Trula Coach Reference Guide

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A Little Background on TRULA

Trula Foundation originated aiming to get ahead of mental illness on college campuses and was inspired by the late Lindsay Atwood, a business leader in Utah, a philanthropist, and a member of the Board of Trustees at Dixie State University.

One afternoon, Lindsay was at lunch with the DSU President when the president received a phone call sharing that a student died by suicide. That phone call impacted Lindsay. He had lost both of his brothers to suicide and this was an issue that touched him deeply. He called his nephew, Jeremiah Riley, a few days later and said, “We need to do something! We are losing students to suicide on campuses when there are so many people and resources to help.” Lindsay and Jeremiah, along with Rick Atkin, put their minds together, and developed a concept whereby they could better align resources on college campuses to help students needing support, *when* they need support. The result was the creation of Trula Foundation, a non-profit in Utah that specifically focuses on finding and training students to be a support to their peers on college campuses.

Lindsay was so passionate about the need for peer coaching as an intervention that he donated $1 million of his own money to create a scholarship endowment to award scholarships to students who volunteer as peer coaches to support their fellow students. Rick and Jeremiah further partnered with the Utah System of Higher Education to create the peer coaching program, TrulaCampus™. Trula Foundation officially formed on October 9, 2019 and began running TrulaCampus™ on July 1, 2020.

We are passionate about helping students build their confidence and increase their resilience as they pursue the goals that are important to them. We feel that peer coaching will help students on their journey to discover themselves and thrive!

What is a Trula Coach?

A Trula Coach is a student who is trained and devoted to guiding their peers into increased competence, commitment, and confidence in utilizing their potential, insight, and self-determination to accomplish their goals and create the life they desire.

The Coach’s Role

- The coaching relationship is a *Partnership* – the coach and coachee work together to reach the coachee’s goals, building resilience, enhancing wellbeing, or improving academic performance.
- The coach does not tell coachees what to do or offer advice.
- The coach understands that the coachee is whole, resourceful, and has all their own answers. The coach helps the coachee discover those answers by asking powerful, thought-provoking questions.
- A Trula Coach is “trained and devoted to guiding others into increased competence, commitment, and confidence” utilizing their potential, insight, and self-determination to experience increased well-being, accomplish their goals, and create the life they desire.

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Coaching Best Practices

Empathy and Active Listening

- Demonstrates genuine care for coachees and listens actively without judgment.
- Asks thoughtful, open-ended questions to understand the coachee's perspective.
- Approach each conversation with your coachee with curiosity and care.

Clear and Consistent Communication

- Contacts new coachees within 24 hours of sign-up to welcome them and provide guidance.
- Sends reminders on the day of the session to confirm timing and readiness.
- Follow up with coachees via text (if preferred) to track progress on goals and offer encouragement.
- Always asks for permission before initiating any form of communication.

Accountability and Professionalism

- Session Changes or Absences:
  - If you are unable to attend a scheduled coaching session, communicate with Alexis directly beforehand.
  - Do not cancel a session without informing Alexis, as she monitors sessions and will need clarity on the reason for the cancellation.
  - Promptly work with the coachee to reschedule or find an alternative solution to avoid disrupting the coachee's experience.
- Ensures all missed events or commitments are made up within a week to stay on track.

Preparedness and Reflection

- Writes reflective notes after each session to capture insights, progress, and areas of growth.
- Reviews these notes prior to the next meeting to ensure continuity and personalized coaching.

Goal-Oriented and Encouraging

- Helps coachees set clear, realistic, and actionable goals tailored to their needs.
- Regularly checks on goal progress and celebrates milestones, fostering motivation.

Adaptability and Respect

- Adapts to the unique needs and preferences of each coachee while maintaining a structured approach.
- Respects boundaries and builds trust through clear, honest, and supportive interactions.

Commitment to Growth

- Continuously seeks feedback from coachees and lead coaches to improve their coaching style.
- Participates in training sessions and team meetings to stay aligned with the program's mission and best practices.

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Trula Coach Core Competencies

Presence

The Trula Coach:

- takes time to center themselves prior to each session and affirm the coachee.
- expresses appreciation for the coachee's skills, talents, time, strengths, values, etc.
- **shows up authentically, recognizing they don't need to have the answers and that the coachee is whole, capable, and resourceful.**
- demonstrates support, empathy, and compassion for the coachee.
- acknowledges and supports the coachee's emotional expression.
- **demonstrates curiosity and non-judgement in order to learn more about the coachee.**
- practices cultural humility by honoring each individual's personal life experience and refrains from making assumptions.

Active Listening

The Trula Coach:

- **reflects or summarizes, using the coachee's own words to ensure clarity and understanding.**
- listens for values, goals, needs, passions, and desires.
- **allows space for silence, pause, or reflection.**
- notices and explores the coachee's energy shifts, non-verbal cues, or other behaviors.
- allows the coachee to finish speaking without interrupting unless the coach has a stated coaching purpose for doing so.

Self-Awareness and Self-Management

The Trula Coach:

- **honors coachee autonomy and refrains from having an agenda for the coachee or for the session.**
- is aware of and supports the coachee's agenda by taking time to fully understand and reflect on what the coachee is saying before beginning to problem-solve.
- partners with the coachee to support the coachee to choose what happens in each session.
- asks permission before sharing, telling, teaching, or offering an opinion (ABCs).
- allows the coachee to do most of the talking.

- **recognizes their own need to “rescue” the coachee and self-manages.**
- acknowledges personal bias and honors and respects other perspectives.

Facilitating Coachee Growth

The Trula Coach:

- **explores the coachee’s understanding of their current reality in comparison to where they want to be.**
- asks clear, direct, primarily open-ended questions, one at a time, at a pace that allows for thinking, feeling, or reflection by the coachee.
- shares – with no attachment – observations, intuitions, comments, thoughts, or feelings, and invites the coachee’s exploration.
- inquires and clarifies the coachee’s overarching goals and agenda for each session.
- inquires about positive experiences from the past that the coachee can use going forward.
- **invites the coachee to reflect on the learning, growth, or insight they are taking away from the session.**
- partners with the coachee to consider how to move forward, highlighting resources, support, potential barriers, and accountability to support success.
- celebrates the coachee’s progress and learning.

Being a solid Trula Coach

The Trula Coach:

- communicates intentionally with their coachee; reaches out at initial sign up, communicates if there is a conflict, etc.
- **shows up early to sessions and is dependable.**
- follows through on commitments they make to the coachee.
- conducts sessions in a private, quiet space, free from distractions.
- maintains a formal relationship with their coachee.
- fulfills all coaching requirements including attending meetings and communicating on Slack.
- **continuously seeks to improve their coaching skills.**

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Coaching Session Outline

This is a general outline for a coaching session. Try not to think of this as a checklist, but more as a guide that can help you facilitate the coaching session's flow. Each section offers sample questions and discussion point examples. Find what works well for you!

