

Ep #240: How to Conduct an Energy Audit to Transform Your Coaching Business



Full Episode Transcript

With Your Host

Lindsay Dotzlaf

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Hey, this is Lindsay Dotzlaf and you are listening to *Mastering Coaching Skills* episode 240.

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 are here today. But before we get started, before I dive into today's episode, which I'm really excited about, I want to tell you something. If you're listening to this episode in real time, and it is Tuesday morning and this episode has just come out, and you are listening to it, I rarely say this, but you might need to pause the episode, head to the link in the show notes or find me on Instagram @lindsaydotzlaf.

And I want you, if this sounds like it fits for you, I want you to register for a workshop that I'm delivering today, as the day that this releases. It's called Beyond Fine: How to Know When Your Business Needs Strategic Evolution. I am super excited for this workshop.

If you are a coach who sometimes has a nagging feeling that maybe some things need to change in your business or you want some things to change, but you're just not quite sure if you should trust it, right? If you're like, am I being reactive or proactive? I'm not quite sure. Or, if your business, in general, everything's running fine, but something just feels a little off, you should come join this workshop.

If you—and this is specifically for coaches who are kind of past that just initial, 'OMG, how do I sign a client?' phase, right? That just learning to sign a client, but that are more, a little more successful, a little more in—we all have bumps. We all have ups and downs. But just in general, you feel pretty confident about running your business. Maybe you're running a group program, or you have consistent revenue, or you have consistent, kind of fully booked—whatever that means for you—one-on-one clients, then this workshop is for you, and you should join us. It is happening today.

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And even if you're like, 'Lindsay, I have a client at that time,' or 'I have a meeting,' or 'I have whatever.' No worries, you will get a recording, but you have to register in order to get it. Alright? So that is happening today, if this—if you're listening in real time, like the day it comes out—at noon. Noon to 1:30.

So it's a 90-minute workshop where we're actually going to be—I'm going to help you identify all of the things that I just said, right? Help you know when is it time to take action on those nagging feelings. When is it time to strategically evolve your business and really help you dig in and get some clarity around that? And I cannot wait. So, join us if you caught this in time. If not, and you're listening in the future, I'm sorry you missed it. Maybe I'll do it again. Okay.

So, now that that's out of the way, that is not what the episode is about today. What I want to talk about today is something I'm calling—and I mean, okay, I said I'm calling; I did not make this up—but I want to talk about how to do an energy audit. And something I've realized recently is this is something I do with myself pretty consistently, and I don't just use this for my business; I use it also in my life.

You are welcome to do the same, and you're welcome to use this, as always, with your clients. It does not matter what kind of coach you are. You can use this, what I'm about to teach you, and use it with any type of client, anything that they're working on, if you feel like it makes sense. And you can even edit it to make it a little more your own or to make it fit a little more for whatever your specific clients are working on.

So, one thing that I think is so important to know about running your business, right? You've probably heard me talking a lot about—well, and for your coaching—coaching and your business. You've heard me talking a lot about really finding—when I was talking about business pods a few months

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ago, right?—really finding the way that is more natural for you to build your business.

And then, over the last couple of episodes, I've been talking about the Reimagine Mastermind, where what I do in there is kind of the same thing, just on a next level, right? For more advanced business owners.

And one thing, one tool that I realized I use that I am really putting together in a more tangible way now because I'm going to start teaching it in these spaces, is an energy audit.

And what I think is so important about auditing your energy is that you can really start to learn where it's important to put more of your energy, where it's important to maybe not focus so much of your energy, or what things to kind of save for later in the day if you know they're going to kind of drain your energy. Or, kind of what are the first things you might hire out, like hire someone to come in and do in your business because they're things that you don't love to do.

And we're also going to talk about it when it comes to your clients: working with your clients, working with different types of clients, and how that can affect your coaching, your coaching spaces, and just your overall business and happiness running your business.

So, you've probably heard of some idea like this before, but I'm actually going to go through step-by-step, tell you all the places you might look if you want to do this exercise, and tell you exactly how to do it. Exactly how I do it. And reminder, I like to keep things super simple. So you can make this a lot more complicated if you want to, if there's a good reason for you to do that. But what I'm going to teach you is just a very basic way to audit your energy.

And again, you can use this anywhere. I recently did this when I was traveling because I love to travel, and I love to make the act of traveling as efficient and easy as possible. And so, not once I'm to a place really, but more the packing, the getting ready, the going to the airport—like those

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parts of the travel. And so I recently did this, and it was super, super helpful.

