



Sacred Depths Certification

Visioning

Joanna: Today, we're starting a new module and the module is all about visioning and strategizing. Both things are really big part of coaching and also transformational leadership and just supporting clients through transformation. So we're starting with our call today. We're really going to look at visions and the way I've titled today's class is Co-creating Magnificent Visions that Stick and Flourish. It's not just visioning, but it's about visions that stick and that flourish. And I'll explain more what I mean by that and why that's so important as we go through our call today.

But to start, I want to just talk about what a vision is. What does it mean to vision and why are visions so in general, and in the work that we do with clients? And so I'm going to start with a quote from Keith Ellis who wrote a book called *The Magic Lamp*, which is a very quick read. It's a quick short book. I read it easily 18 years ago, but it's good. It's worth taking a look at. And what Keith Ellis says is, "When people don't get what they want from life, usually it's because they don't know what they want." Let me say that again. "When people don't get what they want from life, it's usually because they don't know what they want."

And so it's a really big part of a coach's job. I really feel like any transformational practitioner's job to help clients get clear on what they really want. And there's more to this than meets the eye. Can sound simple to start, but there's actually more to this than meets the eye.

So, today we're going to look at what it means to create the vision, or co-create a vision with a client and all the pieces that are involved in it. And then in our next call, we're going to look at *The Energetics of New Things*. So we want to understand how people react and respond to when they start to create new things

in their lives because us knowing that as practitioners can really help guide them that. We're also going to be looking at Strategizing Skills. And then for the third call in this module, it's a recorded call where I kind of bring it all together. I model it for all of you and then break it down.

So, the vision and your client's vision is really at the heart of any coaching that you're going to do, what they want. And we'll talk more even what that means, what they want. It's the heart of any coaching and really any healing or transformation, as I've been saying. The way we're talking about vision today is the biggest picture. So it's literally like a vision, a big picture vision of what a client wants for herself and her life.

For example, if you're a health coach, the vision is the ultimate vision of what a client wants for her health and for her wellbeing. If you're a money coach, it's the ultimate vision of what your client wants inner and outer of what they want for their bank account, as well as how they want to feel about money and abundance. If you're a business coach, it's the ultimate vision of what your client wants for their business, inner and outer. If you're a relationship coach, the ultimate vision of what your client wants in terms of a romantic relationship.

It's a detailed profile. The vision is a detailed profile that becomes the guiding light for the client. It's a place to aspire to. It's a place to stay aligned with. It sets the stage for... A vision should set the stage for creating compelling, personal organizational or social change. I'm going to say that again. One of the ways you know that you've co-created an aligned vision with a client is if the vision sets the stage for creating a compelling, personal change, organizational change, if they're part of an organization or social change.

A lot of people in the coaching industry will say that one of the things that sets coaching apart from therapy is the focus on the future. I happen to believe that even the best therapists focus on the future as well, but that is kind of a big, like we can call delineation. Whereas, therapy oftentimes pulls us to the past. In coaching, there are times where we want to look to the past, but it's always helping us move towards a vision, helping us move towards the future. Visioning can help clients open up to future possibilities that are in alignment with their core values. We're going to talk more about that in a little bit.

And a vision shouldn't be something that is attainable right away, right? So when you're working with a client on a vision and oftentimes it'll be towards the beginning of your work together, we'll look more at that in a little bit, you don't want something that they can accomplish in a month. That's not a vision. It's

something that shouldn't be attainable right away. It's something that is doable, but aspirational, it's going to be a stretch.

When you don't have a vision and when your client doesn't have a vision, what can happen is in your work together, you'll go aimlessly from goal to goal, but without any real direction. Right? I always like to use the analogy about cross country trip with this. And when you don't have a vision, it's like... I lived in New York forever. I'm still in East Coaster so we'll talk about the East Coast of the US. When you don't have a vision, it's like, you're in New York and you say, "I want to go on a road trip and you get in your car," but you don't know where your end destination is. Maybe you vaguely know it's the West Coast, but you don't know if it's Portland or San Francisco or LA, whatever it is.