Pre-Session (5-10 minutes)

Purpose: Bring your attention to the present and prepare for the session.

- Coach contacts coachee the day of the session to confirm the coaching session.
- Coach centers and prepares (review actions from last session and do any other needed preparation **-** perhaps having a notebook handy, having the tech app open for your notes, or having the coach portal open for easy access to coaching resources).
- Set your intention for focusing on what the coachee wants.

Beginning

Purpose: Build rapport, check in with coachee, check in on previous goals, and determine what to discuss in this session.

Centering exercise with the coachee (guided breathing, imagery, journaling, etc.)

Review / Checking In **(VERY BRIEF)**

- How are you doing right now?
- What is going well right now?
- How did last week go?
- What successes did you experience? What challenges did you encounter?

Establish Session Agenda

The Session Agenda is how we know where we are going during this session. An analogy is if the Coaching Goal is traveling from SLC to San Francisco, the Agenda is how far are we going today, what route are we taking, and where are we stopping for lunch? Checking in to see if it seems we are moving in the right direction can be helpful. It is critical for the coach to have a clear understanding of what the coachee wants to gain from the session before taking off in a certain direction.

- What do you hope to take away from this session today?
- How will we know when we get there?

*Note: while going over the previous week's goals, the agenda for this session may become apparent to the coachee. This could be the place that they experienced great success and want to carry that momentum forward, where they struggled, where they are experiencing ambivalence, etc. This session agenda will carry you into the generative moment. Creating an agenda during life coaching sessions can be challenging, especially when the client struggles to articulate their goals or direction. In such cases, it's crucial for the life coach to employ active listening and probing questions to uncover underlying themes or desires. By fostering a safe and non-judgmental space, the coach can encourage the client to explore their thoughts and feelings openly. Additionally, techniques like visualization exercises or journaling prompts can help the client gain clarity and identify areas they wish to focus on. Flexibility is key; the agenda may evolve as the coaching progresses, adapting to the client's changing needs and insights. Ultimately, the goal is to collaborate with the client in co-creating a meaningful agenda that aligns with their values and aspirations, fostering growth and empowerment throughout the coaching journey.

Middle

Purpose: Brainstorming, figuring out how to move forward.

Generative Moment

- Keep circling back to the session agenda – what is the coachee hoping to get out of this session today? Does each moment build toward this goal?
- What might get in the way of you getting what the coachee wants in the session today?
- Where do you feel energy or emotion?
- What are the coachee's strengths and values? How do they align with their goals?
- Use brainstorming and creativity.

End

*Purpose: Coachee should leave with a takeaway or something to work on and a plan to **hold themselves** accountable.*

Action Steps

- Have the coachee restate their action step/s, maybe even write it down.
- How will they know when they accomplish this step?
- When will they do their action step?
- What barriers will they need to overcome to accomplish this?
- What will support or facilitate their success?
- How will you hold yourself accountable?
- How can I [coach] support you with this action?
- Connect the goal to the coachee's motivation and "why" for establishing the action step.
- Use a scale to determine how motivated or confident the coachee is about their action step. ("On a scale of 1-10, how confident are you that you will accomplish this goal?")

Session Close

- Try to end on a positive note, perhaps expressing appreciation for the coachee's work in the session.
- Ask for feedback on how to make the coaching session more effective.
- Schedule the next session.

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GROW Model

	Key Concept	Description	Questions to Ask
Goal	What do you want?	Coachee identifies what they want to achieve in the session—determines the focus for the session.	What is your goal? What do you want to get out of this session? What would be the best use of our time? What would you like to accomplish?
Reality	What is the present situation?	Raises awareness around the current situation—examines how the current reality impacts their goals.	Where are you currently? Describe the current situation for me. How are things now?
Options	What can you do?	Identify and assess possible options — encourage solution-focused and action-oriented thinking and brainstorming.	What options are there? What could you do? What's the most important thing to do next? What else could you do?
Will	Will or Way Forward: What will you do? By when?	Define the next steps and develop a specific action plan—foster motivation to maintain momentum and accountability.	Which options are most effective? What exactly will you do? How can you overcome any barriers? What will you do? By when?

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Priorities for Each Coaching Session

First Session	Establish a coaching agreement (written coaching contract is provided automatically through the Trula signup) Establish rapport (***Appreciation**, **Advocacy, Inquiry***) Take a wellness inventory Discuss the big picture ***(Inquiry, Advocacy)***
Ongoing Sessions	Prepare for session Coaching session Assess strengths and needs Ask for feedback After-session activities (asking questions, self-reflection, what can I do better?)
Last Session	Reflection • Growth areas • What did you learn? • Takeaways Ask, “Now what?” Maintenance plan. Provide closure for the coaching relationship Send Exit Survey to coachee
Coaching Question to ask at end of each session	“On a scale of 1-10, with 1 being the least valuable and 10 being the most valuable, how would you rate our session?” “How can we make it more valuable for you in the future?”

Wellness Wheel

Open-Ended Questions

What are they?	Questions that cannot be answered with a simple “yes” or “no” response.
Why ask them?	These questions give the coachee an opportunity to open up and explain more, providing the coach with a better understanding of their experience and creating more room for reflection and additional questions and exploration.
Questions that start with:	How... What... Tell me about... Explain... Help me understand... Describe for me...

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Reflections

How to reflect	Repeat back what you heard to ensure understanding Reflect on your own perceptions Reflect the feeling or the thought – “feeling/thought empathy”
You can start with...	What I am hearing is... It sounds like... It seems like... I hear you saying... It sounds as though... I am noticing...

Ask Before Coaching (ABC)

What does it mean to ask?	Before offering your own experience, suggestions, advice, etc., always ask for permission. After providing some insight, ask how it sits with them.
Why ask?	Asking permission maintains the coachee’s autonomy and respects that they are the expert on their life.
Examples:	“Are you ready for our session?” “May I offer a few suggestions?” “Are you ready to get started?” “I’d like to share something from my own experience. Would that be okay?” “I sense that...how does that sit with you?” “I have some thoughts about that, would you like to hear them?”

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Stages of Change and Coaching Strategies

Stage of Change	What it means	Coaching Strategy
Pre-contemplation	No intention to change in the foreseeable future	**Key coaching strategy: raise awareness**, help the coachee access **more information** to help them move into the action stage.
Contemplation	Considering making changes but have not yet made them	Key characteristic is ambivalence. **Key coaching strategy:** help the coachee **explore their ambivalence** and options and help them feel engaged and moving towards readiness and action.
Preparation	Increased commitment to change, beginning to make small changes	**Key coaching strategy:** help the coachee **increase commitment to change.** Help the coachee develop a vision for the future and consider **small achievable action steps**. It is important to reinforce new behaviors and celebrate achievements.
Action	Engaging in new behaviors for a short period of time	**Key coaching strategy:** build on **past successes and** maximize self-directed change, **increasing goals and strategies** to maintain change over time.
Maintenance	Consistently engaging in new behaviors	**Key coaching strategy:** build on **past successes and** maximize self-directed change, **increase goals and strategies** to maintain change over time.

