

Ep #138: Pivoting in Your Coaching Business



Full Episode Transcript

With Your Host

Lindsay Dotzlaf

Ep #138: Pivoting in Your Coaching Business

Hey, this is Lindsay Dotzlaf and you are listening to *Mastering Coaching Skills* episode 138.

To really compete in the coaching industry, you have to be great at coaching. That's why every week, I will be answering your questions, sharing my stories, and offering tips and advice so you can be the best at what you do. Let's get to work.

Hey, coach. I am so happy you're here today, as usual. And I want to walk you through something I recently – We're just going to dive right in. Hello, welcome, I hope you're ready.

I recently made a decision about something and made kind of a pivot in my business. And I just want to share with you how I made the decision because it was kind of a tough decision for me. And I have an offer that is the Advanced Certification in Coaching Mastery.

And inside there I kind of tell them, one of the things that they have access to is a little more behind the scenes of my business and kind of how I make decisions, how I work with my clients and all of that. And so I had kind of made this big pivot in my business and what felt like a big decision for me. And I had told them that I'm going to post this in the group so you can see how I made the decision.

And as I was typing it all out, I thought, actually, it feels a little vulnerable, but wouldn't it be fun if I talk about this on my podcast so you can see kind of in real-time how I use, first the decision-making process that I teach. And also how I use the lens of values that I create or that I come up with for myself and for my business, how I use those as a lens also to help make decisions or to solidify decisions or to check in with like, is this how I want things to be going?

So that's what we're going to do today. The first thing I'll do is just tell you the change I decided to make and then I'll kind of rewind and walk you through the whole decision process.

Ep #138: Pivoting in Your Coaching Business

So as I just mentioned, I have an advanced coaching certification. And I had launched it, it was supposed to – I'm finishing up a round of it right now. While I'm recording this we have about two months left, and it's a six-month certification. And when those two months are over, actually a little before because they were going to overlap, I was supposed to start the next round.

And I had sold this, I don't even know when maybe a couple of months ago. And I had a handful of people enroll when I did that launch. And my goal was to have about 20 to 25 students or clients in the certification. And obviously, a handful is very different than 20 to 25.

So that's not a problem, I have done relaunches before and they've been very successful. That didn't feel like, oh no, it's this huge thing. I mean, I was, of course, a little disappointed, but no problem. Let's decide when we're going to relaunch it and just do that. So we kind of did that, we made a plan.

And then after we made the whole plan, some weird things started happening and things just started falling apart and unraveling a little bit, especially when it came to the live event. So the certification I have a few-day live event portion that goes with it and is one of my favorite pieces of the certification. And I had picked a hotel. I had picked a location.

And the location I picked, which I knew this but I think I just kind of forgot when I was planning it, is that the live location is in a college town. A mountain town that happens to have a college. And I knew it, but I just forgot. But what I didn't realize, it's also kind of a small town. It's Boulder, Colorado. It's outside of Denver if you're familiar with it. I love it there. But it doesn't have a lot of hotel, Airbnb accommodation options.

So what I found out was, even though they didn't tell me this when I booked it, which that's fine, this is on me, I should have done my research. It was move-in weekend for the college or move-in week or whatever. Okay, so I was like, okay, what does that mean? So then the hotel had convinced me I didn't need to reserve rooms, but now the rooms are filling up. And then it

Ep #138: Pivoting in Your Coaching Business

was like, oh, now we have a conflict with the place where I was going to kind of host this cocktail party or reception, like a welcome reception for the beginning.

It was just a whole thing. And things just kept happening. This was not the hotel's fault. I think it was my fault mostly, or our fault. And I was just so excited about the location that I just didn't spend enough time researching it.

And for any of you that have ever planned a live event, maybe you know it takes a lot of work. It's always more work than I plan it to be, than I expect it to be. Even with my business manager and my team, people that are helping me, it just still is always a bigger thing than I think it's going to be. But it's worth it because it's one of my favorite pieces, right? So that starts happening.

Then something comes up, a personal like family conflict comes up. Something that is really big for one of my kids, she was so excited. And I was like, oh, I'm going to miss it. So that kind of hit my heart, right? So I was already a little stressed. So I have to relaunch. Now I have to figure out this live event. Now there's this personal conflict.