And then you don't know what road to take on that road trip like, should you take this route or should you take this route? Is it this way? It's hard to get to where... You don't really know where you're going, but if you know, "I'm starting in New York and I want to end up in LA," then you can plot out the trip where you're going to stop, which routes make sense to be scenic, which routes don't make sense to be scenic.

We want to think about this in our work with clients. If we start out in our work with clients without a vision, it's like we're just going to the West Coast, right? And we don't know what roads to take them down, how to really support them, what are the places they need to go to, to get to where they want to go? But if we start out and we know that they're going to LA, it supports so much.

As a side note, creating visions isn't only important when you're actually working with a client, once a client has said yes to you. In your enrollment conversations, you also want to support a client. It may not be the full vision, but you want to help a client pinpoint what their vision is in an enrollment conversation and in your marketing, any of your copy, any of it. When you can support a prospect to understand where they want to end up, number one, it activates them that much more to want to then say yes to working with you, but the other piece is, and this is particularly important for enrollment conversations. And you guys have that five-hour enrollment conversation workshop for whenever you're ready to listen to it.

But I just want to say in the enrollment conversation, when you can get clear with a client on what their vision is, or clear enough for that call, that's when you can in the enrollment process plot out the cross country trip and tell them, "When we work together to get you to LA, first we're going to do this, and then we're going

to do this, and then we're going to do this," and it just makes the sale that much more compelling.

When you get the vision right, with a client, you're building a strong foundation. And as I said, it's one of the first things that you want to take a look at when you're working with a client. If you've done a really good enrollment conversation, you'll already be halfway there. But when you get the foundation wrong, it's like building a house without a strong foundation. You might be able to have some forward movement in your work with your client, but it's not going to last very long.

When you don't get the vision right, a lot of misalignment happens. In other words, if you create a vision that's misaligned, it's not going to go very far, right? Either your client is going to not feel like it's not exciting or a certain point they're not going to take actions, all the things, right? Or they're going to feel like it's not realistic, whatever it is. And if clients on one level or another, even if they're excited in the moment about a vision, but if it's actually not aligned, if a client feels like it's not realistic, or it's not believable, or it's something that they don't really desire, all of that's going to lead to not getting it done, getting stuck, stymied, lack of motivation, feeling drained by trying to get there. Or for people like me getting it done, but not feeling happy or satisfied when they actually get it done.

The vision again, it's like, if you can get that right so much is going to come forward from that and flow much more [inaudible 00:13:41], and I want to say, in case you're getting scared like, "Oh, my gosh, it's everything," a vision can change also as somebody evolves, right? There are plenty of times for myself personally, when I've worked with clients where we've started with a particular vision, and it's not that we got it wrong, like it was aligned but as we start working through, the client evolves, they change, they transform so then their vision changes. Also, a vision may not be fully, fully, fully formed at once, all at once, because it's not ready to be. And that's okay as well. We don't need every single little last detail, any of that, but we want to get as close as we can.

A lot of coaches aren't aware that a big part of their job is to help clients get clear on the vision. And then what happens is there's a lot of misaligned visions, right? And I'm sure you guys have like either they're seated out there or experienced it for yourself or, whatever it is. It's like, we think that we want this job that has this, this, this, this, and that, but it's actually not what we want. Or we think we want a business that's about this, that, and the other thing, but that's not really

what we want. And part of this also, I'm always going to go back to filters because filters are so important because a lot of practitioners aren't aware that their filters may be in their way when they're helping a client articulate a vision.

For example, a lot of business coaches out there, their filter is about empire building, like that's what they think of when they think of business growth, but that may not be what your client's vision is like, what an aligned vision is. Or a relationship coach, if they haven't checked their filter, their vision may be to get married but that may not be the aligned vision for the client or losing weight for a health coach or whatever it is.

