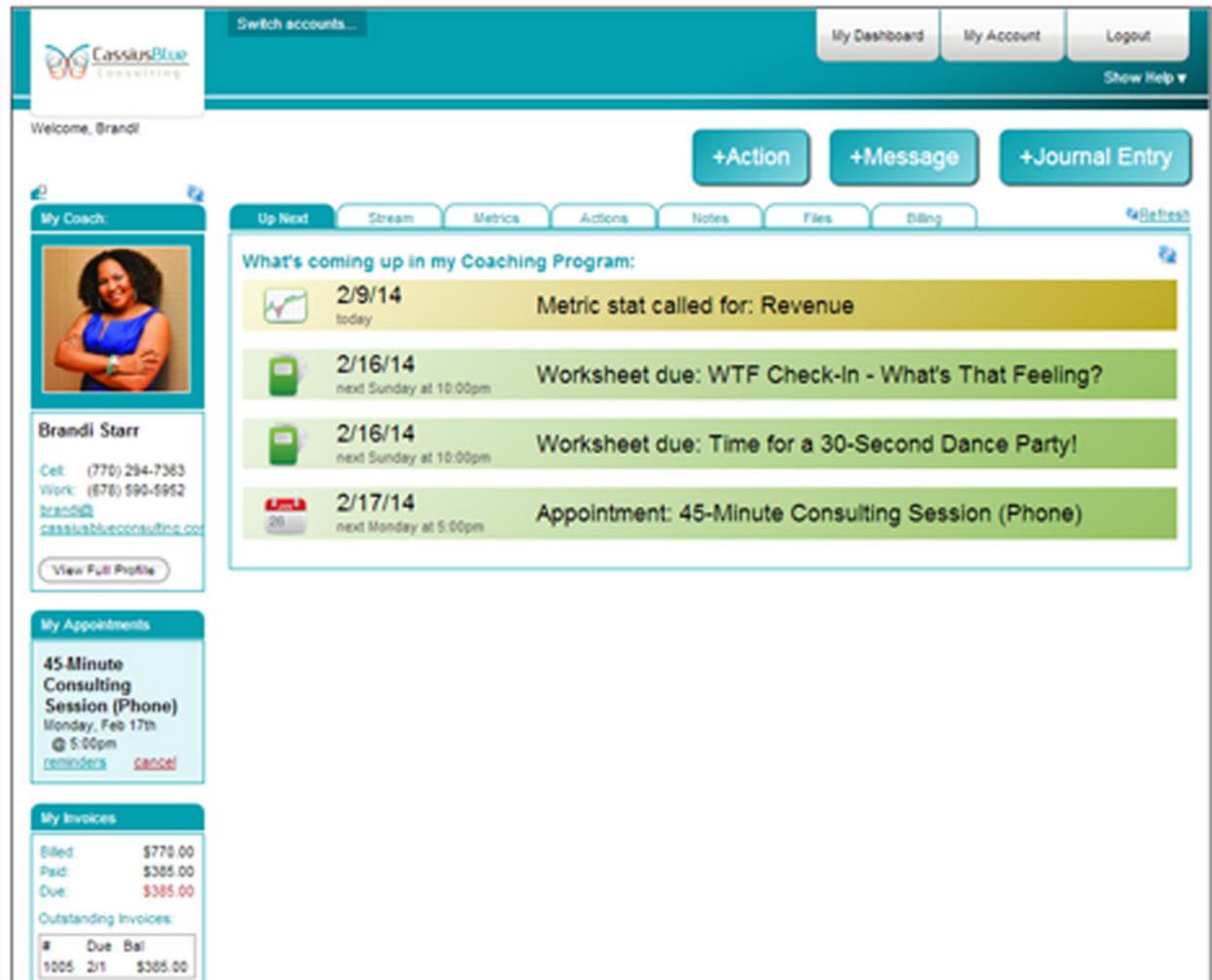


# The Kaleidoscope Corner

Interactive workspace that offers additional structure and accountability to your coaching/consulting program



Switch accounts... My Dashboard My Account Logout Show Help ▼

Welcome, Brandi!