So all of it together just was the weirdest, and some other little things sprinkled in there. Like individually, they were all fine. And added up together as it just kept kind of piling on, it was like okay, and this is part of what I teach, which is like, yes, you can change thoughts about things. Yes, you can change how you're thinking, how you're feeling and get on board with certain things.

But sometimes, when life keeps presenting you obstacles, maybe there's a time to take a step back and say, okay, hold on. Let me really examine this. How much effort do I want to put into coaching myself or getting coached around this, versus just making changes so it works better for everyone?

Okay, so that's kind of the background, the setup. So at this point, I have a handful of people enrolled. I have already paid the deposit for the live event. But all of it's planned and the relaunch is also planned. And I just

Ep #138: Pivoting in Your Coaching Business

kept hesitating. I just was kind of frozen. And so I dug into that a little bit. And I was like, why? Why am I frozen? What is coming up for me? What's the thing? Why do I not feel excited to just relaunch this, get some more people in here and make it happen?

And what I realized is that with all of those things, if we had to possibly find a different location for the live events. Which I also think is confusing for my clients and effort on their part, or change the date for the live event, right? That was going to be a lot of effort.

And the other thing that was kind of happening is I am currently, as I said, in my first round of hosting, or the first round of the certification. And I have started implementing some things in that space that are so fun and amazing and it's just taking me a little more time and effort, because I choose for it to, than I had expected.

And this is usually true, especially when you have a new offer. The first time you run it, or maybe even the first few times you run it, it might be in order to deliver the client experience that you want to have, it might just be more effort than you expect it to be in the beginning.

This is not a problem, right? This is part of what we do, part of what I teach at least is to deliver amazing client experiences. So, of course this isn't a problem. And I also could see one of the things that I'm doing in that space is I'm giving them kind of the template for an entire client handbook that they will go in and answer some questions and fill in all the things for themselves.

And then at the end of the six months, as part of their certification, we are going to mail them a copy of their own client handbook, which is how they work with their clients, everything about their processes, everything about onboarding, off boarding, from basically A to Z, with some spaces for journaling and quotes. And it's so fun.

And that piece has just become more work than I expected. Again, not a problem. I'm not removing it. We are having a blast with it. But one thing I wanted to do, one thing I noticed is that they were feeling a little

Ep #138: Pivoting in Your Coaching Business

overwhelmed and I really wanted to open up some office hours to support them. Just a few extra like here's some office hour calls, you can come and we can just talk specifically about working through the pages of this handbook if you want to.

So that was all on the table, right? So then I started thinking about, okay, and I have this next round coming up. And kind of feeling like I didn't have all the information yet a little bit. I wanted to evaluate the current round, but it's not complete yet. And it really, at this point, does kind of feel like a big deal to me to really do a great evaluation to collect feedback at the end of the round before I implement the next round.

Okay, so that's kind of all the backstory. So what I kind of came to was, okay, here are my choices. I can go ahead and run the next round just with the handful of people who have already enrolled. I can relaunch and then run the round, right? But I already knew because of all the things that were coming up and work that I wanted to do in the round that was currently going, it felt like a lot on my plate to figure out the live event, to do the relaunch and overdeliver for the clients currently working with me.

So that one kind of went off the table. I just decided if I'm going to keep the same date, I'm not going to relaunch. I'm just going to run it with the people already enrolled. And then the next two options were I'd postpone it basically a couple months. So I would relaunch, you know, give it a couple of months, redo the live event and relaunch then and decide at that point what to do with the people who had already enrolled.

And then the last option was I actually make this only once a year thing for now and I don't launch it again till fall. And then run it just kind of in the same timeframe that this current round is running. So like February to August-ish.

So when I looked at these options, okay, I knew I didn't want to relaunch and just run it. So that's off the table. I also, and this was just honestly a business decision, I didn't feel like I could run it with a handful of people already enrolled because, and this is why I say it's a business decision,

Ep #138: Pivoting in Your Coaching Business

because with something like this with a live event, the hotel that I would owe money to and all of those things, there's a certain cost that comes with putting on a live event. And then, of course, just the running of the mastermind and all of that.

And I didn't want to run it and lose money, which is basically what would have happened. Now, could I have made this decision? Yes, it just didn't feel in that moment that it was the right decision for me because of all of the other kinds of things that were already coming up around it, right?