You want to actually dive deep into some real exploration to support your client to get clear on their vision. Usually the surface is not enough to get the full reveal. And the reason why I see this as truly like a sacred act for us as practitioners is because most people don't actually allow themselves to vision for real, like for real vision, what is truly aligned for them? We'll look a little bit more at that today.

They haven't been given permission and they don't, and they really spend their lives sleepwalking through what they think they should do instead of what they really truly desire. Or the other thing that can happen for people is that they over vision unrealistic things. And again, I try to never underestimate what a client can accomplish. Like I always want to see them in their highest and their best and all of that. But unfortunately, the coaching industry, the transformational industry has a little bit duped people into thinking that they can achieve a million dollar business overnight, lose 30 pounds in three weeks, find the love of your life and then they get, that's not supportive either, right? So there's either not permission given to vision or unrealistic visioning happening.

Sacred Depths practitioners we want to create a really solid container for our client to be able to have permission to vision what is deeply, deeply aligned for them, but also to have a structure to actually make it happen. Well, I'll get into that later. Okay. So let's take a moment and pause on this and let me just ask you a couple of questions so that you can gain insight for yourself. And again, like we always do here, it's like when we gain insight for ourselves, it just helps us understand our human nature when it comes to our clients.

How were you given or not given permission as a child to vision for yourself? Take a moment and jot down some thoughts on that. How were you given permission or not given permission as a child to vision for yourself?

Give you another moment with that. (silence).

Next question. What did you learn or not learn from your parents about visioning or having a vision? What did you learn or not learn from your parents about visioning or having a vision? (silence).

Next question. How often do you really allow yourself to fully vision and how seriously do you take it? And especially if you've been around the block a bunch of times, if you are a seasoned practitioner or have you just done a lot of work on yourself, I want you to really... Because we know how to vision. Those of us that have been around the block a bunch of times, we know it, we teach it, we do it, but ask yourself, do you allow yourself to fully vision? Do you take it seriously?

I even catch myself sometimes. This is just a small example, but we're renovating our kitchen right now and the first couple of months with the designs and all the things, it was like, you were doing all this stuff to the kitchen, but I was like, "Oh, I don't need a pantry." It's kind of a silly example, but hopefully it illustrates. It was like, I wasn't allowing myself to fully have what I want until finally one day a friend of mine was like, "The pantry too it's part of the kitchen. It's okay to want that also." Right?

In your own way, how often and are you allowing yourself to fully vision? How seriously do you take visioning and no matter where you fall on that spectrum, why do or don't you take it seriously?

PART 1 OF 4 ENDS [00:23:04]

Joanna: Yes. Okay. So as practitioners what do we want to do to support a client in creating this aligned vision? Well, there's a bunch of things I want you to be thinking about. So the first is to start with a vision upfront, or pretty upfront and come back to it regularly. So like I said in the beginning, you don't want to get from like New York... I'm so bad at geography, you don't want to get from New York to Cincinnati, I don't know, is that in the middle of the country? And then not be like, Oh wait, where was I going? You want to know from the beginning. So with one-on-one clients, I'm going to have an enrollment conversation so we talk about it in the enrollment conversation.

I ask about it in their welcome packet, and in the welcome packet I ask about different time periods like what would you like to have happen in the next three months, what would you like to have happen in the next 12 months, and sometimes beyond. Sometimes when I'm working with a client and it's business

coaching, and they've done a lot in their business. The first session they've got something going on and we're just going to jump right in and work on it. But if it's not in the first session, definitely by the second session, I want to take some time to really go deeper with the vision.

And again like I said earlier, to understand that visions are subject to change. And that's why checking in on the vision and being open to resetting it is important. Now there are some clients that are going to want to always reset it and that's because they have commitment issues. That's something else we can look at there later. So we want to call BS on those clients. But if we really do the inquiry and we see that it's aligned, the vision actually has changed for real and it's not a commitment issue or a resilience issue or a fear issue, we want to be open to that. It doesn't mean that you've done anything wrong as a practitioner if a client's vision shifts so long as you don't let it go on without addressing it.

