delighted to introduce you to dr ball.

He supposed specializes in helping ambitious, perfectionist get out of their own way so that they can experience greater joy and fulfillment in their careers. Now onto the episode that evening, it's about how are you. I am doing well, Katie. Thank you. How about yourself? Good. As we record this, it is after work for both of us, so I am glad that you're taking the time to chat with me tonight and this is a session where you are going to coach me, so I'm going to go ahead and turn things over.

Deal. All right, thanks. Yes, so I am looking forward to this. Katie. As you know, you've been an important part of my coaching journey, so this is really fun that this is where it's taken us to date and I wanted to check with you what you would like to focus on this evening. Yeah, so I was thinking about this and I am in the process of trying to figure out kind of some new onboarding and kind of engagement with.

Particularly my coaching clients, um, and kind of a new systems and process for this. And I thought it would be useful to try to figure out kind of, what am I trying to do with that. I haven't, I feel like I haven't had a chance to kind of really give some attention to it and the way that I want. I have kind of notes here and there and I've been kind of thinking about it, but I thought it might be nice to have some dedicated time to try to figure out kind of.

What is it that I'm actually trying to do? Why is it important for me to do this work of kind of redoing some of these systems and then maybe what are some of the to do that would be coming out of this in terms of next steps, because it's kind of a, what I'm envisioning. I think it will take some time, so I want to think about it maybe in terms of phases so that I'm not completely overwhelmed having to do at all.

Okay. So you want to look at some of your onboarding processes more around front of the lens of like, what am I trying to do? Why is this important? And then possibly generate a list of a few. first steps detailed. Okay. And so in terms of what a successful session would look like by the end of, um, our, our coaching time together.

What make you feel that this was valuable? This was a good use of your time. I mean, I think part of it is really just thinking through it. Like even just setting aside the time, just like doing it at all, it's going to feel successful to me. Um, but also I would say, you know, giving myself a little bit of a rationale of, you know, why, why this, why now?

Um, and. Also just feeling like, um, when I am making decisions about what to do, it feels like the right decision. You know? Like there is reasons behind it, why I would go in one direction versus another direction. All right.

Where would you like to, ah, well maybe it would be helpful to know like why this is significant right now. Um, like what problem is it solving? Cause that's kind of where my head is starting is like, I don't usually do these kinds of changes unless there's a pain point. Um. So, basically what has happened is, um, and this'll give you a, for everyone listening, this is like the behind the scenes a little bit if I've, so I've reached a point now where I'm juggling about 40 coaching clients, um, and I was feeling kind of some challenge of logging hours, you know, making sure I was tracking everything, you know, and that I was tracking notes for clients and all of that.

And, um, I. When I counted, I didn't know how many clients I was working with, and then I counted them and I was like, Oh, this is why. Like I have all these clients that I didn't realize I had this many. And to be clear, I'm not meeting with every client every week. So this is. Clients that have maybe one session with me because they did a group coaching program and they're not necessarily like a package client of six to 12 sessions.

They're just, they have a one off and I need to make sure to remind them on a consistent basis that they have that if they want to use it, you know, those kinds of things. I also include people who are in my group coaching programs as my clients, so I sometimes run group coaching programs and that would be partly what's contributing to that volume.

But when I realized that I was having trouble tracking my hours, which, um, as some are, some of our listeners may know, this is what ICF who were certified through, you need to track your hours to like level up your certification and those kinds of things. Um, that was a pain point for me. And then also, I honestly just want to do better by my clients in terms of having a system.

Oh, a place that they can go where their notes are, where they can be reminded of what we talked about, where I can assign certain things like maybe a reading or a resource that would be useful for them. And I didn't feel like I had a systematic way of doing that. I had certain systems I was using with certain clients, but then depending on how a client came to me, it wasn't always consistent and that didn't feel.

I feel like I'm past the point where I should have got these systems in place to make it feel professional and to really be serving my clients the best of my capacity. Hmm. And so the question you said, what problem is this solving where the, this would be the new system, is that correct? Yeah, yeah. Or profess

So if you had to really pare that down, what problem would this solve? I think it would be inconsistency because when it's inconsistent, I don't always know where to find things, and I need to at least know so that I can get it to my client. Um, and yeah, so inconsistency

I'm trying to think of how you might distinguish that from something else. So aye, what I mean by that is. You're trying to solve the problem, inconsistency, and you want it to be what? It's easy to for me to want to fill in that blank, but I want, I'm curious what, what is it that you want? Yeah. When I think about a system that's successful, it's something I can trust.