So, what you'll do, here's how you do an energy audit, right? You can pick out any parts of your day, any parts of your week. You could do your entire workday, every day for a week, or at least cover enough days where you are getting in all the different types of tasks you might be doing in your business, including coaching. Or you can do this just within—you can kind of zoom in or zoom out.

You could do it for your whole day and just take an overall audit of your days. Or you can zoom in and just audit maybe your coaching sessions, or your group calls, or your behind-the-scenes activities. Right? Like there's no right or wrong. And what you're kind of looking for is with each task that you do, how do you feel?

Do you look forward to it? Do you dread it? Do you feel energized by it after the fact? Do you feel exhausted by it? Do you, Monday morning, wake up and think, 'Ugh, on Thursday I have to do this thing in my business that I don't love to do?' Do you—it's just really pointing out all the ways, all the places that your energy is going and giving you a kind of a snapshot of which ones should you be putting more effort into because they fuel you, and which ones maybe should you be putting less effort into because they drain you.

And here's what will come from knowing this. It doesn't mean that everything that you find that is, that kind of drains your energy or that isn't your favorite thing to do—it doesn't mean you can just cut all of those things out. Sometimes you can, right? Sometimes if they're unnecessary, you could cut them out. Sometimes there might be ways to shift them, to change them. These are some of the things we work on inside Reimagine, right? This is what we've been kind of talking about.

And sometimes you might change it altogether, make big changes, right? Like, okay, I know that I need to do this XYZ task. This way that I'm doing it

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now really drains me. Is there maybe a completely different way? And I think sometimes, especially for the more, for the kind of successful business owner—whatever that means. I always hesitate to say the word 'successful' because it's like, what's the measure for that exactly, right?

There's no like, 'Oh, that's me.' There's no specific identifier that would make you say, 'Oh, that's me.' For the business owner that is past those beginning phases of just having to figure everything out, there might be some goodness in here that allows you to really make some big shifts that completely change the way you feel about your business, about your coaching.

So I'll give you some examples. Actually, no. First, I'm going to tell you what the process looks like, and then I'll talk about all the different ways you can use it. It feels a little backwards, but I think it'll be easier for you to have a mental idea or picture of what the steps look like so that when I go through and talk about all the different ones, then we can talk about how you might apply them there. So, here's how I do it. Again, I love to keep things very simple. So I'm going to pick whatever the thing is that I'm auditing my energy for.

And then I'm going to—I'll just use one example. Let's just say I'm going to audit my workdays, just everything in my workdays. And so not, not like my morning routine, not in the evenings after I work, but just every task that I'm doing within my workday, whatever that looks like. And I'm going to do that all week, or at least as many days as, again, captures all of the activities that I would be doing within my business. Right? And then, so, let's say on Monday—let's just say I work on Monday, I work from 10 to 5. So, with each task I do, I'm going to make a list of it.

I'm going to pull up my note section or grab out—I usually use my notes on my computer, but for this, I might actually use, often I just use a journal. I use a notepad that I have sitting out on my desk just to make it as easy as possible. And I'll just go through. So if I come to my desk at 10 and, maybe, let's say for an hour I'm catching up on emails. I'm just going to write

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'catching up on emails.' And then give it a rating. And then I move on to the next thing, right? Let's say I have a client call for the next hour. So I write that down.

And then I have, let's say, maybe I take a break for lunch. I don't need to audit that, really. And then I—unless I'm working through lunch, and then I will do that. And then I'm going to, maybe after lunch, then I have a meeting with my business manager, and then I have an hour of writing emails for an upcoming launch. You get the point, right? Whatever the things are, though, it's totally made up. That doesn't even sound like how my schedule would usually look, but let's just say that's what it looked like. So, I'm just going to take a note, just a real quick note about what I'm doing. And then after I finish that task, I'm going to give each thing a rating.

And again, simplicity, I just choose one of three numbers: a 1, 2, or 3. Right? One is not good. That's like, it feels blah, it feels kind of like a sludge to get through the activity, and just in general, they're the things that I don't look forward to in my business or in my coaching, in whatever it is I'm auditing. So that's a 1. The next option is a 2, which 2s are just pretty normal. I can just get through them pretty easily, but they don't really light me up, but they also don't drain me. They're just kind of—this for me might be like checking emails.

I don't really mind checking emails. Some people hate it. I don't really mind it. I mean, maybe it depends on what's going on in my emails. But on a normal day, if I'm spending 30 minutes checking emails and responding to them, that just feels neutral to me. Right? It definitely doesn't light me up unless there's something exciting in there, but it also doesn't—it's not something I dread. So that would be a 2.

