

Ep #149: 4 Rules for Being Friends with Clients



Full Episode Transcript

With Your Host

Lindsay Dotzlaf

Ep #149: 4 Rules for Being Friends with Clients

Hey, this is Lindsay Dotzlafl and you are listening to *Mastering Coaching Skills*, episode 149.

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. So I am going to just dive right into today's topic because if you have been listening to the podcast, you know the next episode that's coming up, episode 150, will be a Q&A episode. And you all have been submitting questions for the Q&A, some amazing questions that I will mostly dive into next week.

But something came up that was interesting and I started thinking about it. First of all, I collect the questions that you're asking in Typeform, so I logged into my Typeform account and I pulled up the type form where you've been asking questions. And one thing I noticed, I used the same type form that I've used for all the episodes. So all the questions are there and I just was looking at the dates to collect the questions that are just for this episode.

And one thing I noticed is that there is a question from someone, Amber, I apologize. She submitted some questions in January, which she must have listened to an older episode, found the link and submitted some questions, which you are always welcome to do, by the way. I considered this when I saw it, I thought maybe I'll just do that regularly. Just open it up where people can submit questions at any time so that sometimes I can answer them throughout the year or if I feel like there are trends, that I can even get some episode ideas.

So, she asked a question, and it just triggered a thought for me that is like, oh, this is so interesting. This topic is probably one, I would say like in the top five of things that people ask me. Clients ask me about this, I coach on it every once in a while, in The Coach Lab it tends to come up. I have

Ep #149: 4 Rules for Being Friends with Clients

coached on it in my other containers. And every Q&A episode I've done I think I've gotten some form of this question.

And so I'm just going to cover it in an entire episode. So this episode is going to be about coaching and friends. So kind of I'm going to cover it from three different angles. So, first of all, can you coach your friends? Second, can you become friends with your clients? And third, is it okay to be friends with your coach? What happens if you become friends with your coach?

And Amber asked some very specific questions, so the way I'm going to do this is I was really thinking about how this shows up for me, how it shows up in my coaching and how I handle it. And so I came up with kind of my rules about this as far as, because my answer to can you coach friends or can you become friends with your clients, the shortest answer is yes. And I think that there are some boundaries that need to be set if you're in that situation.

So I'm just going to go through my rules and then I'm going to go through and answer also some of Amber's very specific questions, which I think are great questions. So when I think about the rules I'm going to give you, I think you can use these in any of those situations.

So if you become friends with your client, if you are coaching someone who you are already friends with or that you know, like prior to coaching you're already friends with them, and they want you to coach them, or if you become friends with your coach. Although I do think that one, there are a couple of things to consider that might be a little different.

So first, let's dive in, here are my four rules for coaching your friends or becoming friends with your clients. Rule number one, and I don't know if rule is the right word, maybe it's like a boundary or just something to consider.

So, number one, when clients ask me this, is it okay to be friends with my clients, and I've coached on this a few times in The Coach Lab, this is the thing that always comes up. One thing I ask is, would you be friends with

Ep #149: 4 Rules for Being Friends with Clients

that person if you weren't their coach? Or, because sometimes it's also a prospective client, right? Like, can I be friends with someone who's a prospective client?

So my answer to that is, of course, only if you would be friends with them outside of that relationship, right? And inside The Coach Lab I get very curious about it. Like tell me more. Why do you want to be friends? Would you be friends with them otherwise? Why does it feel confusing for you? Where's the line or lack of boundaries happening in the situation?

And I think it's a really important question to consider. Is this a person that you would actually be friends with in your real life? Because otherwise, I would be curious about the kind of motives for it, right? So when I've coached on this before, it's come up a little bit where maybe there's some sort of like, well, I feel like they want to be friends, so I should be friends with them. And if I'm really honest, maybe that's going to affect if they re-sign with me or if they sign up to coach with me in general or any of those things, right?

Be really honest with yourself, if any of those things are true, like if any of those are the reasons that you would be doing it, then I would probably say no. And maybe I should have prefaced this before I even started going into these four things, but I do think that coaching can be so personal, especially when you're working with one on one clients.

I remember when I worked with one on one clients and I was a general life coach and they were bringing me everything, right? I was coaching them on their relationships. I was coaching them on family dynamics and family relationships. I was coaching them on their jobs, or careers or businesses. I was coaching them on really everything, right?

And I think that you can become very close with a person because sometimes your clients are telling you things that they've maybe never said to anyone else and it can feel very personal.