Okay. So I'm looking for it. Like the easy answer would be, well, it would be consistent. That's the . But really what I think we're getting to, I liked the way you frame that question because I really think that this is about trusting and knowing that when I go to the system, I know exactly what the steps are.

Everybody goes through it in the same way. I know, you know the process of onboarding people into that system, you know, all of that is going to feel. It's going to feel systematic so that I trust it, but also so that my clients trust the process. Like trust is such a big part of working with a coach that I want them to feel like, yeah, I've got this.

You know, like this. I'm going to walk you through exactly how we're going to do this and this is a system that you can trust and that is going to help you to reach your goals because we are always going to know where the notes are, where the resources are. When the next appointment is what, where, what the zoom room link is, you know, those kinds of things.

Um, and then my clients aren't going to struggle to be like, where was that? Is that an email chain? Is that in a Google drive doc? You know, like, where are these things? You know, like they need to be able to trust the system too. your clients won't struggle. They'll trust the system. systematic

I know you've been doing some thinking about this and you mentioned that making the time to think about it was one of the big sort of hurdles at at this time.

And I'm wondering what you need in order to take care of that. I mean, you need to, so this is one step, having this conversation and, and hopefully will lead to some further clarity. What are your needs around, around us at this time? It's a good question. I would say one need is. Whatever I decide to do to break it down into manageable pieces because I think this is potentially something.

So I have 40 active clients, but I also have a number and I don't know what it is off the top of my head. Probably an equal number to that of clients that have worked with me in the past that may return to work with me in the future. And I think that whatever this is that I'm going to implement, I want to maybe even use it to archive like past notes and things that have already been created from these past appointments.

In the off chance that someone comes back, you know, like, I want everyone in the system. Whatever it is that gets created. So to me, like when I think about that, that just feels overwhelming. Like I'm not even sure where to start. Do I start with the archiving of people who aren't. With the anymore? Do I start with the current clients?

In which case, how do I communicate to them that we're doing something new? Do I start with the people who are brand new and wouldn't know any different, and then I just kind of work backwards from there? You know, like I have a lot of questions around what is this, the process through which I would actually implement something that looks different.

So that it's done in a way that's not confusing either to me or to the clients. And given that they're all kind of the different stages of working with me, I don't want to just kind of throw something else at them, you know, like I want it to feel integrated, I guess would be a word. Um, and that, that it wouldn't feel like one more thing or, you know, that it wouldn't feel inconvenient to them.

I mean, I, I certainly want it to feel easy, whatever it is that we do. Um. So all of those things are kind of floating around. So when I think about what I need, the process piece feels really important to me because when I can break something down into manageable pieces, it becomes easy for me to like schedule it into my calendar of when I'm going to do things.

Um, and how long it might take me. Because the other piece of this is, I assume it will be time consuming, you know, like to, to develop these systems and then to implement them. Like it will actually take time to kind of track things down and put them in the right place. And you know, all of that. So, so one thing would be process, and as I'm kind of talking through this, the other thing I think would be kind of a comprehensive list of what is it going to take to do this?

So for example, will I need to draft an email to my current clients explaining what this is and talking them through the steps of what it, what it looks like. I'm willing to have an onboarding. Email for new clients that kind of walks them through the system and what this looks like. Willing to update my website about coaching to explain that I use a particular process.

If I feel like it would be a marketing tactic to people who might want to coach with me. Um, is there a way to close out this system? If somebody stops coaching with me or they, they finish their coaching engagement, what do I do then? Um, so there's these like steps that I want to think through and it will, I think.

Maybe even give me a false sense of control over this situation. Just to know in general what, what, what's really in this in terms of the kinds of things I might need to create or check, check off my list, you know, as I'm going through this process. Okay. You've mentioned you've used the word manageable chunks or some equivalent, um, a few times.

