

## Create Learning Tasks to Invite Active Client Engagement

The world of medicine offers a powerful metaphor for the journey of transformation. In medicine, there are two primary forms of care: allopathic and holistic. Allopathic care, the dominant form in Western medicine, focuses on the relief of symptoms. In Western medicine, almost all illnesses are treated through allopathic means, be they chronic, acute, or temporary. Got a cold? Pop some cold medicine in your mouth. Got a headache? Take some aspirin to relieve the pain. Neither cold medicine nor a pain pill gets at the cause. They just relieve some of the suffering.

Holistic care is about seeking ways of living a healthy life. When faced with illness, a holistic care practitioner will likely seek to find the causes of the illness and restore the person back to wholeness or health. The key question for the holistic doctor is: what conditions are present in the mind, body, and/or spirit such that the symptoms' and their causes are occurring or reoccurring?

The basic approach of all holistic forms of medicine is to treat the whole person and to enable patients to step up and own the process. In other words, patients are asked to learn to take care of themselves, and to own their symptoms, both causes and effects. The holistic care practitioner becomes a teacher and guide, while the allopathic practitioner acts more like a micro-managing boss.

### **The Necessity of the Active Client**

This sense of ownership of one's own growth and learning is crucial to transformational coaching. Owning one's own patterns as a coachee and the exploration to find and embody an alternative are the essential elements in addressing any deeply rooted pattern. For a transformation to endure, it requires clients to engage in the process much as they would engage in their own healing were they to work with a holistic medical doctor. Instead of buying the notion that the client is a victim of circumstances beyond his or her control, the key is to guide the client to sit front and center in his life. To be effective agents of transformation, your clients must adopt the attitude that their patterns, conditions and tendencies are their own. And no pill or quick fix strategy will fix that.

Shifting away from a "doctor, please fix me" paradigm is perhaps the most crucial step in the process of transformational coaching. It entails helping your client not only to see and explore their paradigms, but to believe that they can become an active agent, even the leader, of their own healing. This means setting the right expectations, helping the client become more spacious, slowing down the process, and offering learning tasks designed to help the client deepen her self-awareness.

### **Learning Tasks**

Learning tasks are offered by the coach as a tool to keep learning in between coaching sessions. Learning tasks put the client in charge of their own transformation and focus their attention on learning, often on a daily basis, for the weeks or months required to complete a transformational arc.

I came to the notion of learning tasks thirty years ago, having been deeply involved in a spiritual community early on in my adult life. Members of the community practiced self-awareness and being present. At the end of each weekly meeting, our teachers gave us simple daily tasks such as to pay attention to each bite of food that we ate. They also wanted us to be fully aware of our bodies for the first five minutes after waking up. These tasks turned out to be more challenging (and more rewarding) than I expected and became a crucial feature of my learning processes.

Here's an example of a learning task: Recently I asked a client who tended to judge others quickly to spend ten minutes every day writing down at least ten of her negative judgments. I also asked her to write down the thoughts that came to her – beliefs, assumptions, self-talk. She was not to judge her judgments but, instead, simply to observe and record them. Two weeks later, when we reviewed her journal, we found clear patterns in her judgments. Exploring these patterns turned out to be the way into her personal paradigm, which we were then able to work on at a deeper level.

Many learning tasks are designed for awareness and discovery. Some are designed to experiment with the potential for a breakthrough. An example of this might be when working with someone controlling or afraid to trust others. I might invite such a person to pick a challenging situation and let go of the need to control the outcome. The key in this example is for the chosen situation to be neither too hard nor too easy. If the situation is too challenging, the client will fail. It will be discouraging and possibly reinforce the client's belief that control is a good thing. If the situation is too easy, it will not be potent enough to disrupt the person's belief system.

Creating tasks that lead to transforming a client's personal paradigm requires creativity and clarity on the part of a coach. For clients, it requires courage and a degree of diligence. When imagined and carried out well, such tasks will often lead to deeper discovery that will ultimately ignite transformation.

#### **Four Different Kinds of Learning Tasks**

While I have not found a perfect system for when to create tasks for optimal success, I do follow an overall pattern. It looks something like this:



Early on, the tasks I offer are observation oriented, designed to help a client see his own pattern without judgment. Often, this is in the form of: "Over the next

(fill in time frame), please observe your tendency to (fill in their typical pattern you want the client to observe). Take notes in your journal every time you do (your typical behavior). Note the setting, the situation, your thoughts, feelings, reactions, and behavior. Do this at least (X number of times). Then join me in our next session to discuss what you are seeing about yourself. Please do not try to analyze yourself. Simply observe and take notes."

If someone is observing their typical behavior, since they want to change that behavior, they are likely to sit in judgment of themselves. If they are in judgment, their ego is also likely to be highly engaged, quietly in the background, trying to protect them from the behavior their ego finds problematic. One of the ways the ego succeeds is to keep people from seeing themselves. It offers rationalizations, excuses, and even distorted self-understandings, all designed to keep some semblance of belief that all is good. By asking a person to simply observe rather than analyze or judge, you are, in effect, attempting to help them bypass their ego defense so they can see themselves more clearly.

Rather than tell someone to try to stop their self-judgment, it is best to invite openness and curiosity. Giving them a positive mandate to observe is very different than asking someone not to judge themselves. When you ask them not to judge themselves, they will often decide that judging is bad and as such they will judge their own judgmental tendency. This, in effect, keeps the judgment function in full engagement. Instead of asking them to stop judging, ask them to observe openly and with curiosity. The positive assignment can and often will more easily bypass their ego.

After multiple tasks designed for observation, the next set of learning tasks are typically designed for insight. They can be readings, examinations of patterns, curiosity about causes of patterns, self-reflections about patterns, etc. Insight is best done after observation.

The next set of tasks are usually experimental in nature and occur as the next stage of the transformational journey. An example might be to say to someone who is uncomfortable with conflict, "I'd like to suggest that you identify three people in your life with whom you feel tension and want to resolve that tension. Pick people with whom it might be easy. Later, you can try it in more difficult situations. Then follow the steps we outlined earlier and observe what happens." Note that it is important early on to pick easier situations, so the client feels a sense of success. That success will embolden the client to want more. It also helps them to build skillfulness before going after bigger and more challenging situations.

The final set of learning tasks is often designed to ingrain new habits and solidify new insights.

### **Debriefing Learning Tasks**

The design and implementation of learning tasks tells only half the story for how powerful they can be in the journey of transformation. Equally important is how you discuss the lessons learned from the tasks. Almost all sessions end with

some kind of learning task and begin by going over what the client learned or discovered through the previous learning task. During this part of the session, we are mining gold from the task. Here's how it often occurs.

After the usual greetings and check in of the clients' state as they come to their sessions, I ask them how their learning tasks went. They share what they did and what insights or observations emerged. As they do, I listen, offer my perspective, and invite more deepening through questions. So much evolves naturally from there that it is hard to describe the next steps. They include anything from further psychological exploration, identification of stuck points, practice through role-playing, insights about their paradigms, and further opportunities for learning through more tasks.

While I rarely give advice (or at least I try not to), I do offer perspective. The ability to help a client frame or reframe their experience or make sense of it through an alternative perspective is one of the most powerful things we can do as transformational coaches. Through this, our clients learn to see themselves differently.