The next rating would be a 3. Obviously, this is on the good end, right? This is like I look forward to it. It lights me up, it energizes me, and just in general, I feel good about it. I don't have much resistance, and I just get to work, do the thing, and then move on and feel great. Now, as you're doing this, you want to be sure that you are writing down enough detail that it

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makes sense when you look back over it later. Right? So if, let's say I have a meeting, I'm not just going to write 'meeting'; I'm going to write who the meeting's with and a general 'what are we talking about.'

And if I'm coaching clients, I'm going to write down, coaching session for an hour, and I'm also going to write down who I'm coaching. Because we're not just going to measure it because these could vary, right? So we're not just measuring how do I feel about a coaching session?

If I have, let's say, 10 coaching sessions throughout my week, I might feel differently about them. I might rate them differently depending on who the client is, what we're coaching on, how much I enjoy working with that client. And let's be clear, even if I have a client that I give a low rating, it's not because it's, 'Oh, I don't like that person,' right? It's just like there's something about that client that just isn't my favorite when it comes to the coaching. And that's going to be really important data.

Also, let's say maybe one of the things on your list is a group coaching session or multiple group coaching sessions, you might give that one overall rating. You might also break it up, right? You might, depending on how you run your group and kind of what's happening during the time that you're coaching, you might break it up or just add some notes after of if there's anything that happens during the session that really drains you or brings your energy down, brings the group energy down, or that you just aren't quite sure how to handle.

Maybe you rate that one way, or if there's something really fun that happens, maybe you make a note of those things, right? Because we're just looking for what are all the things throughout the day that kind of keep your vibe high versus drain you, right? What are all the things that you look forward to, that you love doing? Because the more you can take note of them, the more you can reimagine or build a coaching business that feels that way more often.

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And you can start to solve for the things that don't feel great. And I do feel like right now is the time I should say that there is a difference between—especially if you're doing this if you're a brand new coach, right? And you're doing this, and you get really nervous for coaching sessions. And so, maybe you're going to rate those a 1 or a 2 or whatever. And then, but you love learning, and you're enrolled in some continued education, certification, whatever, something like that. And you—or you go to a webinar and you're like, 'Ooh, those are all 3s.'

Now, that's a little different because it's like, that just kind of shows you, that's more like, 'I'm comfortable here, and I'm not comfortable over here.' You just want to make sure you're noting that, versus what I'm talking about is a little more like, I'm doing the things, I'm running my business, and I'm just really looking at what are the things that really increase my energy and what are the things that drain my energy. Not just what are the things I'm super comfortable doing versus uncomfortable.

Because I'll be honest, there are some things that I feel very uncomfortable doing, but afterwards I might give it a 3, right? Because it does light me up and it energizes me when I'm actually in there doing it, even if I feel a little apprehensive going into it, whatever the thing is.

Okay, now let's look at some different ways you can use this rating system. So, the first one is very similar to what I just described. It's like a task energy rating, right? So that's like, here's my workday. I'm going to look at each of my tasks, give them a rating. So that's one way you can use it. Another way is rating client energy, right? Like the clients that you're coaching all day during your work hours and just rating those.

Right? And what you might be looking for there is it could be the specific client, right? Is there something about that client that you love, that you don't love? That could maybe be what you're looking for. It could also be topics. So even within one client session, you might have several different ratings, right? You might take note of, when we were coaching on this, loved it, couldn't get enough of it. But then when my client wanted to switch

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to talking about this topic, I really felt blah, I didn't really want to do that. I wanted to go back and talk about the other thing. All of that good information, right?

And this can also be true again, if you're coaching groups at all, you can start to take note of that, right? So not just the one call—you don't have to rate just that—but you can rate coaching the different clients within the call, or the different tasks you're doing within the call. Maybe you're teaching, maybe you're workshopping, maybe you're brainstorming, maybe you're coaching—so many different things could be happening. And so you could even split it up by that and rate your energy per each of those things. The next one might be rating some of your systems.

How clear are they? Probably the more clear and organized they are for you in your way, the more you'll look forward to doing the task, the more they will energize you and light you up, versus the ones that feel very messy, clunky, confusing—all of that are probably going to be 1s.

You could also consider content or delivery energy. Right? So this could be when you're creating or delivering content. So maybe writing emails, writing social posts, writing blogs or podcasts. Writing a book if that's something you're working on, right? Anything that you're writing or any content that you're creating. Or let's say you're creating content for a workshop or a webinar, or a new course, a new program, a new whatever—fill in the blank, any of the things.

You could rate those. And then you could even split those up between the creation and the delivery. Right? Maybe you love planning a workshop, but you hate delivering it. Or you love thinking through a process for your clients, but then when you get in there and actually do the process, it feels super clunky. Right? This is another area where you can use this rating system and do an energy audit.