That feels like a really, really important piece. Yes. And it was interesting when I asked you what you need, you initially answered by stating what needs it would mean for your clients. I want to go back really to your needs around the manageable chunks. Do you think that, um. That piece will also help you with deciding on the system.

Like I guess what I'm trying to get at is what order do you see as being necessary first, kind of generating the type of list that you just did and then picking it, whatever it is, or vice versa. That's a really good question because I could see it, and this is, I think what, it's confusing. It's like a chicken or an egg problem.

So one task, for example, could be, I need to choose, and I kind of have already done this. I've made some notes about what is the problem that I'm trying to solve and what is the system that would help me to solve that thing? Like what, what needs to be included. I can't really pick a system until I know the features I'm looking for, if that makes sense.

So I do feel like there is an order to some of this stuff, but I won't know kind of the domino effect of the system until I've chosen it. So there is this kind of sense of like, there is a before and after, I guess of when I make a move in a certain direction. There will be certain things that come out of that in terms of like, Oh, well if, if I decided to go with, for example, free tools like Google drive that is, and I'm kind of cobbling some things together that is a different system then going with like a product that has been created for the purpose of.

Logging, coaching client sessions, you know, like those products exist like out of the box. Um, and it would require me to set up different things based on which direction I would go. So, um, I think I do need to review that list of like, what was it that I was looking for in terms of features before I can make that decision.

And then there will be all kinds of things that result from it.

I was having mixed feeling about this question, but I do think it's a, I do think it's a powerful question and I know you're very familiar with it. It's the being question, right? Who do you need to be in order to move forward in a way that feels good to you?

So this is a great question to ask because like, as soon as you, um. Brought that up like immediately. What my thought was was I just need to be like who I naturally am because I am a systems person. Like this is like where I, you know, I can just revel in this. I love doing this kind of stuff. This actually brings me a lot of joy and pleasure to create systems that make things efficient, that are helpful to my clients.

Like. This is me just easing into something that feels very natural to me. Um, and this is why there's so much discomfort around it because it's like, this is not how I would normally do things like this is, this is something that the systems need to change because the volume of what I'm doing has shifted.

The systems that used to work, that I put together in the beginning are no longer functioning for me. So I think in terms of who I need to be, it's basically just I need to be myself. Like I need to look at this with my systems thinker hat on and just allow for that strength to take over in terms of figuring out what needs to happen here.

I think what's been challenging about it, and you kind of alluded to this earlier. Is I've had to do this kind of, um, in pieces just because I haven't had a lot of time. So part of what this conversation is doing for me is allowing me to kind of bring pieces together and to realize, actually I do have a lot of thoughts about this, and I do have, I think, a really close idea of what I want.

I just haven't been able to kind of make the moves because. I haven't had a moment to synthesize it. So this is really allowing me to do that synthesis. But a lot of the pieces are there. I don't feel a lot of confusion around this. It's more like lack of capacity to do the thinking or actually make the move or do the work that we would be involved with it.

Yeah. And you said just a few moments ago, what's needed is for you to be yourself and to allow your strengths. To really help you,

what would that look like? I think a lot of it does come down to trust of just like if I have a feeling of what I should be doing, I need to just trust that feeling like I have, I have a pretty, like, I, I'm on the edge basically of buying a product for this. Like, I, I've been testing it, I've been playing with it.

Um. I feel like our listeners are like, Oh, you've been holding back on us. You've been like doing some things that you're not talking about, but I actually have, you know, so I've done a little bit of research to try. That's been one of the pieces that I'm trying to synthesize is, you know, I did go out, I did look at some products.

I did actually log into one and start building things in it so I could see how it functions. Um, and I think that the thing that is standing in my way is a little bit of intimidation around the time it will take to implement this. But not any kind of concern that it's the wrong direction. Oh, this is helping me to realize that I actually think, I know this is the right direction.

I'm just not sure how I'm going to find the time to do it. Mmm. But the more I have looked at this product, and especially because I know I'm so. I don't know at this point if our listeners would have heard this or not. But what are the things I do in my business coach training? This is something I'm actively developing right now.

I can link to it in the show notes, but I'm looking for a product that basically will allow me to track my clients individually, but also to do some tracking with the coach training. So, um, the thing I have found I think is a fit for both of those things. So. It's really in some ways, just like doing the thing.