And also so long as their satisfaction. And what has been done up until the point where you shifted the vision. I personally, there's a practitioners, I know that like to ask, what's your five-year vision. I personally don't like that question and I can't answer that question because I can't answer it for myself. If I don't know what I want in five years. I can take you a year out, maybe a little bit further, but anything more than that, it's in the mystery. And I find that for most people, at least that I work with, that it's not productive. Every now and again, there's someone who's like, I know I want a not-for-profit that is blah, blah, blah, further going to build that business, and then it's the not-for-profit, blah, blah, blah. All the things, and more power to them, I bow down to that, but most people, that's just a question that's going to frustrate them completely.

Know the difference between a vision and a goal. You know the difference between a vision and a goal. A vision as we've been talking about is a bigger picture. It's a little bit far off in the future. It's not going to be in a month or two months, usually not even six months, really like a year or longer. A goal is a marker on the journey to the bigger vision. So for example, if your client's vision and I'm just simplifying this, but I think you guys will get it. It's like hormonal health for them to be able to be fully hormonally healthy so that they can get pregnant, let's say that's a vision. A goal is managing their blood sugar on the road to that hormonal health. If a client's ultimate vision is a romantic relationship. And again, I'm simplifying, you want to get to more details of it.

But for now, let's say they want an incredible romantic relationship, that's a vision. A goal maybe is to get an online dating profile up and running on the road

to that relationship. If an ultimate vision is a peaceful household with happy children, a goal within that is setting limits on technology use, maybe right, depending on what's going on. But I point it out because a lot of times people jump to the goal before the knowing what the vision is. And it's like you don't have a guiding light right back to the road trip. And then the goals don't add up, they end up not having meaning or they're not really helpful.

So if you don't have a business vision, like what your vision is for your business, you don't know if you should run ads or not. That may or may not be the right strategy for you. If you don't have a vision for your career, don't just aimlessly support a client to ask for a raise that may not be that... That's a goal but the goal needs to be in alignment with the vision, you need the vision first. As an aside, it's hard to enroll a client for more than a session or two, to get them to buy from you on a goal. It's way easier to enroll a client in the sales process on a vision.

Joanna: Next principle. Know the difference between a desire and a should. You guys all know this already, but I'm going to explain it anyway. A lot of times in life, and this has already come up in the inner exploration that we've done. We set after we create visions or goals or whatever it is based on shoulds, on what we think we should be doing as opposed to what our heart deeply, deeply desires. And when we do that, when we set our life up and our visions up based on shoulds it's a bankrupt notion. We do not end up with what we want and with what feels meaningful and satisfying when our life is set up on shoulds.

By the way, if you're sitting there and you're like, Oh my gosh, my life is set up on shoulds don't be hard on yourself. Even I teach this, you may teach this too, and I'm still have shoulds in my life. This is an ongoing life journey. But as practitioners, when we work with clients, we want to try to root that out as much as possible. So should maybe I really need to lose 50 pounds, a desire maybe I want to look and feel really sexy. A should maybe might be I need to get married. A desire might be I want to be in a loving partnership. So how do you know the different?

PART 2 OF 4 ENDS [00:46:04]

Joanna: Right? So, how do you know the difference between a client's desire and a client's a should. One of my longtime students calls it our shitty list... What does she call it? Our list of shitty shoulds. One way to support a client to know the

difference is to ask why? "Why do you want this?" So, anytime a client says to me, "I want to reach seven figures," one of the very first questions I ask is, "Why?"

Sometimes another great way to support a client to get to the difference between a desire and a should is to ask, "On a scale of 1 to 10 how much does your heart desire this? How excited are you about this? What about this excites you?" As a client answers, if there's shoulds in there, either they'll start to hear it or you'll start to hear it and create awareness around it. Sometimes if a client shares a vision and I already know them pretty well, and I can hear right away, I might ask, "Whose vision is that?" Sometimes I'll get a yes or no. "Is that your father's vision or is that your vision?" Alana was speaking to this before, "Where do you feel the desire for this in your body?"