One thing that I tell my clients often is that whatever feels easy for them is their genius, right? When it comes to content and delivery. So whatever you

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could kind of just write about right now, create content around right now, deliver, teach to your clients, teach a workshop on—that is your genius. And I know it doesn't feel like it because it feels so obvious to you. But I promise you, whatever that thing is or those things are, are the things that when other people hear it, they're like, 'Oh my gosh, that's amazing.'

Now, again, remember you can also use this with your clients. You can use this exact same system and have them use this rating system to do an energy audit in any area of their life. Right? So if you're a relationship coach, you could use this for, develop some categories where they can rate their interactions with their partner or, if they're dating, right? Their dating experiences, or the steps of dating that they like doing versus don't like doing. Their relationships with their kids, with their parents, with whoever, anyone.

You could also use this as a—if you're some kind of health or wellness coach—what parts of a workout, what parts of meal prepping, what parts of any of the things that you're helping them do. They can do an energy audit, right? This could also be an audit around—sometimes what's draining our energy is the things that we're just thinking about throughout our day, not even when we're actually doing them. So you could work it into that somehow. But I think you get the point, right? You can use this in so many different ways and so many different aspects or areas of your life, and you can make it as simple as possible.

So what this looks like for me currently is I've just been taking some notes each day, and I haven't even been perfect. I haven't written down every single thing. Sometimes I come back at the end of the day and fill some things in. And I'm just doing right now a task energy audit throughout my workday. And because I have some changes coming up, I'm really right now using this time to take a really good look at, 'Oh, what maybe needs to shift? What's lighting me up? What isn't lighting me up? And why?'

And so I just have a list of tasks, and then I just put a 1, 2, or 3 next to them. And then I might take a little note, if there's something I want to make

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note of, right? Maybe it's like, 'Oh, I actually usually love doing this thing. I just don't love doing it at 8:00 AM.' Or, 'I often don't like this thing, but this week I did it differently, and now it's a 2 or 3 instead of a 1. That's interesting.'

And because I've done this before, I'm pretty efficient at it, and I kind of know what notes to take in order to, when I look back later, so I can see, really get a great picture of everything that I'm looking for. And that's something that you just have to learn kind of with practice, right? What does feel really useful for you to know and to measure.

So then the question becomes, I'm sure, 'Lindsay, what do I do now that I have all of these ratings?' I'm going to tell you all the different ways that you can use these numbers for your advantage to really help you craft a business that you feel so much more in alignment with and that just feels so much more fun for you to run. Right?

So, I'll use some examples. So let's say that you are a pretty, fairly booked coach. You work one-on-one with your clients, and throughout the week you have quite a few one-on-one clients. Let's say you have 15. So you decide for the whole week, you're going to go through and do an energy audit for each of your client sessions.

And let's just say that you are some sort of nutrition coach, right? And you're helping your clients with nutrition in some way. And you're also coaching them, right? So it's like the nutrition because that's your background, plus you throw in some mindset and some whatever type of coaching it is that you do. Alright?

So now you have 15 clients, and throughout the week, the whole week or maybe two weeks if, let's say you do sessions every other week—however long it is to get all of your clients into the rating. And you go through and rate, and you can see you have some clients—you have lots of 3s, right? These clients are all amazing. I love working with them. You have maybe a

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couple 2s, and maybe you have a couple 1s. Or maybe you have a lot of 1s, which is something you definitely want to know, right?

So then what you can do is when you can go back through and because you've noted—you've made a note of their names and maybe what you were coaching on, and if there were any other notes that felt important, hopefully you took those—and what you can do now is compile all of that information and look at it and see, and use it to really see who is a perfect fit for your coaching. Right?

And by perfect fit, I just mean the clients you love working with, the things you love coaching on, and the clients that are getting great results, right? Probably if your clients are getting great results, you usually also love working with them. Those tend to go hand in hand.

And what this is going to do is make your client experience better and better and better over time because if you use this information to your favor, what you can do is start including it in your marketing, right? Making sure you're speaking to those trends, whatever the trends are, and the clients that you love working with, that light you up, that energize you.

And maybe even making sure to speak against the clients that you don't love working with. Now, when I say against, I don't mean in a mean way or in any way, any fashion that is like, 'They're bad, these clients are good,' but just kind of, 'This is who this is for, this is who it's not for.'