I mean, like it's all the pieces feel like they're there. Like as I'm talking it out, I'm like, Oh yeah, you totally know what you're supposed to do. Like this is, and I actually pulled up like my list of what this thing needs to do and I'm like looking through it and, and I do feel like it's checking the boxes for that.

So it's, it's more of a capacity issue then, uh, not knowing which direction to go. Okay. That sounds so clear. Yeah. So you trust the product, you trust that you're, you're making the right decision once you commit to that decision. And it's a capacity piece. Yeah. Hmm. And so back to the original agenda item, which is, was looking at what am I trying to do and why is this important?

Is that still the agenda item.

It's a good question. Um,

okay. I think the, why is it important? We've kind of gotten to, I needed to talk it out, so that was helpful. What I need to do, I think is still part of that. Um, capacity issue. In terms of this, what are the steps that I need to outline, and I actually just blogged about this earlier this week, or maybe I podcasted about it, but this idea of like, sometimes you just need to make a list.

Like that's the best you can do. With like, based on what's in your brain and like, you just need to get it down onto a piece of paper so that you can work with it. And I think what may need to happen now is I need to actually outline the process and kind of say, okay, so let's say I purchase this product.

What needs to happen next? Or what are all the things that I can think of? Do kind of a brain dump of what would be involved in, um, basically implementing this product into my business?

Aye fully, fully, no. Well, that the doing part would be a piece of cake for you. That's very kind of you to say. I'm not sure that it's because you are such a process oriented person and so how do you. Give yourself permission. I'm going back to the be myself piece. Like how do you give yourself permission to be yourself and within the context of the capacity part is, is it, I'll, I'll just stop there.

So what you're kind of helping me to realize is I think the true obstacle to implementing this right now. Because I know I need to do it. I feel like I've kind of made that decision is I think there are other things on my plate that are equally large that are competing with it. In my mind, it's kind of a question of like priority for me right now of when is the right time to do this and like many things.

I'm sure some of our listeners can relate to this. I like to sometimes do projects when I can do the whole thing all at once. I don't necessarily want to spread it out. It's like if I'm going to do this, I want to take like a weekend and just do the thing and like get it done. Set up a system in a way that is going to be efficient.

Like if I'm batching tasks or something along those lines. If I'm implementing, um, or like uploading a bunch of documents, for example, to this product, I don't necessarily want to do it. An hour a day. It's like, let's just put everything in one bucket and put it all in there. You know, like, let's try to batch things if I can.

So I think that part of what I'm feeling in terms of challenge about kind of bandwidth issues or, um, capacity issues is I'm still in my own mind trying to figure out other bigger projects that are also maybe needing to be broken down or also maybe needing like a weekend to do. Where does this land?

And so far I've been able to kind of put it off, not in a procrastination way, but in a, this doesn't have to happen right now way. And there are other fires that need to be, not fires, but there are other priorities that I need to focus on. Um. And so I think one, one thing that could help me going back to a different kind of list is to write down what are the bigger projects on my plate and what is, what is actually competing with this?

Because that would allow me to look at my calendar and say, when is it reasonable that I would consider implementing this? And is it something that I want to do? For example, in the new calendar year as we record this, this is September. So I could certainly decide that this is an announcement that I make to my clients in January.

And I say, happy new year. I've got this thing for you now, and I, I'm implementing this new thing in my business. Um, or I could do it, you know, over the Thanksgiving weekends, you know, and just take that time and Thanksgiving here in the U S um, at least. So those are the kinds of strategy decisions that I could make about, you know, what is this?

But I do, I do feel the more we talk about it. This is not something that I want to rule out to like part of my client base and not all of my client base. I think it would be confusing to me to try to do it halfway or a quarter of the way versus like knowing that everybody's in the system and I'm not working in more than one system.

Now. I'm only working in one system. Everybody is the same. Everybody is experiencing, you know, X, Y, Z. um, but what it means is. Taking all my group stuff, all my individual stuff, all the coach training, stuff like everything has to be in there before I would kind of flip the switch. Yeah. Any sense?