+Action +Message +Journal Entry

Up Next Stream Metrics Actions Notes Files Billing Refresh

What's coming up in my Coaching Program:

- 2/9/14 today Metric stat called for: Revenue
- 2/16/14 next Sunday at 10:00pm Worksheet due: WTF Check-In - What's That Feeling?
- 2/16/14 next Sunday at 10:00pm Worksheet due: Time for a 30-Second Dance Party!
- 2/17/14 next Monday at 5:00pm Appointment: 45-Minute Consulting Session (Phone)

**My Coach:**



**Brandi Starr**  
Cell: (770) 294-7363  
Work: (678) 590-5952  
[brandi@cassiusblueconsulting.com](mailto:brandi@cassiusblueconsulting.com)  
[cassiusblueconsulting.com](http://cassiusblueconsulting.com)  
[View Full Profile](#)

**My Appointments**

**45 Minute Consulting Session (Phone)**  
Monday, Feb 17th  
@ 5:00pm  
[reminders](#) [cancel](#)

**My Invoices**

Billed:	\$770.00
Paid:	\$385.00
Due:	\$385.00

Outstanding Invoices:

#	Due	Bal
1005	2/1	\$385.00

Get totally engaged in the process of being coached, follow through on your big plans like a pro, and achieve the results you seek.

# Introduction

*By Brandi Starr; President, Brand Strategist, and Speaker*



Hello!

I'm excited that you have chosen Cassius Blue Consulting to help you transform your business. I welcome you, and I want to open with a small thank you. By choosing to be supported in your growth, you are making the small business community a better place, and for that I appreciate you.

I've written this guide to introduce you to The Kaleidoscope Corner, the online system we will be using to support our coaching/consulting relationship.

Here we have 26 pages to wade through, but never fear.

I recommend that you first click around your Kaleidoscope Corner client account to get a sense for what's being talked about here. Perhaps create an Action or two and maybe even set up a Metric, and *then* come back to this manual. After a few minutes of playing around you should feel right at home with what's discussed in the pages to follow.

Brandi Starr

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## How to Use this Manual

This guide is broken into two parts:

**Motivation** and **Mechanics**.

**Motivation** covers the **why** of using The Kaleidoscope Corner's tools, including the reasoning, mind-set, and practices that will enable you to get the most out of being coached, and is divided into a series of essays which you can visit in any order.

It should work well for you to pick one that sounds most interesting from the table of contents below, and then jump around as your curiosity takes you from there.

**Mechanics** goes into details of **how** to configure and use the tools, and reads (slightly) more like a nitty-gritty technical manual by taking you through the main features of The Kaleidoscope Corner one by one. You can click into whichever feature you feel you could use help with, and it might be that you may end up skipping the whole thing entirely. I'm okay with this.

## Introduction: Why Software At All?

I'm delighted you asked. One of the key benefits of coaching/consulting is having you stretch and challenge yourself in ways that are not yet natural to you. You'll be regularly getting new insights, ideas and clarity from your program, and then regularly putting that new stuff into action. Commonly there will be creating an action plan, and then following through on it, and then reviewing how it went.

Now then, by default all these insights, actions,

and things to follow through on comprise quite the collection of information for you to keep track of. (We know this because NOT keeping track of these things means insights fade, actions get forgotten or confused, and follow through just doesn't happen. Sound at all familiar?)

Managing this information becomes doubly difficult when you consider the importance of keeping me in the loop about how things are going (important because knowing how things are going is one of the keys to effectively guiding you).

This is the crux of why software: The Kaleidoscope Corner is going to serve our relationship as the way to capture the insights, record the action plans, assist you in the follow through, and let me see how things are going.

In the rest of this manual you're going to learn how even as little as 10 minutes spent setting up The Kaleidoscope Corner is all it takes to be properly supported as you take the next steps in your coaching program and achieving real results in your life and business.

By supported, I mean:

- Wisdom from our sessions will be recorded and available for easy reference later.
- Your actions will be clearly planned and unambiguously ready to be carried out.
- Your goals will be set up and ripe for regular tracking with minimal effort.
- Reminders will be in place to keep you moving forward as the days go by.

With the aid of The Kaleidoscope Corner your progress will be more rapid, your results more tangible, and your experience more fun.

# Keep it Green

Compare these two sets of actions:

