Coach Cycle: Enrolling the Client

Enrolling the client is about getting the client’s permission to coach. This step is often skipped, leaving the coach to wonder what went wrong and often, to blame the client for not being cooperative. Sometimes this step is skipped because either the coach or the client assumes the coach has permission to coach and/or the coach assumes that the goals of coaching are clear. These are dangerous assumptions to make and in fact, the very work of establishing clarity between the coach and the client often acts to deepen the coaching relationship and accelerates the pace of change.

Enrollment is a stage in coaching where expected outcomes are made explicit, possible barriers and breakdowns are anticipated and addressed ahead of time, and mutual commitments are made as to what will happen when such obstacles arise. These shared agreements are important because both the coach and the client may become discouraged when difficulties are encountered. Consequently, trying to coach without enrollment is often just wishful thinking. The need for enrollment is heightened when working for equity - when the work required to achieve desired outcomes often includes unknowns and almost always involves emotionally difficult and challenging work.

There are many strategies a coach can use to enroll a client. Some are formal and some are informal. Some are written and some are verbal. In all cases, the purposes of enrollment are the same:

- Articulate the desired outcomes or goals of the coach-client relationship;
- Increase the client’s “buy in” to both the coaching relationship and the goals of the coach-client relationship;
- Increase clarity about role and responsibility of the coach and the client; and ultimately,
- Increase the likelihood of success.

Which strategies a coach chooses to use and when will depend on the context in which a coach is working, who the coach is and who the client (s) is. In addition, while a formal enrollment process can be very useful at the beginning of a coaching relationship, coaches must tend to the on-going need for enrollment and re-enrollment of the client over time.
Strategies

Ask for Explicit Permission. There are a series of prompts that effectively enroll a client and clarifies the coach’s role in a particular setting. A few include:
- Can I provide you with some coaching on this dilemma?
- What role would you like me to play in this meeting?
- Would you like me to pay attention to something in particular?
- Would you like me to intervene if...?
- Would you like for me to give you or the group feedback or make a process observation if...?
- Would you like to debrief your role as facilitator after the meeting?

Written Agreements or Contracts. Put in writing all shared goals, roles, and responsibilities and refer to these agreements at strategic times in your coaching relationship. Meetings to review written agreements can be pre-arranged, such as quarterly reviews of progress and/or set at key times when the work may be stalled or resistance encountered.

Self-Assessments. Ask a client or client group to assess where they are relative to a given standard, objective, or vision. Ask for permission to coach in the “gap” between where the client is and where they want to be. Use the assessment tool as both a reference point and a map; rubrics are particularly useful for this purpose.

Goal-Setting. Work with clients to set measurable goals. Goals can be quantitative or qualitative, but both the coach and the client must be able to say whether the goal has been achieved or not.

Visioning. Facilitate a visioning process that helps clients to articulate what success looks like in their context. This can be an individual’s vision of what it would like if they were an effective leader or teacher, a group’s vision of themselves working well together, and/or a school’s vision of itself when it is high achieving and equitable. If a vision already exists, use this vision statement as a reminder about the client’s goals and commitments.

Process Observations. Ask for permission to observe and comment on particular interactions, behaviors, or patterns that the coach or the client has identified as problematic or in need of improvement.

Cite Research. As a tool for increasing buy-in for a given goal or strategy, citing relevant research can be a powerful motivator. Different than the coach simply suggesting the strategy, citing research and examples takes the coach’s suggestion out of the realm of personal opinion and satisfies the client’s appetite for new knowledge.

Cite Other Examples. Sharing information about other leaders, teachers, and/or schools who have successfully grappled with similar dilemmas to those of the client can be reassuring and increase the client’s confidence to move forward. It can also increase a client’s faith in the coach’s knowledge on a given topic.