How does it feel when you hear yourself go and identify what it is you need to do? I think it's helpful. I think it's, um, I feel more confident about the decision cause I just like internally feel like zero resistance to it. It's just like, I know it needs to happen. It's just a matter of when. Um, and I also would say the kind of strange thing about this, and, and this is something I don't think everyone listening will identify with, I do have a strange kind of sense of satisfaction of like, I want to do this.

So it's kind of like the fact that I haven't been able to do it yet. It's not necessarily because I don't want to, it's because other things have needed to be prioritized. I actually am excited to do this. I think it's actually a good thing. I'm looking forward to it. It's totally in line with the stuff I love to do.

Um, and when I started playing around with the platform that I think I'm going to go with, um, I was really enjoying it. I was enjoying setting it up. I was enjoying like playing with the features and thinking about. My clients in that space and what it could mean for them to be, you know, having kind of a one stop shop, having a place where they could easily download the audio files from our sessions cause everything's in one place.

Um, you know, having their next session right there and they know exactly when it is and they can always go in there and check if they're not sure. Um, you know, all of those kinds of things. So I think that there's definitely, Mmm. That's kind of an interesting thing for me to realize is that like the, there isn't resistance in the sense of like I'm dreading it.

I'm actually really looking forward to it. I just haven't had a chance to set aside the time to do it yet. When you speak about that, where do you feel the excitement

that reside in any particular place for you? Yeah, I mean, I would say it resides in kind of a mix between my core and my head. Because it's very much like intellectual work for me to do this, but also I feel kind of a warmth around it because it's very much about caretaking my clients. And that is always something that I'm interested in doing.

I think any kind of negativity around this process for me is the fact that I haven't done it yet, and then I want to give them a better experience then I feel like they're getting right now. I don't know that they would know the difference, you know? Like, I don't know that they would come to me and say, I don't like my experience right now because of X, Y, Z.

But I know that it can be better and I know that I can be a part of making it better. So, um, yeah. But I feel, I think very good about. This feels like the next step to really professionalize this work for myself and to give my clients a better, you know, professionalized experience.

I know you've done work around values. What values does this tap into for you? So many. Okay, so what am I values is around systems and process. So this is definitely tied in with that. And then another value I have, which is kind of an odd one, I think, but has always been one for me, is around documentation.

And I really like to document, and this, it comes out in so many ways. It comes out through podcasting. It comes out through blogging, and it comes out through my own journaling practices, but also through when I'm working with clients, things like note taking. So that they can understand and go back to what we've done.

And many of my clients will relisten. I record all of our sessions and I share that audio with them. And many people go back and listen to the session again as a kind of, it's their documentation of their own kind of growth and evolution. So, um, I would say the two biggest ones coming out of this are definitely the systems, the process, and the documentation.

So without a doubt, you sound very clear in terms of your, Mmm. Your choice, the choice around this product, and that it will allow you to address that need for trusting the system and caretaking for your clients. Is there anything more that you feel you want to explore about that? Mmm. Before moving into action?

Is there anything else that would be valuable to explore about that? The thing that kind of immediately comes to mind, and I. It's like coming from the untrusting part of myself is like, what if it doesn't work? You know, like there's definitely those questions that are still there. And also because this is a system I'm still learning, so I don't know everything about it.

Um, but also I would say. My kind of immediate internal response to that is you'll figure it out. I mean, like it, I do feel like part of the doing is like, I'm not going to know all the ways that this can function until I'm actually in there with clients. So there's a, there's a certain, and this is kind of an interesting way to think about it in phases, there's the phase in which I import the data that I have, but then at some point I have to invite my clients into this space with me.

So it's like, it's like when you are preparing your home for someone to come visit. Like, this is what this feels like to me is like I am cleaning the house. I am making it smell good with good candles. I, I'm, you know, like doing the things that you do when you're welcoming someone into your home, but then the energy they bring into your home is what makes that visit feel good.

You know? And, and so that's what this feels like to me. It's like, this is me creating the environments that I want my clients to feel. Comfortable in. I want them to feel trusting, you know, that they can kind of trust the space to do and help them with their goals and kind of what they're trying to do.

