

# Tool: COACH-ing moments

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## What is a COACH-ing moment?

There are times during different kinds of client meetings, when a statement is made or a question is asked that naturally opens the door for further exploration. (This is why listening skills are so important!) You may decide that further exploration could benefit the client by:

- Helping them to gain clarity
- Providing additional insights
- Raising their awareness to help them to move forward.

You could approach these moments using the coaching conversation model, or introduce one or more financial coaching tools such as a budgeting worksheet or action plan. Or, you could simply engage the client in a series of **powerful questions** and **actively listen** to their responses to uncover **strengths, beliefs, resources and values**. An easy way to capture a coaching moment is to think of the **COACH Model**.

It is essentially a simpler version of the coaching conversation model that acknowledges the **Competencies** of the client, the opportunities available for them achieve an **Outcome**, the **Action** required by the client to achieve the outcome and the system of **Check** required to help the client move forward and be accountable. **COACH!**

When you encounter a coaching moment:

- What is at stake for this person if you **do not** take action to address this person's behaviour?

It may be easier to disregard a coaching moment as you may be focused on a different topic, or have limited time. However, even quick acknowledgment of the comment or powerful question can open the door for future discussion. It is important to document these moments if you do not have time to discuss further, as they can be a good starting point for future conversations.



### Competencies

- Client is capable – What are they good at?
- What's already been done, what's going on?



### Outcome

- What are the desired results?
- What options and opportunities are open to the client?



### Action

- What steps must the client take next?
- Brainstorm choices and details



### Checking

- What's the next step to move forward?
- What accountability steps does the client need?