For that reason, I think we can become close to someone because of that. And I also think that is the reason that you have to be very careful, just very

Ep #149: 4 Rules for Being Friends with Clients

clear in your mind why you would want to be friends with them, kind of what's going on behind that motivation. Okay, so that's the first one, only be friends with them if you would in real life.

When I think back to, especially most of the one on one clients that I work with, there are some I worked with years ago that I still talk to, right? I think that I became close with most of my clients just because they were typically working with me for long periods of time and, like I said, we were diving into some really personal things. But I didn't necessarily become friends with all of them, right?

I think sometimes there are just certain personalities that it's like, oh my gosh, I want to be friends with this person, right? It's like a match, versus we can have an amazing coach/client relationship and kind of when it's over, it's over. But I do still talk to a lot of my past clients.

And one thing, maybe a caveat or side note to this first rule or boundary is would you still be friends with them after the coaching relationship is over? Because if the answer to that is no, then, again, I would just question it. Like, why are you thinking that you should be friends with them?

The second one is to have a clear division of friend time and coach time. So one question that was asked in what was submitted is how do you separate normal, friendly calls and coaching calls, including other forms of communication, such as text and emails?

This is a great question because I think this is probably one of the most important things about choosing to be friends with clients or choosing to take on clients that you're already friends with, is that there just has to be this clear boundary. So the way I would answer that question, how do you separate the two, you just separate them completely, right?

So if it's a coaching call, we're coaching, that's it. If it's not a coaching call and it's like, hey, let's chat as friends, then it is just something different, just like you would with any other friend, right? I think sometimes a part of this is on most coaches' part there's a part that's just overthinking it, right? Because it could get blurry, but really it doesn't have to be blurry if you're

Ep #149: 4 Rules for Being Friends with Clients

just very clear about it. This is a coaching session, I'm coaching you. This is a friend call or Zoom or whatever, let's be very clear.

And the same is true for any other communication, right? So upholding any other rules that you might have with your clients. If you become friends with a client upholding any other rules and boundaries that you might have with them.

So, for example, if you don't coach over text with other clients, or if you don't coach over email, or you don't communicate with your clients in that way, then you wouldn't also communicate with this person who's your friend in that way as a coach.

So, obviously, if you don't text with your clients, but you have a good friend who's now your client, you wouldn't tell them, I don't think, okay, now we just don't text. That's not a thing. But probably what you wouldn't do is maybe coach them over text if that's not something you do regularly with clients, right?

Now, I think this can get a little blurry because I do have colleagues that I've become really good friends with and every once in a while we will text like, hey help, and there might be some very brief coaching or just a few questions asked, like coaching type questions, asked over text. But to me that's different, that's like talking to just a friend who I also know as a coach that I'm asking or they're asking like, hey, can you help, versus someone who is paying to be my client.

So that's that, right? Like really having a clear division, this is friend time, this is coaching time. And by that, also thinking about you as the coach, can you keep that division in your mind when you're in a coaching session? If you can't, then maybe you can't coach your friends. Or you can't really be friends with your clients if you can't keep that kind of neutral coach space, right?

If your friend wants coaching, and I have coached several of my best friends from the past, I have coached them. Some of you have even heard me talk about it. Sherry Strzelecki was my best friend in college, now

Ep #149: 4 Rules for Being Friends with Clients

occasionally she is my client and she also coaches for me sometimes in The Coach Lab, but we still keep those two things very separate.

So I'll give you an example, this is not something she ever brought for coaching, but let's say she did. I know her from college. I also know her husband. And one thing, so if she had ever come to a coaching session and said, hey, can you coach me on my marriage? I would have had to be sure, which, again, let's be clear, she did not.

But if she did, I would have had to be very clear to separate out the person I know as her husband versus what she wants coaching on to make sure that any of my thoughts about him didn't cloud what she would want coaching on.

Or if she's like, this thing happened and whatever, and if my thought is like, oh my gosh, I can't imagine that happening, or I can't imagine him acting like that or whatever, where I wouldn't normally have that context with other clients, it's just really important for yourself as the coach to really separate that, right? To really say like, okay, this is a lens that I'm not going to wear when I'm coaching my clients when I have other outside information.

Especially when I don't know if my information is true, right? If we were to use this example it would be like, okay, I have an idea of who he is, of how I've interacted with him, of any kind of friend relationship that I've had with him, but that doesn't mean that I know everything about him, that I know anything about how they interact together on the day to day, right? All of those things are still, I want to hear from her if I'm coaching on it.