But then when they come into this space, obviously their energy is going to change what that looks and feels like, because they're going to want to do certain things within this platform, and certain clients will have certain preferences that other ones don't. Um, so that kind of level of preference and.

Their creativity around how to use it is also going to really impact it. So it's almost like I'm doing a bare bones approach. I'm putting in what I can, but then I have to kind of turn it over to them and see what comes of that. Yeah, that's very true. Okay. And that piece of that something you feel your will or want to explore at this time.

Oh, more depth. So I thought about should I bring in a couple of my current clients into this space to kind of beta test it before I go all the way? And part of me felt like that was kind of a. Um, what's the word I'm looking for? Like procrastination tactic. Like I, I know, I'm pretty sure I'm like 95% sure this is what I should be doing.

The likelihood that bringing in a beta client is gonna totally shift my mindset and, and to be kind of clarifying this for our listeners, there are many products that you can choose that will do this. There was a surprising amount. For anyone who's listening to this that is a coach, there's like five to 10 different products that are all kind of doing roughly the same thing, roughly the same price point, different user experiences, different kind of looks and feels.

And the one I've chosen, I feel pretty strongly as the best fit for me. So I think that, Mmm. When I was choosing, I was trying to kind of figure out, well, should I bring a client in here to make like 100% sure that this is something that I want to use? Um. But it's part of me is like, if it's not, then what am I going to do?

Because I don't, I don't see another solution here in kind of the field of options, and I don't want to DIY this anymore. Like that's a pretty big decision for me that I don't want to be doing this in like Google docs. So, um. I'm kind of setting that aside and it's not because I don't want the input from my clients.

It's more like, because I feel like I've set it up as an obstacle for myself, and it would take more time to do that than to just implement the system and then welcome everybody in and see what happens. Worst case scenario, I've invested in something and invested a lot of time in something that I would use for maybe a year and then decide I need to do something different.

Um, okay. Like, that's a risk I'm willing to take. I think it's just you. This is part of what experimentation is. This is part of my also set of values is around playfully experimenting and see what comes with that. Um, so yeah, that's something I considered, but I feel like at this point, and even unconsciously, I didn't really realize that I was kind of rejecting that.

Um, and deciding that I think I can just move forward.

ask it another ask, ask the question to see if you still give the same response and. So what you're trying to do, what I've heard you say is that you're trying to create an experience that your clients can trust. I that that's what you said. I'm trying to create an experience that my clients can trust, and right now we're looking at the question of beta testing a few clients, right?

When you think of it that way, or when I phrase it that way, does it change your response at all?

No. And here's why. This is a good angle. I'm really glad you're asking this a different way. I trust my design capacity and knowing the features of this software, and I don't think this is like, I want to listen to myself and be like, is this ego? I don't think it's ego. I think it's just one of the skill sets I bring to coaching is being able to design an experience that.

Is something my clients can trust that is consistent, that is a process in which like, it's not going to look different. It's not going to be hard to find things. It's not, you know, like, and part of this comes from my background in course design. That I know how to use a system like this. I trust my ability to do that.

In addition to just being a process oriented systems thinker, I have that capacity from a design perspective to know how to do that. So that to me is also a reason why. And it's not that I won't want feedback from clients or that I won't, you know, obviously listen to them if they want something different, but I'm not sure that one or two beta testers is going to give me that kind of data.

And I would almost rather have everybody in there and then say, okay, what are the trends that I'm hearing of what people want or they don't want that I would actually take action on in terms of making changes within this platform? And also, so one of the things that this kind of platform can allow you to do is to create what they call in this platform programs.

So it's basically templates that you would apply to different clients. So if I have a client who comes through my seven weeks to radical self-trust group coaching program, I would put them in this, this software, and I would give them that template. So I have to set up those programs in advance with like how many sessions they're going to have, what are the dates of those sessions, um, and what are the resources that would be tied to those sessions.

It's a way of kind of walking them through what this process is. And again, I have to trust in my capacity to know how to set up those programs. I wouldn't be relying on my clients to do that. They can react to those programs, but because of that system and how it's set up. I'm going to have multiple programs running at one time.