SMART Goals

Specific	Be as specific about what you will do as possible.
Measurable	How will you know whether you accomplished the goal?
Achievable	Is this something you can accomplish?
Relevant	How is this goal relevant to your overall vision?
Time-Bound	By when are you going to do this?

Mindfulness Script

Mindfulness Script Example (3-minute script with pauses)

Make sure to read this script slowly, and in a normal-sounding, soft voice, feel your own mindfulness and grounding as you read these words and guide your coachee.

First, I'll invite you to close your eyes... or shift your gaze downward, whichever feels more comfortable for you... right now.

Find a comfortable position, maybe with your feet flat on the ground, sitting up tall, with your hands resting in your lap. Alert, and present... Take a moment to adjust... and find what feels good for you.

Now, become aware of your breath. Without changing it, notice your inhale... and your exhale... Go ahead and go through a couple of breath cycles at your own pace. *pause*

You may notice your mind start to drift away... Acknowledge any thoughts and gently let them go. Come back to your breath. *pause*

I invite you now to expand your breath... Inhale and exhale a little deeper... Notice what that feels like. What has changed for you? *pause*

Perhaps you want to add a reminder to bring yourself to the present... Maybe saying the words "this" as you inhale and "moment" as you exhale. *pause*

Now as we come to an end, start to wiggle your fingers and toes... Move your wrists and ankles... And when you feel ready, go ahead and open your eyes.

Daily/Weekly Trula Coach Tasks

- Confirm sessions with coachees
- Input notes within 24 hours of a coaching session
- Respond to Slack messages promptly (check daily-ish when possible)

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Note-Taking

Don't...	Instead...
Don't include identifying information in notes	Use "coachee" or an alias, number, etc. to identify each individual
Don't imply a diagnosis in notes, ex. "Coachee has depression"	Write your perception, ex. "Coachee may be showing signs of depression"; "coachee seems to be anxious"
Don't make assumptions, ex. "Coachee is happy"	Maintain objectivity by writing your perception, ex. "coachee appears to be happy"; "coachee said they had a good day"; "coachee seems like they are doing better"
Don't save any notes from appointments	Store notes in the Trula Tech App within 24 hours of the coaching session; if you want to take handwritten notes, make sure to shred them. If you take notes on a computer, delete the files.

Notes Format for Tech App

Let's take REFLECTIVE notes! Here is the notes format for the notes you share on Trula Tech App:

- What was the coachee's goal?
- What was the session's agenda?
- Reflections from the session?
- What were the coachee's action steps?

Personal Notes Suggestions

Check-in	How was the coachee's week? How did they do on their goal from last session? How are they doing today?
Key points/observations	Anything you notice that you want to write down; use objective language
Motivation	What is motivating/inspiring the coachee to accomplish this goal? What is their "why"?
Obstacles	What stands in the way of the coachee accomplishing their goal and how will they work around that?
Facilitators	What will support them to accomplish their goal? (Could be: support system, accountability, something they're already doing, etc.)

Agenda vs. Goal

In coaching, a "goal" represents the desired outcome or achievement a client wants to reach through the coaching process, while an "agenda" is the structured plan or outline of topics and key points to be discussed during a specific coaching session to work towards achieving those goals; essentially, the agenda is the roadmap for each session to reach the overall goal.

Key differences:

Scope:
A goal is a long-term objective, while an agenda focuses on the specific actions and discussion points for a single coaching session.

Flexibility:
Goals are usually more fixed, while an agenda can be adjusted based on the client's needs and progress during the session.

Focus:
A goal defines the desired outcome, while an agenda outlines the steps to get there.

Example:

Goal:
"Improve public speaking confidence to deliver presentations effectively at work."

Agenda for a coaching session:
"Review past presentation experiences, identify areas for improvement, practice delivery techniques, discuss strategies to manage nervousness, plan next steps for implementation."

Coaching vs. Counseling

Therapy and health coaching both aim to improve well-being but differ in focus and approach:

Therapy: Focuses on diagnosing and treating mental health conditions. It delves into past experiences, emotions, and psychological patterns to address issues such as depression, anxiety, and trauma. Licensed therapists use evidence-based techniques and provide a clinical setting for treatment. A therapist is an expert in mental health and looking for and aware of symptoms that may be part of a diagnosis and need a particular type of treatment.

Health Coaching: Concentrates on overall wellness and achieving specific health-related goals, such as weight loss, fitness, or stress management. Health coaches provide guidance, motivation, and support, often using behavior change strategies. They are not typically qualified to diagnose or treat mental health conditions but focus on lifestyle modifications and goal-setting. A coach views the coachee as whole, complete and resourceful and acts as a partner in setting and achieving goals but acknowledges that the coachee is the expert in their own life.

Peer Coaching: A Peer Coach is also focused on overall health and well being with limited training and experience and without certification. Their main goal is to partner with their coachee in exploring goal setting strategies that enhance well being and improve their overall college or University experience.

Therapists require specific licensure and extensive training in mental health, while health coaches may have various certifications and training related to wellness and behavior change.

Coaching vs. Therapy by Topic

Here are some issues that could be treated with coaching or therapy, depending on the specific needs and nature of the issue. These distinctions can help guide whether coaching or therapy is more suitable based on the specific challenges and goals individuals face. It's important to consider seeking professional advice to determine the most appropriate approach for each situation. If you are unsure whether coaching is the appropriate level of support for a client, please reach out to your Wellness Coach Coordinator.

1. **Career Transitions:**
    - **Coaching:** Career coaching can help with setting goals, exploring career options, improving interview skills, and enhancing job performance.
    - **Therapy:** Therapy might be more appropriate if the transition is causing significant emotional distress, such as anxiety or depression related to job loss or major career changes.
2. **Self-Esteem and Confidence Building:**
    - **Coaching:** Life coaching can focus on building self-esteem, setting personal boundaries, and improving assertiveness skills.
    - **Therapy:** Therapy might be necessary if low self-esteem is rooted in past trauma or deeply ingrained psychological issues that require emotional processing and healing.
3. **Relationship Issues:**
    - **Coaching:** Relationship coaching can help with communication skills, conflict resolution, and goal setting.
    - **Therapy:** Therapy is recommended if there are underlying issues such as trust issues, emotional abuse, or past trauma affecting the relationship dynamics.
4. **Goal Setting and Achievement:**
    - **Coaching:** Goal-oriented coaching can assist in setting SMART goals, creating action plans, and maintaining motivation and accountability.
    - **Therapy:** Therapy might be beneficial if there are psychological barriers such as fear of success/failure, perfectionism, or unresolved issues that hinder goal achievement.

