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choice

the magazine of professional coaching

Social Responsibility Through Coaching

How coaching is
transforming the lives
of the vulnerable

Coaching Leaders
in Nonprofits

Social Entrepreneurs &
Leadership Coaching

Helping the Helpers

departments



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How do I help clients find their legacy?

the situation

“As a corporate coach, I am quite often challenged with my clients’ conversation about social responsibility or legacy. I’m a coach who is approaching retirement and have the same question on my own mind. How do I work with my clients around this important area without adding my personal bias?”

the experts weigh in

Suzi Pomerantz, MT, MCC

Are you more challenged by the topic of social responsibility/legacy, are you more challenged by your fear of managing your own agenda or projections in the coaching relationship, or are you more challenged by your approaching retirement? Regardless, you’ve got to do your own work first before you can masterfully navigate the exploration with your clients. Assuming you have your own coach (because anyone who coaches others should walk the talk and be coached), you may wish to unpack your question in three ways with your coach:

1. How do I work with my clients in general without inserting my own agenda, biases, projections and personal challenges into their coaching?
2. What do I need to do to envision and clarify for myself what matters most to me regarding social responsibility?
3. What do I wish to create for my retirement that would fuel my soul and heal the world?

Do you know the impact you wish to make in the world? Have you done your own legacy exploration? In what ways are you leaving your mark on the planet?

I’m particularly intrigued by these questions being linked to the concept of retirement as you framed it. Do you believe that only when approaching retirement do clients need to consider legacy or social responsibility? Why wouldn’t that be part of the dialogue at any stage of professional development? What is it that you believe about your own retirement that might be getting in the way of accessing your own legacy work?

Now, if we switch gears for a moment and shift to your clients, what would it take for you to be able to check your own agenda at the door and listen to them and their legacy conversation from a place of generosity and support? What do you need to do to separate yourself and have healthy boundaries in your work with your clients? What might you learn from their conversation that would expand your ability to be of service to them in identifying their own legacy impact? How might you help them amplify the difference they wish to make regardless of retirement?



Hopefully this expands your thinking on the subject and gives you some juicy tidbits to chew on. Bottom line is that you don’t want to be the blind leading the blind, so do your own work! That will give you the reserves to be of bigger service to your clients, thus allowing them to leave a more meaningful legacy.

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Victoria Trabosh, CDC®, CEC

These kinds of conversations are a sign you're doing lasting work. It's never too early or too late to think about what our legacy will be. Social responsibility and legacy are both personal, and while you're concerned about your biases, I'd like to address the initial question first and then the bias issue second.

Social responsibility and legacy are all about wanting to live a life of success AND significance. It's important to help clients work through a process which they can continually refer to as a development tool for their stated intentions.

Here's a three-part process you can begin to walk your clients through, and modify as necessary:

1. John Maxwell says, "How you do anything is how you do everything." To get the *anything* right, I'd start with a discussion about integrity. Have them define what integrity means for them. Reflect on each area of their life, e.g., finances, family, relationships, health, community, spirituality, etc., and define and identify any integrity voids in those areas. Clean those up and they'll immediately begin to raise their game.

2. Have them list their BHAGs (Big Harry Audacious Goals). BHAGs are those incredible hopes and dreams they have for



Craig Carr, PCC, CPCC

As is often the case, there's both good news and a cautionary tale in your question. Social responsibility, legacy and retirement are topics fully loaded with coaching grist and here you sit, poised perfectly to be an expert coach in an area you know well from personal experience. You can choose this platform as a "claim to fame" and a benefit to your clients, or you can fear it because you don't yet have it figured out to perfection for yourself.

You sound like an elder coach who is aware of what it looks like when a coach's ego runs a session. It's dangerous and it's not pretty. Perhaps your question stems from your own awareness of this abyss and you don't want to fall into it. In getting to the crux of your question, let's review a few dynamics you probably know but may have forgotten.

First, most of us do this work because it challenges us, grows us, makes us look inside our own choices, and fulfills us. Among the coaches I know, if their work didn't continually awaken them to what *they* needed to look at in themselves, they'd get bored and look for the nearest exit! It's OK that you're feeling conflict. If you love the work it means to keep going, not to stop; and remember the differences between coaching, consulting, giving advice and teaching. Coaches who do all that and call it all coaching get confused and make messes they can't clean up.

Second, you are correct that you risk inserting your agenda.

their future and the impact they believe they can have in the world. Work through their doubts and fears to create action steps necessary to reach their BHAGs. They can then manifest their greatest hopes and dreams.

3. After creating action steps, agree upon a process of accountability where you to check in and monitor their progress. Work with them on roadblocks, keep them focused on their BHAGs and adjust as necessary.

Remember, what is easy does not last, and what lasts, is not easy. This is profound work, work that keeps people moving when the days are filled with good times and bad. BHAGs will always have more weight, be more challenging and have greater lasting value than small goals. Hold it all within a spacious structure that will give them direction, purpose and passion.

As for you my fellow coach, what, of all I have written, would not apply for you? You can go through the same process and your 'bias' will influence your coaching. You are not a therapist. Your clients know you have a bias - and they want to know what it is. Deliver your truth. But deliver it "charge neutral." Meaning, it's your truth that you're sharing but whether they agree or not is not a reflection of you.

That's coaching. Give them your best and help them reach for their stars and see your own as well.

When Sharing from Self, the key is to make sure you are doing it for the client.

You know this because the first dynamic is something you know about and care about. I'm going to tweak your concern a bit, though, and say it is your *unconscious* personal bias that rings the cautionary bell. The troubling and beautiful thing is that unconscious bias is alive and well in all human communication and every relationship. Your job is to manage your *conscious* biases, and that's the very best you can do.

And that brings us to the third dynamic, which is about how to manage biases. A long time ago, I learned a skill from a wise and smart mentor, which she called *Sharing from Self*. A lot of coaches don't like it when I suggest they share more of what is going on for them. They think it's forbidden territory and I assure them I never said it wasn't an advanced skill that needed to be developed. I argue that in the hands of a professional working on his or her craft, this skill deepens relationship and empowers coaching perhaps like no other.

I'm not saying there aren't landmines. When *Sharing from Self*, the key is to make sure you are doing it *for the client*. This is a bit paradoxical, but through metaphor or personal story or revealing your process, you can communicate that you know first-hand the experience they are having. This is invaluable to them on many levels but for the coaching it gains safety and range, and deepens what is possible. ●

Are you grappling with a sticky situation?

You don't have to go it alone. Let our senior coaches give you some different perspectives to consider. Email your situation to: submissions@choice-online.com and put "sticky situations" in the subject line.