So even if I beta tested with one client who was doing individual coaching with me, they wouldn't be able to tell me feedback on the other programs that I'm running within this particular platform. Yeah. If that makes sense. I know it's a little abstract and especially for people who are listening, so, um, but that to me is also a helpful way of like, you know, beta testing can only go so far because I'm not going to beta test every single program with at least one person before I watch it.

Like, that just doesn't make sense to me. It's not efficient and it's overkill. Like it's just not something that's needed for me to move forward.

for that question. In terms of the beta testing. He's clear. Yeah. And . When I asked him, when I asked you the initial question that led us to talk about the data testing was whether there was anything more that we needed to address. Hmm. Before you moved into some action steps, because the agenda item was both, you know, what am I trying to do?

Why is it important like to think through that, which, uh, which she did, and then also to identify some next steps.

Is that still the agenda? I think it's still the agenda. You are raising. One more thing, but I think I need to do before I move on to actions and that is, um, I have broach this topic with my business partner who also happens to be my life partner, but I have not given him a tour of this platform. He will not really be working in it.

But I do want to show him because it's an investment that we would be making financially in the business. I want him to see what it is and see if he has any questions. He's also very security conscious and so he will ask really good questions about what are the security parameters of data that I'm storing in his platform on behalf of clients.

And so that is one more thing actually that is coming to my mind of, it's like, it's like a to do. That is something that would need to happen early in this process before I move on to actually implementing this is run it by him. Let him take a look, um, answer any questions that he might have before we actually make the purchase.

Because I do have to purchase this before I can actually start embedding the kinds of things that I want to put in there. Yeah, yeah. Okay. So at this point where.

Where do you feel you're at with with this, with the decision around finding something that your clients can trust, that you can trust, that allows you to caretake your clients in a way that feels really good to you? Where are you at with this down at this point? I actually am realizing that. Part of why.

So I'm coming up with a different why of why this is important to me. And it's because I realized that by putting a system like this into place, I will have more energy give to my clients because I won't be constantly worrying about where things are that they have access to things. You know, all of that.

That feels really good to be able to, once this is actually in place and it's running and there's a little bit of a comp, like how to get over that, that that'll be some work. Um, but that feels really good to be thinking about as kind of a motivational factor to this is I can be more attentive to my clients when I have systems and processes in place that are taking care of the basic functions of what I need to do to serve them.

Yeah. Okay. So that really is addressing that question of why is this important. There are the other pieces that you talked about, and then what you just said. Yeah, it's like a, there's always a difference between the pain points. That's kind of like making you move, you know, in a direction, but there's always a larger why.

I mean, like, I don't feel like I'm not serving my clients right now, but do I always want to serve them better? Of course I do. Yeah. Yeah. Yeah.

Is there for you or other that you associate. With that, with that last piece around for more attentive to your clients.

I think what I associate with that is,

and it's kind of, I dunno, the immediate thing that came to mind was like eye contact. You know, like I do a lot of virtual coaching. That's the majority of the coaching I do. And, but even just like on a screen, like looking at the person that they know that I am like fully 100% present in that moment.

Like I feel like that is one of the greatest gifts we give in coaching. I'm not thinking about what I'm having for dinner tonight. I'm not worried about, am I asking you the right questions. I'm like right there with you, you know, like I am trying to help you make the next right step, figure out your goals, figure out what to do.

Um, and so a big part of that is just like the eye contact piece, I think is why that came to me is because it's a stand in for this concept of like a hundred percent present, active listening, you know, that kind of thing. Um. But even just this idea of like in the moment, I'm not worried about all this other stuff.

The logistics of coaching, um, and this idea of like, it just being a distraction and it will not be a distraction.

I love that. I love that image and I wonder if that same edge that I'm, that might be useful. As you go through the activity you were talking about earlier around looking at everything, some of the other big projects that are on your plate and trying to see when it is that you might be able to, um. Look at this particular one and find time for it.

I am conscious of the time and wanted to see me, whether you, uh, we're ready to identify some next steps that you might take towards making this happen. Yeah, I think we could definitely do that. where are you feeling the energy. In terms of like where would, where do you see yourself going? Yeah, that's a good question.