5. **Stress Management/feelings of anxiety:**
    - **Coaching:** Stress management coaching can focus on practical strategies, time management, mindfulness techniques, journaling, or deep breathing to cope with stress and anxiety.
    - **Therapy:** Therapy is appropriate if stress is linked to deeper emotional issues, trauma, or mental health disorders such as generalized anxiety disorder or PTSD or if anxiety is debilitating or lasts more than a week or more.
6. **Grief and Loss:**
    - **Coaching:** Grief coaching can support individuals in processing emotions, setting goals for healing, and finding meaning after loss.
    - **Therapy:** Therapy is often necessary for complex grief reactions, unresolved trauma associated with the loss, or symptoms of depression and anxiety.
7. **Health and Wellness Goals:**
    - **Coaching:** Health coaching can help with lifestyle changes, nutrition planning, fitness goals, and maintaining overall well-being.
    - **Therapy:** Therapy may be needed if there are underlying psychological factors contributing to health issues, such as disordered eating patterns, body image issues, or chronic stress affecting physical health.
8. **Feelings of sadness, lack of energy or depression:**
    - **Coaching:** A coach can help a coachee explore options such as starting a gratitude journal, connecting with friends, beginning an exercise program, mindful walking, improving sleep patterns or incorporating a breathing practice to help improve mood and energy levels.
    - **Therapy:** Therapy may be needed if feelings of sadness and lethargy are debilitating or last longer than a week or two. For example, if a coachee is unable to get out of bed or participate in their normal activities and school or workload.
9. **Eating or Nutrition concerns:**
    - **Coaching:** A coach can help with meal planning, exploring where to find resources for nutrition guidelines and setting goals around more mindful and intentional eating.
    - **Therapy:** A coach should never attempt to work with a coachee who is struggling with serious eating disorders such as Bulimia or Anorexia unless the coachee is already in a treatment program for eating disorders. Therapy is necessary to work with underlying psychological and emotional issues contributing to eating disordered behaviors.

Breathing Exercises in Coaching vs. Therapy

In both coaching and therapy, the effectiveness of breathing exercises depends on the individual's specific needs, goals, and underlying issues. Coaches and therapists tailor their approaches accordingly, focusing either on performance enhancement and well-being in coaching, or on therapeutic healing and psychological support in therapy. Here’s how we might approach breathing exercises we can share (such as from the Dr. Beth Videos) differently in coaching versus therapy:

Coaching: Coaches use breathing exercises as practical tools to enhance performance, manage stress, and promote well-being. Coaches focus on teaching specific techniques and guiding clients in integrating these practices into daily routines. Here’s how coaching might use breathing exercises:

1. **Performance Enhancement:** Coaches teach breathing techniques that improve focus, calm, and concentration before important events such as presentations, competitions, or exams.
2. **Stress Management:** Coaches help clients learn breathing exercises to reduce stress levels, increase relaxation, and improve overall resilience to stressors in daily life.
3. **Energy Regulation:** Coaches may teach breathing techniques that help regulate energy levels throughout the day, such as using specific patterns forinhaling and exhaling to enhance alertness or promote relaxation as needed.
4. **Goal Alignment:** Coaches use breathing exercises to help clients align their breathing with their goals, such as using breathwork to maintain motivation, overcome mental blocks, or manage distractions during goal pursuit.
5. **Integration Into Daily Routine:** Coaches support clients in integrating breathing exercises into daily routines, helping these practices become habitual and sustainable for long-term benefit.

Therapy: Therapists often use breathing exercises as part of broader treatment plans to address mental health issues such as anxiety disorders, trauma, and other emotional challenges. Therapists may use breathing techniques to help clients regulate emotions, manage symptoms, and facilitate deeper psychological healing. Here's how therapists might approach breathing exercises:

1. **Anxiety and Stress Disorders:** Therapists teach breathing exercises as part of anxiety management strategies, focusing on calming the nervous system and reducing physiological symptoms from anxiety (e.g., panic attacks).
2. **Trauma Processing:** Therapists use breathing techniques to help clients regulate emotional arousal during trauma processing sessions, facilitating a sense of safety and grounding.
3. **Mindfulness and Body Awareness:** Therapists integrate breathing exercises into mindfulness-based approaches, promoting present-moment awareness and cultivating self-compassion.
4. **Emotional Regulation:** Therapists teach clients how to use breathwork to regulate intense emotions, such as anger or sadness, and develop healthier coping strategies.
5. **Psychophysiological Disorders:** Therapists utilize breathing exercises to address psychophysiological disorders (e.g., somatic symptom disorders), helping clients recognize and regulate mind-body connections.

Troubleshooting

If...	Then...
My coachee just wants me to tell them what to do	Ask first, provide information/resources, then ask them how your suggestions sound; help them maintain their autonomy by putting the ball back in their court
Strong emotions come up in a session	Acknowledge the emotion ("I'm noticing that this is causing some emotion to come up and that is absolutely welcome"), then ask "Is that something you want to talk about with me?"

I find myself wanting to problem-solve or rescue my coachee	Take a deep breath. Extend self-compassion to yourself for your need for the coachee to change. Then respectfully explore what the coachee has to say.
The coachee brings something up that starts to feel outside my scope of practice	Remind the coachee of your scope of practice. If needed, escalate the coachee.
My coachee isn't responding to communications or showing up to scheduled appointments.	Send follow up communications twice. If the coachee does not respond, check out the "Coachee No Show/Ghosting Policy" in the coach portal for more guidance. Remove the coachee from your Tech App after two weeks with no contact.
My coachee crosses established boundaries, like contacting me outside hours and wanting to hang out socially.	Gently remind the coachee of the coaching agreement, established hours, and coaching relationship. Since this is agreed upon in the beginning, offer a simple "I want to re-visit our coaching agreement...does this still work for you?"

Coaching Themes

- **Academics -** anything about school; grades, classes, performance
- **Career -** focused on future career development; talking to a career counselor, getting an internship or relevant job, crafting a resume, understanding purpose, seeing how personal strengths apply to career, etc.
- **Confidence -** increasing belief in self; self-esteem; ability to overcome obstacles; self-worth
- **Finances -** anything relating to money; financial situation, financial goals, managing money, etc.
- **Other -** anything else not listed here
- **Physical Health -** anything to improve physical health; sleep, eating, exercise, etc.; how their body feels
- **Relationships -** improving/working on the relationships in your life, dealing with conflict between roommates, friends, family, etc.
- **Self-care -** practices focused on taking care of/focusing on/rejuvenating yourself to improve well-being
- **Social Life -** attending school activities, meeting new people, talking to others in class, creating connections, making/deepening friendships, etc.
- **Spirituality -** anything having to do with religion, sense of purpose, living in alignment with values, connecting with something larger than the self, inner peace, mindfulness, practices to facilitate these experiences and concepts
- **Stress -** helping to manage or reduce the coachee's stress/overwhelm/busyness.
- **Time-Management -** scheduling, organizing, or anything to improve time-management/productivity/maximize time outside school and work.
- **Work -** current job, maybe talking about work schedule, work-related stress, workplace dynamics, etc.
- **Coachee No-Show -** when you show up and are waiting and the coachee does not show up (after the session start time). Make sure to write how long you waited and if the coachee responded in the session notes.
- **I Cancelled -**when you cancel the session for your own reasons. Please state these reasons in the notes section

Tech Rundown

Setting up a profile

1. Follow this link: https://www.trulacoaching.com/app#set-up-profile-settings/
2. Login info
    a. Username: Email you used for Trula
    b. Password: trulacoach123
    c. If the password doesn't work - select (forgot?) on the password part and make a new password.
3. After completing your profile, go to your "my coachees" tab to check that your active coachee list is up to date (see the "coachee page" tab in this document for instructions on exiting and reactivating coachees).
    a. Exit any coachees who you are no longer coaching
    b. If any coachees need to be active on your list, search your exited coachees and click "reactivate."