So I'll give you an example. Maybe using that same example, right? Let's say you're a nutrition coach. Maybe some of your clients, you notice discrepancies around. Some of your clients come fully prepared. They've done all the things, they've followed whatever the food plan was. They have significantly decreased the stomach aches they were having or whatever. They are just eager for more information. They love the coaching, they're very self-aware, and you just feel like you're moving forward so quickly. Right? Maybe there are—there are definitely things that come up that are like road bumps, but they flow with those.

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And then maybe you have some clients who are consistently not doing the things and just you kind of feel like, 'Okay, do you really want this or do you not?' Right? And you're coaching a lot maybe on, 'Are they worth paying this much attention to?' or 'Are they worth?' Right? Like worthiness or something like that where you are like, 'That is not my—not my favorite thing to coach on.'

So now you just take note of that, and then you can start to implement that into your marketing, right? You can speak to, I'm ready for the people who want to move forward, who want to solve this stomach thing they've been having for years, who want to make gains for their weightlifting competitions coming up, who want to—whatever the thing might be that a nutrition coach might be working, helping their clients work towards. You can start to really speak much more clearly to that.

And then not only are you having more fun as the coach, but it also helps your marketing get clearer, it helps the way you speak to clients and potential clients get clearer, and then your clients are having an even better time working with you and creating even better results. And I want to be clear, it could also be the other way around. Maybe you love working with the clients who you get to help with self-worth stuff, right? And identity stuff, and maybe that is your jam. Then that's like, okay, great. Then that's just information, right? Then you get to start speaking more and more and more to those clients.

So that's just one example of how this is useful, but hopefully you can see if you start to do that in other areas, how it can be really helpful. Right? So for example, if you do it for tasks and you just notice every time you have to write emails, you have 1s, right? You're just like, 'This is not my favorite.' Then you can start to strategize, okay, what are different ways? Do you have to send that many emails? Are there different—can you send voice notes instead? Can you record videos for your clients? Can you—right? There are so many different options. It doesn't always mean that you're going to be like, 'Okay, never sending an email again,' but maybe.

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I mean, at this point, there are so many creative solutions. Even maybe something like, okay, those are the tasks where I really get AI involved and have that support, right? Maybe you'd rather spend your time kind of taking a minute, really training AI, creating a custom GPT or something that just really helps it understand your voice, who you're talking to, all the things. And now you're going to have it help you write some emails or help you create content or whatever the thing is that just always feels like it's draining you.

And then as you start implementing it, it just feels easier and easier and easier. It overall makes you feel better throughout your days, throughout your work weeks, which, of course, is always going to lead to better results in your business and better client feedback. Which even though it seems like those two things might not be directly related, they totally are, right? Because if you are loving what you're doing and feel much more lit up by your business, your clients are going to feel that in every interaction that you have with them.

This almost matters to me, in my opinion, more than the exact strategy that you're using to build your business, to coach your clients, to whatever it is that you're measuring. To me, this matters more or is going to have a sometimes bigger impact than obsessing over, 'Is this the right strategy? Is this the right strategy?' Or at the end of the day, it will also just really inform what strategies you choose, how you choose to build your business, how you choose to coach your clients depending on what you love and what you don't love.

Okay, so hopefully this was super, super useful for you. I urge you to try it. Seriously, try it this week, try it next week. You can do something just for a day just to kind of see. You might actually be surprised at what you find.

I have often been surprised at what I see when I'm looking at it in real time, when I've done the ratings in real time throughout the day versus, let's say if I do it at the end of the week and I try to think back over, 'Okay, what went well? What didn't?' or 'What did I love this week? What didn't?' When you're

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actually doing it in real time, you might be very surprised at some of the results you get, and hopefully, if you love this, you can really take it and edit it for yourself and for your clients. And I can't wait to hear how it goes.

If you love the idea of this, this is the exact work we're doing in Reimagine. This is actually the first time that I have put this together in a way that I'm going to be strategically teaching it in Reimagine, but I have this last round, we talked about basically this concept. I just didn't teach it so clearly or tell them how to rate their things. But moving forward, this is something we're going to be implementing because I think it is super important.

And if you love the idea of this, love doing this work and you're like, 'Yes, oh my gosh, I know there are some areas of my business that could be different or my coaching, my coaching processes, my containers, any of the things. I know there are some areas that could be different, and I just don't know how to change them.' First, start here. Second, go to the show notes, find the Reimagine link and apply.

If there are still spaces open, we will get you in, get you a call right away, and I cannot wait to do this work with you. It's seriously some of my favorite, favorite work, speaking of things that light me up. Helping you build a business that lights you up and run a business and coach your clients and serve your clients in a way that helps them create even better results and lights you up—that is exactly what lights me up. So, hope this was helpful. Talk to you again 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.