Visions, and this goes along with the difference between a desire and a should, visions are products of the heart. So it's right, a heart's desire and so any type of questioning or experience that you can create for your client that supports them to connect to their heart will help activate the desire versus the should. Even a simple question of, "What does your heart want here? If your heart could speak to you about your business, what is it that your heart wants?"

Another important principle about visions is that they include our future self. So when I'm working with a client on a vision, I'm not really thinking about... This is also, I weave it into the conversation who they are, but we also want to take into consideration who are they becoming? That makes sense?

Another good way to support a client to create a vision that's based on desire versus based on a should, is to explore their core values and their priorities. [inaudible] their core values and their priorities. So, oftentimes when we're running off a should, we're actually running off of another person's value or priority, or it may even be their parents' or society's value or priority or whatever was handed down to them that they never questioned.

When we don't define our values, our needs, our priorities for ourselves then our lives are misaligned from our heart. [inaudible] actually true for us. And then our lives instead become based on other people's or our society's values. And that's when sleepwalking comes in. That's when we just start to sleepwalk through our lives. And that's when overwhelm comes in too, because it's usually overwhelming or it creates resistance to go after something that's not your core value, that's not a value of yours, it's not a priority of yours.

You can ask this even in a welcome packet, as a welcome packet question that I also really listen for this. We looked at this in our listening skills and I have conversations with my clients, what are their core values? Is integrity important to your client? Is money? Maybe money is a value, right? Is money important? Is clarity? Kindness? Freedom? I have some clients where paradigms smashing is like a big core value.

When you can support a client to know what their values are... And then you want to track that, right? You want to be aware of that too, because then it can help you really guide a client in general, but when you're visioning... So like when I have a client and I know that money isn't a top value, like that freedom is way higher value for this particular client than money and we're visioning out their plan for the next year and it's sacrificing some freedom for money, I'm going to call that out.

But I have other clients that value money above freedom and a plan like that is great for them. Right? So the values, the priorities, the needs are so important. This is an important point. I just want to make sure this makes sense to you guys.

Joanna: I'd say across the board, like all of my clients myself included want both but sometimes it's like... I guess my point was like, if they want to put together a plan where they're doing a launch every six weeks and then they don't have any time freedom around it, of course we want to look for solutions where they can still earn the same amount of money with working less. But let's say it's like, there isn't one, right? In order to bring in that many clients, then I'm not going to just let them do it without first having a conversation with them about what it means and for them to be okay with what they're prioritizing. That they're prioritizing the money over the freedom. Does that make sense?

Yeah. Okay. All right.

I have some questions for you guys, but I just want to make a note to give it to you for homework, because we don't have time right now. I want to keep on going.

So next principle for visioning. I already spoke to this a little bit. Give permission for real visioning to happen. We already looked at why, right? Because people sometimes have trouble visioning. Oh, also give permission, this came up already a little bit, for your clients to break rules and expectations. If you're going to give a client permission to really vision, inherent in that is to give permission to break rules and expectations.

Here's some questions that can help with that. These first two are from The Magic Lamp. That book I mentioned earlier. What would I really want to accomplish in life if I were absolutely positively certain I would do it? And then a variation on that, which I also love is what would I really want from life if I were absolutely positively certain I would get it? So, that speaks to that disappointment question that Katie was bringing up before. Here's another question that can help give permission. What would you do that's totally different from what you're doing right now if you were absolutely certain that it was okay? What would you do that's totally different from what you're doing right now if you knew that it was okay, no matter what?

Sometimes the permission piece, you can ask questions and then sometimes you're to want to like flat out reflect a truth around it. Right? And depending on the client and the situation, you may be softer or you may be more bold, but you know, you may say, "I sense you're not giving yourself full permission to really be in your heart's desire right now." And then open up a conversation around that. And that may veer first into looking at patterning. We're not going to get to that on this call, but like looking at their patterning. But even some of the questions I asked earlier can help them get into that pattern. "What did you learn from your parents about giving permission?" All of that.