Downloading App Instructions

Download the Trula App on Your Mobile Device

Both Coaches and Trula Administrators can easily download the Trula App on their mobile devices. The steps vary slightly depending on whether you're using an Android or iOS device. Please follow the instructions below based on your device type.

iOS:

1. On your iOS device, open Safari. Other browsers, such as Chrome, won't work for this.
2. Visit **trulacoaching.com/download-app**.
3. DO NOT log into your account.
4. Tap the '**Share**' button located in the menu bar.
5. Scroll down and select '**Add to Home Screen**'.
6. Tap '**Add**' to complete the process

Android:

1. On your Android device, open Chrome.
2. Visit **trulacoaching.com/download-app**.
3. DO NOT log into your account.
4. Tap the menu icon (three vertical dots in the upper right-hand corner).
5. Select '**Add to Home Screen**'.
6. Tap '**Add**' to confirm.

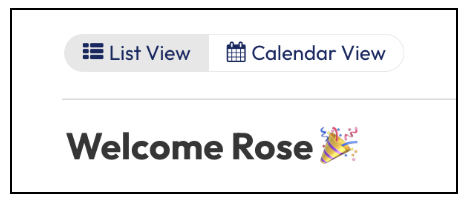
Note: You may notice the URL starts with trula.knack.com. This is normal, as Knack is the server hosting the Trula App.

Home page

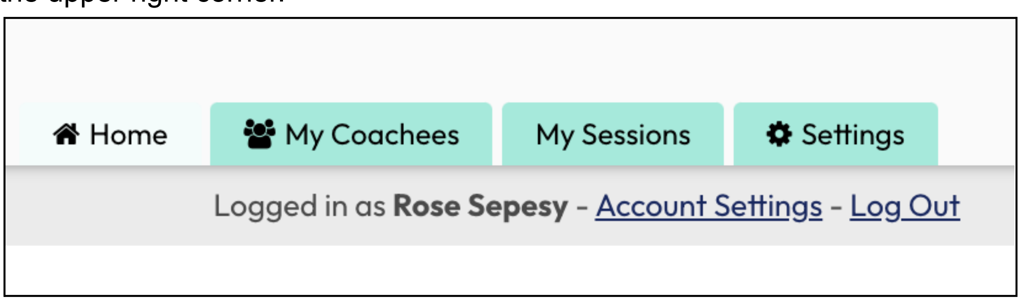
Navigation

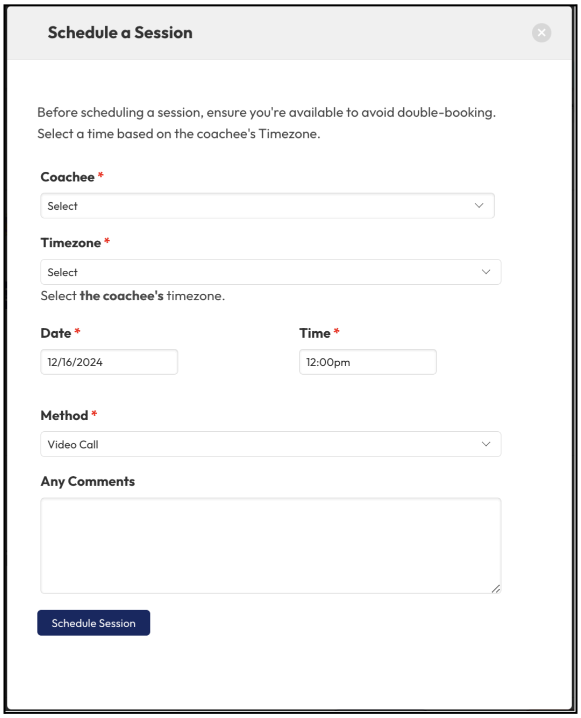
Your homepage houses all your day-to-day information and functions. You can easily schedule sessions, escalate a coachee, and send a feedback survey.

You will also see a summary of your daily and upcoming sessions and can view these in list or calendar format. You can reschedule and cancel sessions from here. If you select “view” then “edit session” will allow you to complete notes (see sessions page instructions).



Finally, you can navigate to your coachees, sessions, and settings as well as log out using the tabs in the upper right corner.





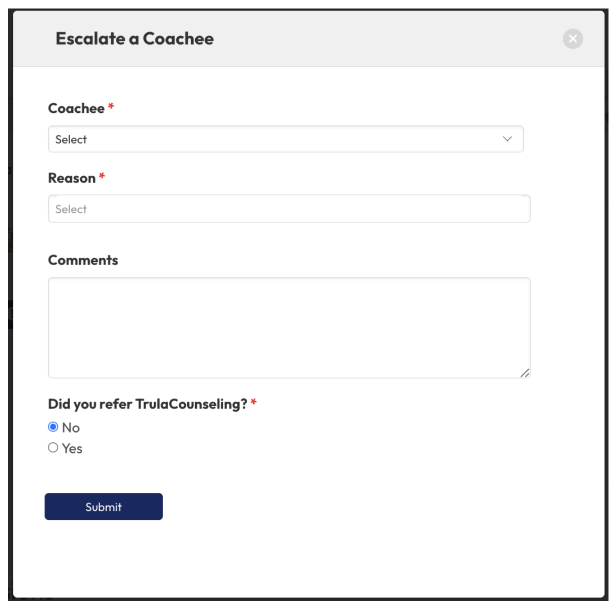
Scheduling a session:

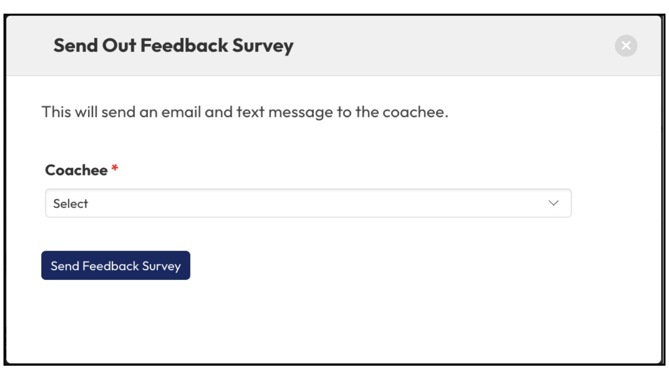
Once a coachee signs up, you can schedule sessions with them from the homepage. When you click "schedule a session," the following box will appear.