If it was just like, nope, I feel fully prepared, it's not going to affect any of my other client delivery and I'm just going to run it. I definitely could have made that work with the money loss or not, right? But at this point, it just felt like this is not the right decision.

So then it came down to the last two, right? I'm either going to postpone it a couple months, relaunch and run it that way. Which would be like out of the plan that I had set kind of for the year, the timeline plan. Or I'm going to postpone it altogether and not run it until, you know, sell it in the fall, run it at the beginning of the year.

This felt like such a hard decision and I really sat with it for a while. And this is one of the main reasons I wanted to share this with you because I know some of you have this stuff come up in your business. Where it's like, I feel like I want to make this decision or I feel like I need to make this pivot. And I don't know how and I can't decide what is the best. I can see the options and I just don't know how to make the decision.

So here I'm just going to tell you how I made it. First of all, I have a decision making process that I teach in The Coach Lab. So of course I'm like, okay, well, let's start there. And the way I teach that, it's in one of my very first podcast episodes, but the brief rundown is – And I'm actually adding, because I did this for myself I'm adding another step to the decision making process. So I'll tell you that today too.

But basically, the rundown is to take the two decisions, right? So postpone a couple of months or don't run it for another six months. List all the

Ep #138: Pivoting in Your Coaching Business

reasons that you would do each of them. So I spent a good, I would say, hour really getting clear, writing out all the reasons. I'm not going to read you all of the reasons, I'm just going to give you kind of the highlights or the ones that stood out to me because you'll be able to see very clearly why I made the decision I did.

So when I thought about just postponing, like postponing a couple months, pushing back the live event, seeing if we could reschedule with the same hotel. Also, that way we wouldn't lose our deposit, and just kind of making it happen, right?

It still felt like this might be a little tight, but I can do it because I'm going to have to relaunch or just launch altogether and plan the live event again and all the things. All the things I would have had to do that I'd already done launching it, I'm now going to have to do it all over again. The question is, am I going to do it in just a couple of months or am I going to give myself six months?

So here are the reasons that I thought I would want to do it quicker, right? Just postpone it a couple months. One, and this one is hard for me to say out loud and it was a really eye opening thing to see when I wrote it down. I didn't believe that I could sustain my business without selling this higher priced offer for the year.

And I don't necessarily mean just hit my goal, that's a separate one, hit the business goal that I set for the year. But I mean actually sustain my business. Like paying for everything that I need to pay for in my business without it affecting where money is going in my business. That's very different than just setting goals and hitting them.

The second one, which felt pretty heavy to me, I really didn't want to disappoint my clients. The ones that had enrolled, that were excited, that I would see them posting and talking about it in certain spots. And it was just like, I really didn't want to disappoint them. That felt very heavy to me.

I didn't want to not hit my business goal for the year though. That one didn't feel so heavy. I always recommend when you do this exercise that you

Ep #138: Pivoting in Your Coaching Business

literally just list everything that comes up. But that one was like yeah, okay, I might not, but is that okay? And my answer was yes.

A couple of other ones were, mostly all of them as I was reading through they were mostly just fear-based, right? There was a lot of like, I want to deliver. I said I was going to do this so I want to deliver it the way I said I was going to. I made this commitment, you know, things like that.

But most of them were very like, I don't want to disappoint anyone and I don't believe that I can sustain my business, which is so ridiculous. When I look at proof or even look at what I did last year and where the money came from. It's just really interesting how sometimes our brains just really love to lie to us.

Okay, so there's that list. So then the next option, and again, there were more but those were the main ones that really stood out. I'm going to add one more actually on that one, which was I didn't want to lose money. Because if I canceled altogether because they told me I could use the space if we could find a date and the next couple of months after.

I forget exactly what they said, but if we can find a new date, then that's fine, my deposit would transfer. And if not, I would have to pay X amount of money. Okay, I didn't want to lose the deposit. That was one reason.

And when I go to the other option, which is to take the full six months before relaunching, before running it again, listen to how different these things are. I think it'll be very obvious for you, especially because you're just listening to me. You're not in the feeling of it, right? Which is so different when you're the one doing this exercise.

But the top ones, the ones that really stood out to me where it gives me space and time to wrap up and completely overdeliver with my current clients in both of my offers, in all of my offers, not just in the certification. But specifically in the certification to really just take my time, wrap up with them and just do a complete evaluation and gather feedback afterwards.