Sometimes the question I may ask that gives permission is a yes or no. And it's, "Are you willing to give yourself permission here?" Or maybe it always depends on the situation, but a variation on that is, "I love the vision that you're creating. Are you willing to give yourself even more permission to go after what you want? What would that look like?" Right?

Alana's asking if I recommend doing some of these questions in the welcome packet. No, I would do it in the session because there are so many resistances and things... I do ask about like I said earlier, I think I called them goals in the welcome packet. Actually, maybe I called it vision. I need to go back and look, but what's your three month goal? What's your six month? Your 12 month? Something like that. It does need its own session or half session. I really recommend that because again, you're getting off... It's like how you're starting, you're getting off to a solid start and then so much more can flow from there.

Next thing to take into consideration is to be as thorough as you can be. Take lots of different pieces into consideration when you're co-creating the vision as much... Like I said earlier, sometimes we don't know the full vision, but as much as your client can uncover at that point. So I'll give you an example from

business, but you can apply this to any area. When I'm co-creating a vision or supporting a client to really articulate their vision and their business, of course, we're going to look at money. That's part and parcel, but we're going to look at their time. We're going to look at their health. We're going to look at their satisfaction. We're going to look at if their interests are being integrated into the vision, we're going to look at their desired level of effort, right? Or how quickly they get stressed out about things. We're going to look at the impact that they want to make through their business, right?

The more details you can get to, the more fuller vision you're going to have, the better than you're going to be able to strategize and support them through, to create the vision.

Any questions on that?

Gloria is asking, do I have an exercise for that? I've heard of The Wheel of Life. I mean, I think I've seen the image. I do have a values... I don't know if I included it the last couple cycles. I have a values questionnaire that I'll share with you guys that's great for a client to do on their own. But the truth is I like to do this in conversation with a client. Again, because there's so many nooks and crannies and places to go. So I don't have a particular exercise, but we each know our area of expertise in a sense, right? So like the things that you generally help your clients with, and you kind of know... You can start to make a mental note on what are all the areas within that bigger vision and start to ask about those. I think that's more helpful than Wheel of Life personally. But if anybody has had really good experience with Wheel of Life please put it into the chat because by no means it's not truth with a capital T.

All right, make it a stretch. Support your client to make the vision stretch. If it's not a stretch, it's not going to be exciting. It's not going to be worth their time really, or yours. And a stretch can mean different things for different people, right? It doesn't have to be like the grandest thing. For someone that has a deep, deep, deep, deep, deep fear of being vulnerable, putting themselves on an online dating site is going to be a stretch, right? So, but so make it a stretch for them. And my philosophy is that it should be doable with the stretch. So I'm never going to push, I'm never going to push anyway. I lovingly nudge, but I'm not ever going to push a client to create a vision that's more than what is possible for them.

A lot of times when practitioners do that, it's their own ego is involved, but it's not actually what's best for the client. Years ago, when I first started coaching, I

read one of Cheryl Richardson's books. I'm having trouble remember what it's called. I think it's called Make... I'll find out. But anyway, I love this. She has this thing, she talks about stretch, risk or die. And basically what she says is you want to support clients to... there's three zones. There's the stretch zone, which is like, "This feels uncomfortable. I'm stretching here to do this thing." Like, "I don't normally do video but I'm going to do a video presentation," right? So that's one zone.

The second zone is risk. Like, it feels really risky. It's more than a stretch, right? It feels risky to do this. "I'm going to do video for the first time with 300 people and do an exercise that I've never done before." And then the zone beyond that is die. "I would rather die than have to do that thing." When you're working with clients, whether it's a vision or a goal within the vision, you want to stay in the stretch or the risk zone. The, "I'd rather die," every now and again, a client will just be able to like bust through and do the die but usually it's too much, it's going to end up in overwhelm or stress or they're just not going to end up doing it.