The drop down menus allow you to easily select your coachee, the coachee's timezone, and the session method (video or phone).
The "any comments" box provides a space to include relevant information regarding the session (ex: remember to check in about [x goal] with coachee). Notes: this is **not** the same as writing notes for your session.
IMPORTANT: You must schedule the session time based on the coachee's timezone, not your timezone. The coachee's timezone will appear in the text you receive when the coachee signs up. You can also find their timezone in their coachee profile.

Escalating a coachee:

You will escalate a coachee if they share the following during your sessions: experiencing suicidal ideation, experiencing sexual assault or abuse, experiencing severe anxiety or depression, or iif they are aware of abuse of a minor. These are found in the "reason" drop down menu and you can add additional description of the situation in the "comments box." Once you click submit, Alexis and Tasha will receive a message and will take things from there. You do not need to do anything else after submitting.





Sending the feedback survey:

You can easily send the feedback survey from the homepage. Select the coachee from the dropdown menu and click "send feedback survey." You are responsible for sending the feedback survey to your coachees.

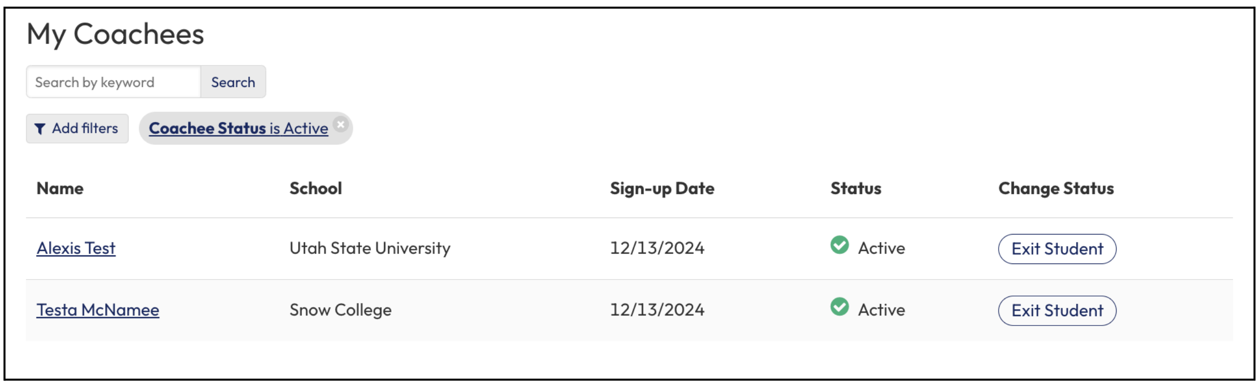
Homepage reminders:

The homepage will also show you reminders about things like missing notes. These will appear as a banner across the top of your page.

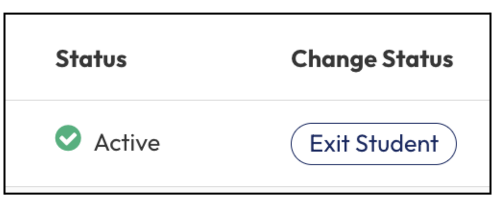
My Coachees Page

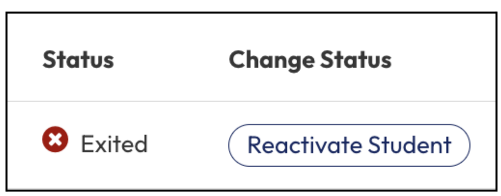
Coachees tab:

You can navigate to the “my coachees page” from the homepage. You will find a list of your coachees with their name, school, sign-up date, and coaching status (active or exited).

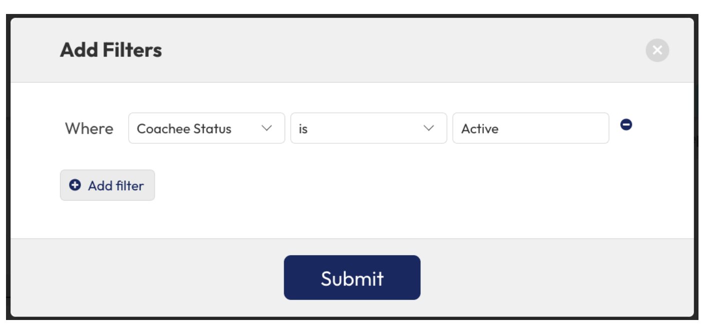


You can also click “exit student” when they finish coaching or “reactivate student” if they want to return to coaching.





You can use the search box to quickly find a coachee by name. You can also filter your coachees based on a number of criteria, such as active or exited, school, signup date, etc.



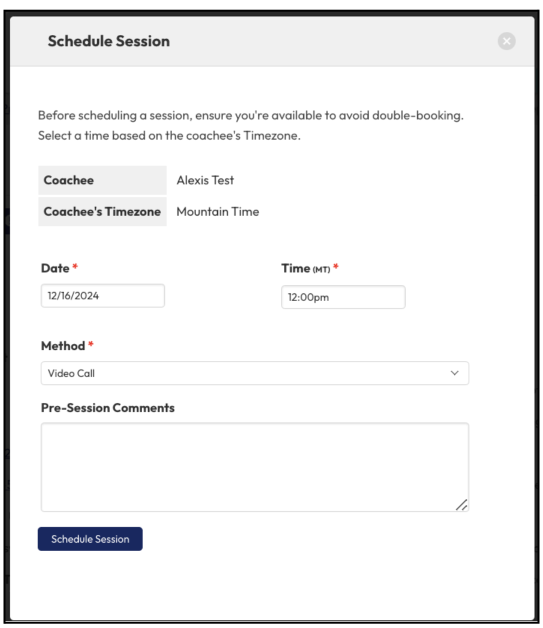
Coachee profile:

If you select a coachee by clicking on their name, it will take you to their coachee profile. From here, you can do a number of things. First, you can navigate the coachee's profile or session information. The profile page shows the coachee's information including things like demographics, contact details, coaching preferences, etc.