Okay, the next boundary I would set, so if the lines are blurred at all and they come to you outside of a coaching session or maybe even inside a coaching session when there's a lot of emotion, maybe emotion is high, one you can ask is just do you want a friend or do you want coaching?

Now, for me, this question mostly comes up when that example I gave you of chatting with a colleague, right? Someone who's not my client, but who is a coach and who has become a really good friend. It can be very easy to

Ep #149: 4 Rules for Being Friends with Clients

just hop right into coaching, especially when the other person is a coach, right? Like, oh, obviously, they know what coaching is, they love coaching.

But in this moment, they may not have signed up for coaching, they may just be talking to you as a friend. So I think it's really important to ask, are you wanting a friend right now or do you want coaching? And most coaches should know the difference, they should know what that means.

To me, a friend is like, I'm going to commiserate with you. I'm going to have so much empathy. I'm going to not question anything you're telling me. I'm going to comfort you. I'm going to just be on your side no matter what, and in agreement with you on your side.

As a coach, the difference between responding as a friend and responding as a coach is as a coach I'm going to maybe ask more questions. I'm going to be more curious. I'm going to ask you maybe like what is the outcome that you want from this? How do you think what you're feeling about this right now and what you're thinking about this right now, how is it affecting the results you're creating?

I'm still going to be on their side as a coach, but it's going to look different, right? It's going to be like I'm on their side to help them create the results they want, but I'm not necessarily going to believe every single thing they tell me.

I always believe my clients, I believe that whatever they tell me is the truth for them, but I won't take it as the truth of the universe, right? I might ask questions about it, like that's the coaching piece, right? Instead of just saying like, you are totally right, that person is terrible. The blah blah, blah. That would be like a friend response, right? Versus, okay, if someone wants coaching on it, I'm going to ask questions instead of just agreeing.

Okay, the next thing is, so this would be specifically if you've become friends with someone. Or you have been friends with someone and you see them often outside of coaching or you chat often outside of coaching. When you're inside the coaching container, one thing you would do is maybe you

Ep #149: 4 Rules for Being Friends with Clients

would only coach on things that come up outside of the container with permission.

Now, I think consent and asking permission to coach is always important, but especially in this situation, right? So let's say, I'm just going to make up an example. Let's say you become friends with one of your clients, you go to their kid's birthday party. And at the birthday party you notice that maybe their relationship with their mom is strained, right? You notice there's some tension there, some weirdness, maybe they are talking to each other in ways that aren't kind. Whatever you notice, right?

You notice that, but you're just there as a friend. And then now you're in a coaching session with them. And you then notice they're describing something to you and maybe it has nothing to do with their mom, but what they're describing is very similar to what you witnessed. I think it's really important to then ask permission to bring that into the coaching container, right?

Okay, it's really interesting that you're bringing this up. I would love to coach you on it. I also kind of noticed something when I was at your daughter's birthday party that this kind of came up then too. I noticed it in your interactions with your mom. Can I bring that up in this coaching session? Do you think those are similar things? Do you want to coach on them both at the same time? Is this like a relationship in general thing, right?

Just asking that permission and honoring whatever their answer is, right? And their answer might be, no, I don't want to talk about that at all. Okay, fine. Let it go, coach them on what they want coaching on.

Okay, so those are my four main boundaries, but then I want to address some of the other questions that the person that submitted this, that she asked and kind of add onto them a little bit.

So one question she asked was, if you become friends with your coach, and they confide in you and want you to coach them on something they're

Ep #149: 4 Rules for Being Friends with Clients

going through, doesn't that affect the coaching dynamic? My short answer to that is it depends. And here are my thoughts about this.

So if you are working with a coach and you become close with that coach, or maybe even you hire someone that is your friend that is a coach, right? Like you're already friends with them, and now you're hiring them as a coach. And then that coach comes to you and says like, hey, could you coach me on this? I think you just get to be completely honest.

Normally my answer for that would be yes, but I've actually had times when, you know, I'm friends with coaches that I've worked with. I've had a couple of times where someone has come to me and said, okay, I just am feeling really stuck on this thing, can you help me? Could you ask me some questions? Could you coach me? Not like a full coaching session, right, but just maybe like a text or a voice message or whatever.

And if my thought is, oh, I have lots of opinions about this or lots of opinions about how you should handle it or anything along those lines, I'm just going to be really honest. And I think you'll see that the theme of this is like, let's just be open and honest about all of it. I think it'll take care of all the issues.