Ep #138: Pivoting in Your Coaching Business

It'll give me more time to plan and to implement for the next live event and for the next certification launch so that when I'm talking about it, when I'm selling it, it's very clear. Clients won't be confused, they'll know the exact plan, the exact dates, all of that, which to me creates a lot of safety and just trust in a coach when they're not flip-flopping all over the place.

The next one was I won't have to cut into non-business hours. So one thing as I was looking at my schedule is I had other things when I was thinking about having to relaunch and having to plan a whole launch in the next couple of months. One thing I was thinking about is, okay, what are the other things that are on my schedule for this month, these months that I'm going to do this? And am I willing to not do those things? Or can I do both?

So when I looked at the schedule, one thing that I'm working on right now that I'm currently working on that I thought it would affect is I'm currently creating new videos and new content for The Coach Lab. And I knew it would cut into the time that I'm spending doing that if I had to plan a whole nother launch and plan the live event.

So I wasn't really willing to do that. So then I knew, okay, so I'll be doing both at the same time. What that might mean is overworking, right? In my opinion, overworking. Just working lots of hours outside of the normal hours that I work, which would cut into just time with my family or time that I rest or time that I spend doing things that aren't running my business.

And then the last one was, which I briefly touched on this a second ago, which is to really spend time collecting feedback and evaluations from the current clients in the current round and really making sure that they feel so taken care of and delivered on what they signed up for. And also that they have input in what does the next round look like, right? Not necessarily like I'm asking them to plan the next round for me, but just that their feedback matters, which is really important to me.

So all of those things, when I look at the two next to each other, it feels pretty clear, right? It was like I love the reasons why I would wait six

Ep #138: Pivoting in Your Coaching Business

months. Why I would just say like, okay, I'm not launching this again till fall. I loved all of those reasons.

But if I'm honest, not wanting to disappoint my clients or the clients that had already enrolled or not wanting to disappoint, even the clients that are kind of, I don't know how to say this, but like watching, right?

I know I have clients who are just kind of watching what I do and the decisions I make and they're so excited for the certification. Even if they're not enrolled right now they're like, "I can't wait to do it in the future." And they love watching me run it and talk about it and all of that. So there's just a lot of general disappointment. I don't want to disappoint all the people. So that felt really heavy.

So then the next thing I did, even though the decision felt pretty obvious, the thing I did which I am now going to add this to my decision making process in the way I teach it in The Coach Lab. And it's something that I tell my clients to do and for whatever reason it just didn't wasn't so obvious to me in the moment.

But I looked at my desk and I remembered that I always have, usually have a post it note with my values. And this is something I teach in the certification because when I pick business values, one of the main things that I use them for is kind of like a lens of is what I'm doing, or the decisions I'm making, the way I'm running everything, does this match up with my values? And every once in a while there's something that's like, oh, this feels a little unaligned and it's very obvious and easy to fix.

But when I saw this list, it kind of made me laugh because I was like, of course. This is exactly why I teach my clients to use this as a lens and use their values as a way to help them make decisions because it feels so, so clear.

And the three that stood out to me, I have five total. But the three that stood out when I was looking at it, one, simplicity. This is the value in my business. I teach it in my containers. And simplicity just on all levels, like ultimate impact with simplicity as simple as possible. And what I knew for

Ep #138: Pivoting in Your Coaching Business

sure is that nothing about quickly turning around a relaunch and replanning a live event screamed simplicity. Nothing. Right? So there was that. That was glaringly obvious.

The second one is impact. And the way I describe impact personally as my value is not just like, oh, I want to make an impact on the industry or the world or whatever. But really, impact is always important and we are always, all of us as coaches are always making an impact. And it's important to consider what that impact is, right? Because sometimes like we usually think of impact as like, oh, this is a good thing, I'm making an impact.

But impact can be negative as well, right? We can make a good impact, bad impact, whatever. And one thing I was thinking about is the impact that I have just on my clients and on this podcast and people who are watching what I'm doing and following what I'm doing. I didn't want people, particularly my clients, to see me hustle into this or overwork and wear myself out and feel exhausted by taking on too many things at once just to hit a goal. To me, that was like, okay, that doesn't actually make sense.