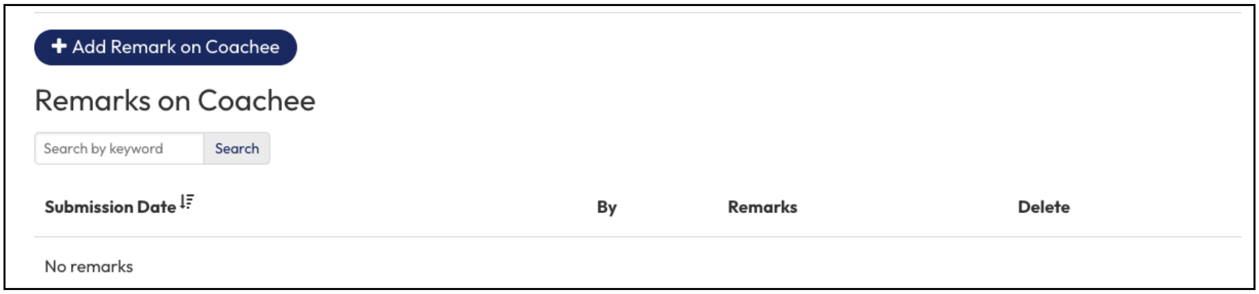
****IMPORTANT: You can find the coachee's timezone in their profile. Remember you must schedule sessions based on the coachee's timezone.****

You can schedule sessions, escalate a coachee, exit a coachee, or send the feedback survey from their profile.

Selecting these from the coachee profile looks slightly different from the homepage. Some information will populate when performing functions from the coachee profile. Notably, the window for scheduling sessions will populate the coachee's name and timezone. The other options will populate the coachee's name and all other details are the same as the accessing it from the homepage.

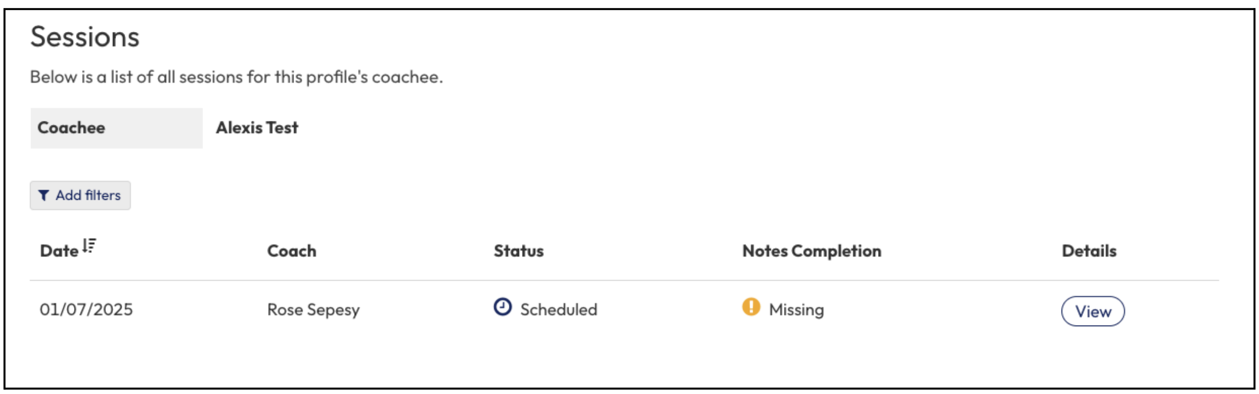


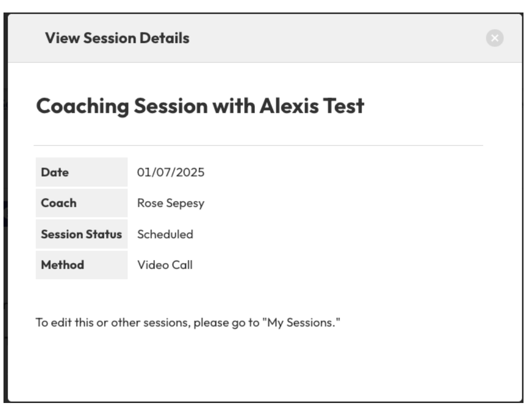
You can add remarks about your coachee at the bottom of the profile page. Remarks are relevant pieces of information about the coachee that you would like to remember but are not useful to include in session notes.



Coachee sessions:

Here you will see a list of all the coachees sessions, both past and upcoming. You can add filters to search for different date ranges. Notice the categories “status” and “notes completion.” These will change when you have completed all information for a completed session. This is a place you can check to find any missing notes.

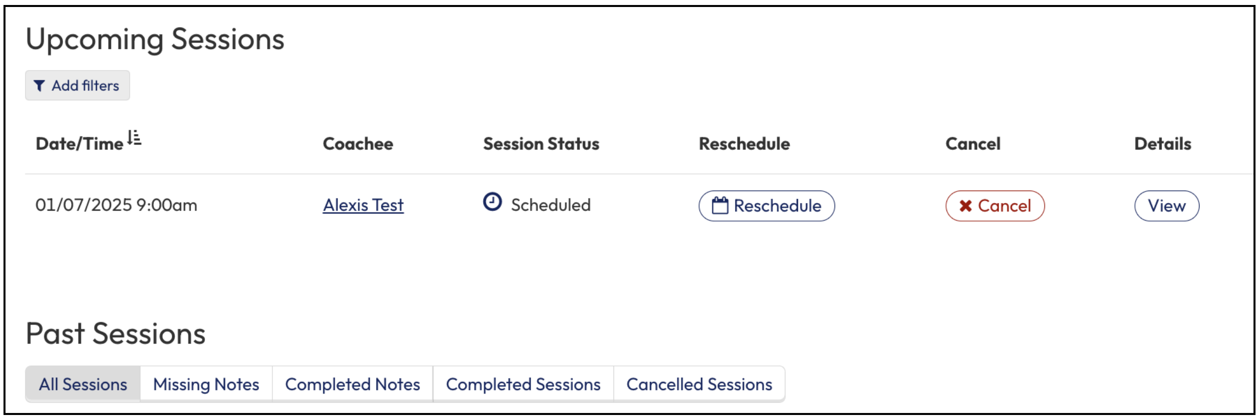




My Sessions Page

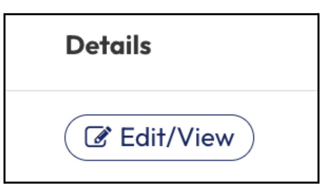
Upcoming and past sessions:

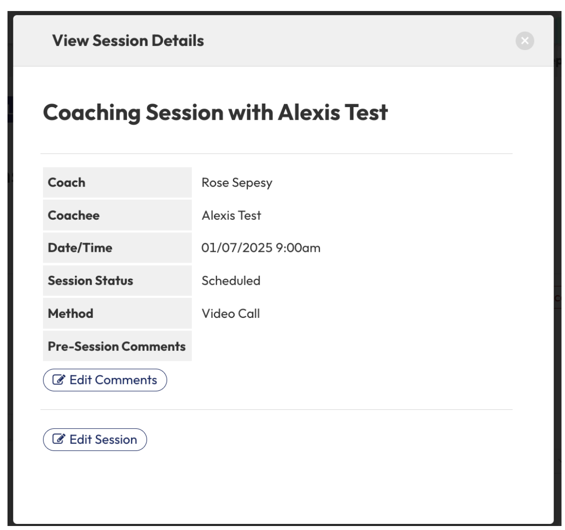
The my sessions tab will show you all of your past and upcoming sessions. Like in other tabs, you can add filters to sort your upcoming sessions. You can also reschedule cancel from here. For past sessions, you can sort for things such as missing notes, completed sessions, etc. using the tabs under "past sessions."