But I'm just going to be really honest and say, actually, I don't think I'm a great person to coach you on that, right? Maybe get coaching from someone else or ask someone else or ask your coach. I just can't coach with a clear mind on that topic, or I feel too close to it, or I have too many opinions, I don't think that it would be useful.

I think you can just be really open and honest. And if you think that it will affect the coaching dynamic, or if it's something that you're like, oh, I don't like that my coach would ever ask me to coach them, again, just be honest, right?

Actually, I just prefer because you're my coach, and I know we're friends, but because you're my coach it just feels really weird to me to coach you on anything, or I feel self conscious about it, or I feel however you feel. I would rather just not do that. I know you work with other coaches, let them coach you on it. That should never be a problem, right?

Ep #149: 4 Rules for Being Friends with Clients

And if you have a coach that does make that a problem, then I would just question that. That would be strange, I think. As a coach, I think that most people would receive that very well.

I rarely ask my clients for any coaching. Every once in a while someone will offer something, especially now in my mastermind group I work with so many incredible coaches who are experts at what they do. And if they know something's coming up in my life or maybe with my health or something along those lines, this actually just happened the other day, they might offer, hey, if you ever want to chat about this, I'm totally open.

I even had recently, just yesterday, one of my clients said this about some health things I had going on. And she even said, it was in our Facebook group and she said, I don't actually think I would be the right person to coach you on it, but I'm happy to chat about it or help you figure it out or point you in the right direction.

I think that that is a perfect way to say something like that because it's totally – She also asked ahead of time, are you open to this? And I said, yes. So then she came back with like, I don't think I would be the right person, but I'm happy to chat with you about it. I've just wondered if you've considered XYZ?

I think that that's a really powerful thing, right? She asked for consent. I said, yes. She even said, I don't know that I would be the person, but I'm happy to chat with you. She totally put it in my court. And I think that that is a really good example that you could always use in the situation.

The next question is, do you participate, so if you become friends with your clients, do you participate in their social activities? I think if you go back to the rules or the boundaries that I think about when I think about being friends with my clients, it might help answer this. But my thing would be if you can separate them, if you're like, okay, here's our friend relationship and then also once a week for an hour or whatever that is, I am their coach, then, of course. Why wouldn't you?

Ep #149: 4 Rules for Being Friends with Clients

And you also just want to be sure that you're showing up in those situations as a friend, not as a coach. Now, I think this line can get a little blurry on occasion. I'll give you an example. Let's say you're a business coach and you have a client that lives kind of close to you and they maybe are hosting for their business. They're hosting some kind of gathering or get together or event or something like that and you want to go and support them.

To me that's a little different. That's like you are going as their coach, to support them, to be there for them, to show up kind of in a coach role. And also, because it's outside of the coaching norm, outside of the coaching relationship, you might not show up with like, let me coach you through all of this, right? You have to make it clear in your mind, I'm just there to support them.

I'll give you another example. I was recently invited to a wedding of a past client. I couldn't go, which made me so sad. And the travel just wasn't going to work out. But we're not necessarily super close, great friends, talk every day outside of coaching. She's no longer my client. But when I worked with her, something that we worked on or that she talked to me about sometimes was some relationships in our life. And she had kind of some big events happen while we worked together and she was like, it would feel really special for you to be there.

It would have felt really special for me too, right? I would have been going, of course, as her past coach, but I never would have shown up with any type of coaching support, right? I would have just been there to cheer her on, to support her in this situation. And I don't think that's weird at all.

So, if you're having any weirdness around this, I would just question why. For me, the only reason that it would probably be weird is if, one, you're blurring the lines between someone you would really be friends with and then thinking, oh, they invited me to this event.

I maybe wouldn't necessarily be friends with this person, but I feel like I should go because I'm their coach. Or maybe if I do go and support them in these social activities, then they're going to re-sign with me or just anything

Ep #149: 4 Rules for Being Friends with Clients

like that. You just really want to be on to yourself. Be very honest, not only with the other people, but also be honest with yourself.

In a group setting, so this is the next question she asked. In a group setting, is it a problem if I have more personal friendships with certain clients? Could that give an impression of unfair treatment or access to you as a coach?

So, again, I'm going to come back to it depends, and openness and honesty in these situations are always amazing. So I'll give you some very specific examples in my life. I am very good friends with a few of my current clients. I have clients that have been in The Coach Lab, but also that have been in my mastermind and in my certification, and we've just become really close. But our friendship is different.