So, stretch or risk, really healthy areas of growth. Usually, "I'd rather die than do that," not such a healthy area of growth. So, take a moment and think for yourself, like in general for you when you vision or go after things, where do you fall in? Yeah, I guess there's something before stretch, which is just to stay comfortable. Right? So where do you fall into, comfort, stretch, risk or die most of the time?

Nicole's asking, "How do you gauge what's doable for the client or do they make that determination?" It's such a good question. The client always ultimately knows best ultimately, ultimately, but I am using some of my consulting expertise to guide them in it. But again, I'm checking my filters and also letting them know that I trust their inner wisdom.

For example, if someone doesn't have a business at all and they say they want 10 clients in four weeks, I'm not going to say like, "That's not doable." This might be an extraordinary person that has like a really strong network that we're going to dig into seeing and whatever. But if I see like they still have their job, they're still working their job and they have some fears to overcome and they don't have clarity yet on what exactly they're doing, I may say like, "10 is an awesome goal. Let's put that..." You never want to make them feel bad. "So let's put that as like the high end. But I think it would be a win if there was one client, but even a month, I think it's too soon to get your first client." So that's not even the best, but you know what I'm saying? Like, I'll give them a range than...

Or I may know that a client tends to push themselves too hard and 10 is doable if they push, push, push, but they've been miserable because of their pushing, I'm going to point that out for them. Does that answer your question, Nicole? Let me know. Okay.

Alana is asking, "Sometimes what is just a stretch or risk feels like death." Yeah. "So what do you do then?" You want to create awareness around that and we'll get to that, like in befriend your fear, that's one of the concepts we're going to look at because sometimes something that is a stretch or a risk, the little one inside of us feels like they could die so there are things to do that, but it's just pointing it out, just creating that awareness sometimes is enough.

What's one place where you could, I'm asking you guys to answer this for yourself, where you could stretch or risk could just a little bit more than you are right now? Or if you tend to the, I'd rather die place, where is a place where you can maybe put yourself in that zone a little less if that's not working for you?

If I see that a client is really staying in their comfort zone, I may go to some of the permission questions-

PART 3 OF 4 ENDS [01:09:04]

Joanna: I may go to some of the permission questions, but I may ask some stretchy questions, like "If you added one outrageous element to this that would get you so excited, what would it be?" Or something as simple as "What would it look like if you stretched a little bit more?" And if I know there's a particular place where they need to stretch, let's say we've been talking about their visibility, their fear of visibility. "What would it look like if you stretched in terms of visibility here, just a little bit more?"

Another really important element to an aligned vision is that your client and you need to believe in it. I mean, if you don't believe in a vision that you've set out for, it is very hard to make that vision happen. As an aside, even in the sales call, when you're activating vision, you want to be working to support a client to believe in the vision or else they're not going to buy from you because they don't believe that their money is going to be worth it. So how do you support a client in believing in the vision? So number one, energy follows energy. It's important for you as a practitioner to believe in your client and to believe in their vision. If your client is creating a vision and in your head, you're like, "Nah, this isn't going to work," it's going to be very hard to support that client effectively.

Joanna: So when we do that litmus test in enrollment conversations, you know you're starting with someone that you can believe in. And then when you deepen that vision in the beginning of the work together you want to make sure that you... That doesn't mean that I need to know all the ways, exactly how we're going to get there at the outset. There's always a leap of faith, no matter what. But I have to like feel in my heart that I really believe. So that's one piece. The other thing that's really important to support a client and believing in their vision is to go back to acknowledgements and looking at their resources.

So questions like "What inner resources do you have that will help you achieve that?" So that they can see they've got the inner resources, they've got the fortitude, or the wisdom, or whatever it is, whatever the answer to make this happen. "What are the outer resources that you have that will help you achieve this? What have you already created that gives you evidence that you can do this? Even if it's a stretch or a risk, what is it that you've already done, or you've already created, or you've already experienced that lets you know you can do this? Who are you ready to be in order to create that?" All of those types of questions support a client to believe in themselves to be able to step into the vision.