Completing sessions and adding notes:

Under past sessions, select edit/view under details, then select edit sessions.





This will take you to the window to complete your notes. You will find prompts for the notes format with examples to help you write quality notes.

Coachee's Overall Goal

Example: They want to run a marathon, which may take several sessions *

Coachee's Agenda for This Session

Example: They want to create a plan to find running shoes, what they can do during this time together, and what they want to take away from this session *

Action Steps

List the specific action steps the coachee set. (Example: They will research shoes and purchase them) *

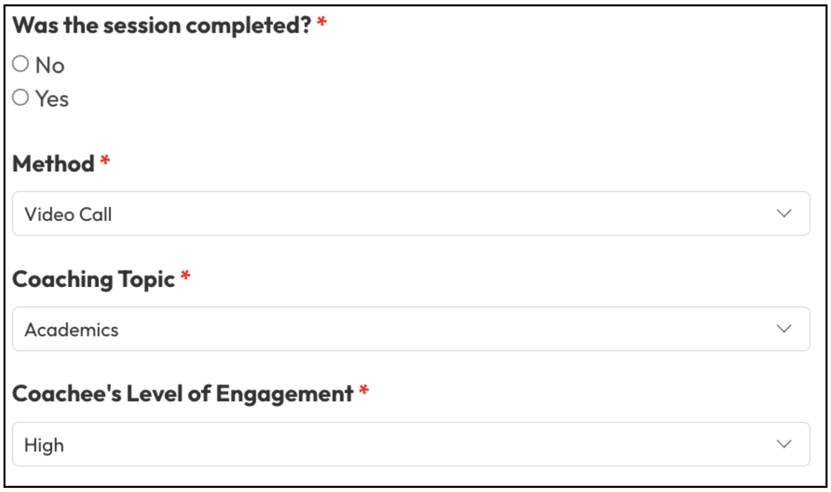
Self-Reflection

Reflect on what you learned about yourself in the session

Other Session Notes

You will also complete relevant information such as the session method, coaching topic, and coachee engagement.

IMPORTANT: You are responsible for checking "yes" under "when the session was completed?" This will send the coachee their completion certificate. Certificates will not send unless this is checked. You are responsible for making sure the certificate sends by selecting that the session is completed.



Was the session completed? *

○ No
○ Yes

Method *

Video Call

Coaching Topic *

Academics

Coachee's Level of Engagement *

High

There is an area to write about potential “red flags” regarding the coachee/session. This can be anything that concerns you about the coachee or session that is not severe enough for an escalation.

If you send/use resources during a session, you can record the number used here. You can also add additional remarks that will save to the coachee’s profile. Remember to hit save and your notes for the session are complete.

Potential Red Flags

How many resources did you use or send during the session?

Example: Wellness Wheel, VIA Assessment, Smart Goals Worksheet, Podcasts, etc. *

0

☐ Add Remarks on Coachee

Save

__**Schedule or log session:**__

Like in other tabs, you can schedule a session from the sessions page. **Remember to scedule based on the coachee’s timezone. The timezone will not populate form the sessions page.**

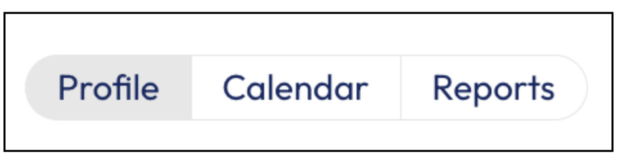
You will also see the option “Log In Session.” **This is only to record sessions that you had that you did not schedule before the session occurred.** Ideally, you will not need to use this, but be aware of the option.

Settings Page and Account Settings

Profile:

Clicking on the settings page will take you to your profile. This is where you can change any of your information that you were prompted to complete when setting up your account. There is some information such as phone number and birthdate that you will see on this page but will not show in your public profile (the one the coachees see). You can check the coachee view of your profile by selecting “view public profile.”

You can also check your calendar and view your coaching data on the settings page using the tabs at the top of your page.



Calendar:

You can check things like your timezone, zoom link, and coachee/session limit here. This is also where you can request time off. **You must request time off if you plan to not coach during your normal availability.** The request will go to Alexis to be approved/denied. Please note that requests for time off can be denied.

Request Time Off

Dates *

12/16/2024 to 12/16/2024

Reason *

Submit

Calendar Settings

Acuity Calendar ID

This is your personal Calendar Link retrieved from **Acuity Scheduling.**

6334372

Timezone

Select **your** timezone.

Mountain Time

Zoom Link

This is your personal Zoom Link retrieved from your Zoom account. *

https://zoom.us/j/9577681426?pwd=cldFdnVTK3NoTFpFWGZhY1lyWitEQT09

Active Coachees Limit

4

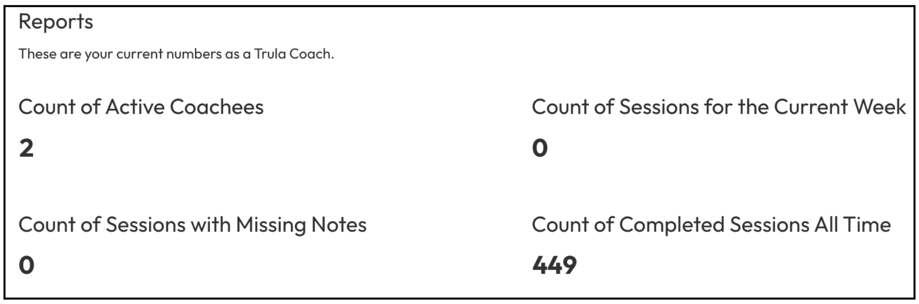
Weekly Session Limit

4

Save

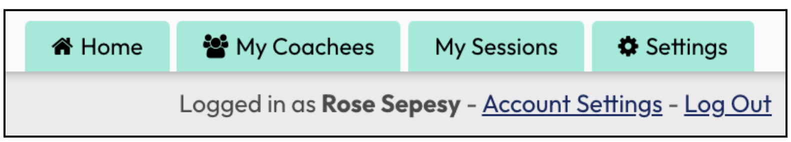
Reports:

The reports tab will give a summary of your coaching data. You can see your number of active coachees, number of missing notes, number of sessions for the current week, and number of completed sessions for your entire time with Trula.



Account settings:

The account settings tab is underneath the main navigation tabs for the (my sessions, my coachees, etc.).



This is where you can change the name and email associated with your account and your password. After you set up your account for the first time, make sure you create a new, strong password.