So when you say, does that give the impression of unfair treatment, they mostly aren't getting any unfair treatment, right? They're just getting my friendship. It's not like I'm giving them extra coaching every single day or doing things for them that I wouldn't do for anyone else.

Of course, every once in a while something might sneak in that's like, oh, this thing is coming up in their life. And, of course, as a coach I might be able to offer different support than I would be able to just as a friend. But I would never coach them on something that I coach them on inside my containers outside of the container, if that makes sense.

So I'm coaching my clients on, let's say in my certification I'm coaching my clients on creating their iconic work, right? Like creating their innovative work in the coaching industry, their intellectual property. And I'm really good friends with someone there, and maybe they bring a relationship question to me as a friend.

That, on occasion, if I feel like offering it, I could offer, do you want some coaching on this? But that's very different than me offering coaching on what we're actually working on in the group outside of the container.

Ep #149: 4 Rules for Being Friends with Clients

The other time it might come up, and I have spent a lot of time thinking about this, is at in-person events. So in the couple that I have hosted that are connected to my mastermind or to my certification, I have an in-person live event. I love it so much. And the past few times I've done it, I've reserved an Airbnb.

And it's not an Airbnb that's big enough to hold everyone, it's just big enough to host everyone during the day, right? So everybody else stays somewhere else and then my clients are there by, let's say, 9am, whatever. I don't remember the schedule. But let's say everybody shows up at 9am, but they stay somewhere else.

In the past, I have asked one or two clients to stay with me, but probably not for the reasons you would think, right? Not because they get special treatment. Not because, I don't know, not because there's anything extra happening outside of that coaching.

But because, if I'm honest, I get scared of staying at Airbnbs by myself, especially when I'm reserving them in different cities. And I'm getting, usually, a house that's big enough to hold maybe 20 people. And I tend to pick pretty modern houses, those are my favorite. And they always have lots of windows.

And I do not love being in giant houses with lots of windows in a city I'm not used to by myself. That is just the truth. So, again, when it comes to open and honest communication, the last time I did that, I just addressed it immediately. I said, just so you know, they're not getting any special treatment. If anything, I'm just going to my room, being by myself after the event because I really need the quiet time and to wind down and to prepare for the next day.

If anything, I get more worried about them missing out, right? So this is also something that you may not have even considered. The person that asked this question, you may not have considered this. But this was actually a conversation I had the last time I did this.

Ep #149: 4 Rules for Being Friends with Clients

I had this conversation and I said, a lot of the other people in the space are either getting hotel rooms, like all at the same place, there were a handful of them that were getting an Airbnb together. And I said, I don't want you to miss out on that experience, right?

Because, to me, that is also an important piece, finding colleagues that you love, finding community that you love, creating that for yourself. Just because I've asked someone like, hey, can you stay at this house with me because I'm a little wimp and I'm scared and I don't want to do it. Can you stay here with me? I don't want them to miss out.

So I actually think about it very opposite than you do, right? I don't think, and maybe this has to do with as a coach, I never think about putting myself on a pedestal. My thought is never, oh, it's probably better for someone to be in a house with me hanging out with me, than in this other house creating community, finding these colleagues that they love, creating different relationships, right?

I'm never like, oh, being in my house is such a privilege. That's just not how I think about it at all. If anything, they get roped into like, hey, can you help me with this? Or I'm running behind, can you set all the journals out and make them look pretty? You're ready, right? That's something that has happened.

And I think when you are growing a business and maybe you don't, like in the future my thought is I would bring someone with me. I would travel with someone who's there who I'm paying, who's there specifically to help me with some of those things, right? To help me feel safe in big houses.

If I were to do it that way again I would bring someone with me so I feel safe in the big house and also who's specifically there to help me set out journals, get out snacks and breakfast things or lunch things or whatever it is that we're doing.

So hopefully that feels useful. I've considered doing this episode in the past. And I've just thought like, nobody wants to hear this. But what's so funny is this, again, probably in the top five questions I get all the time

Ep #149: 4 Rules for Being Friends with Clients

about coaching friends, being friends with clients, being friends with your coaches, all of those things.

So hopefully this all made sense. If you have any questions, find me on Instagram, come ask me the questions, but otherwise, hopefully you have something to take away and I will see you next week answering all the questions, all the Q&A's.

And, Amber, again, thank you so much for submitting these questions, they were amazing. They were very specific, which I loved. And hopefully you got your answers. And I'm sorry, it took a few extra months. All right, I'll be back next week with all the rest of the Q&A, I'll see you then. 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.