Another thing, another kind of ingredient that's usually necessary for an aligned vision is for the client to be excited about it. You have to believe in it and believe that they can achieve it, but they have to be excited about it too. And again, we start with energy follows energy. You as the practitioner, if you want your client to be excited, you have to be excited. Show your excitement. And then from there, you want to build mental, emotional, spiritual excitement. "What will be possible when you achieve this vision? What's going to be possible for you when you blah, blah, blah?" Whatever the vision is. "How will you feel when you achieve this? Where in your body do you feel excited about this?"

And we'll get to visualizations later in the program. You can even then lead them through a visualization to really concretize, similar to what Allana was saying before, make that body memory of that excitement. It's important for the vision. It's important for the strategy. It's important for the persistence and consistency as they work to get there. Are these questions appropriate for an enrollment conversation? Yeah. 100%. You can ask these in an enrollment conversation.

Joanna: We spoke about seasons. We'll speak more about seasons as we go forward, but I just want to insert knowing what season your client is in into this call too, because if you're starting to work with a client and she's just been

through a big push period, or burned out by something, or has just had a great loss, whatever it is, she may not yet be ready to really lean into her vision. Because she's in winter. It's like she needs either to grieve or she needs to rest, whatever it is. And so for a client like that, you're not going to start with the big vision. It may first just be the short term to support her, to move through her winter, whatever that's going to be, to be able to start to vision.

So for example, I have a client who when I started working with her, she wanted to build her business, but she had been through a very, very long and exhausting illness and divorce. And so we held the business vision. We started to create it a little bit and we held it, and we didn't make some movement towards it, but it was really with the understanding that the first couple months of our work were about her healing from what she had just been through. So you want to just really be aware of that when you're working with clients. And I'm sure we could all name a time in our own lives where we've tried to push to start something, but we weren't in the season to start it. It was the wrong moment. Sometimes clients can't see that for themselves. They want the glory, the big vision. And to be a practitioner in integrity, part of our work is to actually support them to see what season they're in.

As we've been saying kind of throughout the call today, be willing to reflect the truth. If a vision is too small, be willing to reflect that. If a vision sounds as if it's based on a fear or expectation of the client, be willing to reflect that. If a vision doesn't sound aligned or it feels like too much too soon, be willing to reflect that. Always putting the client in the driver's seat, honoring their truth above what you're seeing. A vision won't always drop in all at once in one session. Give it space. You may start a conversation and then give more homework to go further with ideas.

Sometimes a client can get really too serious about visioning and it just blocks their creativity and their heart's desire completely. So you want to think about energy and playing with energy. When a client gets too serious about it, I'm going to bring playfulness in. I'm going to ask a question that's going to help them to play. Or even just have them get up and do some jumping jacks. I may say like, "Your adult self is very involved right now. Let's bring your kid into this." So we want to kind of just watch for those pieces as well.

Let's see if there's anything else I wanted to share. I think that's it for today. Next week, we'll get into more of what blocks people from visioning and then strategizing. So we have a couple minutes left too, which is great. So let's pause

here and take a moment and write down what is it that you're seeing taking from the call today? So first, just what are you seeing and taking? And I'd love to hear, I'll give you your homework in a few minutes. I'd love to hear some takeaways. I feel like there's some questions. And Allana asked a question. "If you're starting with them in their winter, what do you do in an initial visioning session?"

So part of that visioning session, you may have already established this in the enrollment conversation, but if you didn't, part of that first session is just going to be to create awareness around where they're at. And then what's the shorter term goal, like creating space for grief, or helping them set up their schedule so that they can rest, and rejuvenate, and set boundaries? Always with the understanding of like, "We're going to get through this point. And then when we get there, you'll have much more resource to see what it is that you really want."

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