Where am I feeling the energy

yeah, absolutely. I think at this point I'm definitely feeling the need to,

there's a couple of directions. Some I'm kind of thinking in my head like, which is the one I want to go to. I mean, I have data kind of sitting around that needs to go into this platform. So the energy is kind of starting to feel there of like needing to kind of collect things needed to identify are there, and I guess a big piece of this for me too is I feel like, so in the, in the middle of some of this, I've changed my process of how I schedule clients.

And that has changed how I track dates of when I've met with certain clients, how many times I've met with them, you know, those kinds of things. So I have data that's like sitting in my calendar that I need to pull out of, like who am I met with when I also have data in my Google drive of like notes from our sessions.

So I'm trying to figure out that that's kind of where the energy is feeling to me right now, is that I need to like collect those things into a place that I can start to make sense of what do I have for which client, you know, that kind of thing. Um, and I have clients that go back years, so this is not, you know.

Um, it, there may be quite a bit of information that I need to kind of track and figure out what to do with . Um, the other obvious ones that we discussed is talking with my partner. So that's, that's kind of a, an easy, you know, check, check the box on that. Um, but starting the process of gathering information, um, now that I've made the decision of what I want to do, I know what kind of information I want to include in this, um, in this platform.

It would be kind of, okay, so now I actually have to gather that. Um, and whether or not I do that, you know, I don't know that I need to like do that and have it sitting somewhere. It's not going to be easy to take, you know, dozens of client's data and like put it into like a file folder. Like that's not really my plan, but it's more of like trying to locate where all the information is so that I can then just put it directly into the platform as I'm finding it.

and so what about the other piece that you had mentioned earlier around looking at the other big projects that you have, um, what's competing, what's reasonable for you to do the chunking versus the, you know, the bits by bits. Is that also part of it? I think it is, but it was also really helpful for me to hear myself say.

That this is something I'm looking forward to and this is something I want to do. Yeah. It's almost like it doesn't really matter in terms of priority. It's more like I get to reward myself by doing this work because it's really benefiting me. It's benefiting my clients and I like it, you know? So, Mmm. I think that the.

Oftentimes the challenge of my work is that I like a lot of the things and they all compete with each other. So there really is no bad direction to go on this. But I like it all. It's just a matter of carving out time. Um, but I do think that setting some goals, so I'm doing kind of a monthly goal setting, um, process right now.

And I think this might be something that I really focus on in the month of October. You know, like when I look at that monthly goal setting and really try to break down. What does this look like? Um, and this is absolutely on my list of things that I wanted to do, like before the end of the calendar year.

I, I've had this as something to explore, um, very recently. I mean, like, this is something I've recently added to my plate as like a, a project that I need to be working on. So October is feeling like a, a potential option for what this could look like. Right. So we have, um, looked at this agenda item, Mmm. A system for your clients.

And you were really wanting to look at what problem is this solving and come up with some next, some next steps. Um, how do you feel we've done with respect to. The original agenda item and then thinking that emerged from there. Yeah. Lots of emerged from there. Um, I definitely think we hit the original agenda item.

I would also say that, um, this really helped me enter some things that were kind of unconscious about this process for me that I was. Maybe making some assumptions about it, or I had actually just made some decisions, but I hadn't realized I'd made decisions. Um, so that was really useful just to kind of understand that.

And then I would also say that one of the things I feel like kind of got unearthed in this process was what are the true obstacles and what are the things that maybe I thought were obstacles that actually weren't. Um, and that's helpful too, because oftentimes I think we just set things up and we. In our minds, it's an obstacle, but then when you actually think about it, you're like, no, that's actually not what stopping me from moving forward on this.

Um, so that was really helpful to you to identify kind of assumptions I was making around that. Mm, thank you. That's it. That's also really interesting to hear that perspective.

Well, I can do to help with accountability or a supporting over the next little while. So I think by the next time that you coach me, given our schedule, this would be, that would be a great time to check in to see like how it's going. I don't know that I need anything in between. Okay. Because there's enough of a stretch of time that I have to kind of think about how I'm going to.

Move forward on this, but, um, that let's check in and the next session and kind of see how things are going. Excellent. I look forward to it. Okay. Me too. Thank you so much. This was really fun. My pleasure. Thank you, Katie. Thanks for listening to this episode of coach to coach for any resources mentioned in the episode.

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