One thing I talk about sometimes inside my programs is to me the way I set goals and the way I think about things, especially when it comes to business, is that money is one way to set a goal. But to me, it's not always the most motivating and it's never the most important. It is a measurement. And it's a really good measurement sometimes, but it's not the only one that's important.

And so if I'm only choosing that but then forgetting about all the other ways that I measure kind of is it going well, which is you know, am I healthy? Am I spending time with my family? Am I taking care of my clients? Is my delivery amazing? Am I taking care of my employees? All of that feels equally as important.

And when I looked at all the reasons it was like, okay, the impact here, yes, it might impact the money coming in, the money that the business is

Ep #138: Pivoting in Your Coaching Business

bringing in. But look at all of these other things, like in a positive way, but what if it impacts some of these other things in a negative way.

And then the last one, as far as one of my values, which this one is very obvious because it's literally what I teach, which is excellence, particularly in this case in client delivery. And I define excellence as not perfection, but just doing the best we can with what we have and really leaning into how do I create the most excellent, the most amazing experience for my clients?

This is what really sealed the deal, right? Because it was like, okay, if I think about it, not only does this have the potential to affect my current clients because either I'm going to drop the ball on some things or I'm going to overwork and just not have a fresh brain to coach them or to show up for them. One of those two things is going to happen, right?

And not only that, but it could also affect the experience of my future clients, of the clients who had signed up for the next round of the certification, of the clients who had already committed but now I am going to have to make a lot of last minute changes and I'm going to have to spend some time doing things and some things might fall through the cracks.

And that, I just knew that was like, okay, boom, decision made. Here's what we're doing. So I think I said this at the beginning, but now I don't even remember, the decision I made was to postpone it.

So there will be six months in between. I don't know if that will continue. Some of you email me sometimes to ask when the next time I'm launching is, so I'm just telling you now around November, I believe, is when we plan to launch the next round of certification. And it'll start at the beginning of 2024.

And don't hold me to it. We haven't actually picked exact dates, so that could always change but that is what the plan is right now. And not only have we postponed it, but the second I made the decision, I just knew this is exactly the decision that I was meant to make. I had so much relief and

Ep #138: Pivoting in Your Coaching Business

all the fear about my clients being disappointed, all of that literally melted away because I just knew this is what we have to do.

And I will tell you, for those of you that are like, oh, but what did you do or how did you handle that because you're curious about it for your own situations, what I will say is I sent all of them an email. I kind of told them, here's the plan, this is what's happening.

And then I gave them choices. One, to get a full refund, no questions asked. Two, to enroll instead in the Coaching Master's Intensive if they wanted to do that. If they knew for sure they wanted to join down the road, but they wanted something to work on right now, that's an option. And then three, for me to keep their deposit and whatever payment they had made and apply it if they knew for sure they wanted to join in November.

So they all replied back. Everyone was so gracious, which I'm so grateful for. If you're listening, if you're one of those people and you're listening, I'm so grateful for you. And then the last thing I did is I did offer, because one concern I had is that if any of them had already booked travel that was for whatever reason non refundable, I didn't want them to be stuck with that because this is my decision, not on them.

So I also made an offer like, hey, send me any receipts or any whatever you have and I will, if there are no other options or no other way out of it or to get a refund, I will refund your money. Now, luckily for me, that wasn't a thing. But I was willing to do it because I knew, okay, I'm the one that made these decisions. This was not them, right? Like, this was 100% on me and I'm going to own it. I'm going to be a full grown adult business and own like, hey, this is the pivot, I'm taking it all on. I don't want this to be any hardship on you.

I hope that that was really helpful to just kind of see my train of thought. And what I want you to take away from this isn't, "Oh, this is how I should be thinking about things," because it's not. My actual thoughts don't really matter.

Ep #138: Pivoting in Your Coaching Business

What's more important is just seeing like, oh, here's the process you can use to make this type of decision. And just really noticing, like allowing yourself to feel all the feels when you feel like you have to make big decisions or make changes in your business that you weren't planning to make or when things don't go the way you thought they were going to go and you have to figure out what to do.

Hopefully, this was helpful. Thank you so much for listening and I'll see you next week. Goodbye.

Thanks for listening to this episode of *Mastering Coaching Skills*. If you want to learn more about my work, come visit me at lindsaydotzlafoaching.com. That's Lindsay with an A, D-O-T-Z-L-A-F.com. See you next week.