August	August
Set up "difficulty levels", hints, and behavior tracking/variation Done over 3 weeks ago (8/14) at 8:26am	Set up "difficulty levels", hints, and behavior tracking/variation Done over 3 weeks ago (8/14) at 8:26am
Upload a triumphant screenshot of the Week 1 work in progress Done over 3 weeks ago (8/14) at 8:26am	Play for 30 minutes with trueDAT for an intro to SQL Done over 3 weeks ago (8/14) at 8:26am
Write up what got done and how it went for your week 1 progress Done over 3 weeks ago (8/14) at 8:26am	Link everything together through events & do some QA Done over 3 weeks ago (8/14) at 8:26am
Link everything together through events & do some QA Done over 3 weeks ago (8/14) at 8:26am	Write up what got done and how it went for your week 1 progress Done over 3 weeks ago (8/14) at 8:26am
Set the stage by filling out objects and display elements Done over 3 weeks ago (8/14) at 8:26am	Create 3 Actions of programming bits to complete this week on the app Done over 3 weeks ago (8/14) at 8:26am
Write complete outline of app w/ comments Done over 3 weeks ago (8/14) at 8:26am	Upload a triumphant screenshot of the Week 1 work in progress Done over 3 weeks ago (8/14) at 8:26am
Play for 30 minutes with trueDAT for an intro to SQL Done over 3 weeks ago (8/14) at 8:26am	Read Paul Graham's essay on great programmers Done over 3 weeks ago (8/14) at 8:26am
Create 3 Actions of programming bits to complete this week on the app Done over 3 weeks ago (8/14) at 8:26am	As a Journal Entry write up your 4 weeks of milestones Done over 3 weeks ago (8/14) at 8:26am
As a Journal Entry write up your 4 weeks of milestones Done over 3 weeks ago (8/14) at 8:26am	Set the stage by filling out objects and display elements Done over 3 weeks ago (8/14) at 8:26am
Outline a super basic set of features that you might cook up for your company's... Done over 3 weeks ago (8/14) at 8:26am	Outline a super basic set of features that you might cook up for your company's... Done over 3 weeks ago (8/14) at 8:26am
Take an hour to surf Hacker News Done over 3 weeks ago (8/14) at 8:26am	Write complete outline of app w/ comments Done over 3 weeks ago (8/14) at 8:26am
Read Paul Graham's essay on great programmers Done over 3 weeks ago (8/14) at 8:26am	Take an hour to surf Hacker News Done over 3 weeks ago (8/14) at 8:26am

The one on the left is (and I hope you'll agree) rather a bit nicer to look at. It's like looking at a report card with straight A's rather than one containing letters from all over the (early) alphabet.

I invite you to consider the mind set that, if your Actions tab looks like the one on the right, *you are doing it wrong*. And NOT in the sense of "You're a bad person because you're regularly late in getting things done". No. You will do as you do and that's okay--coaching is meant to stretch you so acting on it is often going to be a challenge.

Instead, what I mean when I say you are doing it wrong is that you're using Actions in a way that is *not serving you as well as it could*.

So what does it mean to have Actions serve you as well as they could? Simply this: keep it green.

Green means on time. Deadlines pass with actions uncompleted, yes, but slipping into lateness means a certain degree of being asleep at the wheel. Instead of allowing that to happen (which, over time, creates a nasty sensation in at least some parts of your brain that "following through on my actions doesn't matter" and/or "I suck at getting things done"), adopt for yourself a policy that you keep your

Actions in the green.

How? Well I'm not going to say by simply doing all your actions on time\*. In reality distractions come up, things change or reveal themselves to be more difficult, and so forth. So let us not pretend they don't.

Here's what you CAN do:

- **Set reminders.** Don't let deadlines just slip by your awareness, know about what's coming up with reminders.\*\*
- **Re-promise as needed.** A due date for an Action is more or less you making a promise, that *I will complete such-and-such by this date*. It's Tuesday and you have an action due Friday that you know you're not going to be able to finish? Pop in and change the due date to something you can stand behind. Timely reminders will help you to call this sort of audible as early as possible. And I promise you: the experience of doing this well BEFORE a due date has passed is very different from doing it after. It's like rescheduling a meeting with someone 2 days before versus 2 hours after it was supposed to start.
- **Re-tune the level of your ambitions.** A lot of red and yellow in your action plan is a healthy hint that *maybe* you are regularly biting off more than you can chew. "But isn't it good to be ambitiously taking on more things?" Ostensibly, yes. But it turns out that as you over-promise and under-deliver,

\* Because that boils down to wagging a finger at you and saying "just be a better person", and if **that** worked, all of coaching would be way easy and we could all go home.

\*\* For more on how to set them effectively, see "Timely Reminders and the Boy Who Cried Wolf" later in this manual.

you gradually chip away at your sense of effectiveness at accomplishing things, and nothing kills productivity in a given moment quite like knowing yourself as a worthless slouch. Re-tuning your ambitions amounts to making more responsible promises regarding what you'll do. Maybe you make fewer actions and maybe you give yourself more generous deadlines.

Taken together, these 3 strategies should enable you to always be on time with your action plans.

Finally I'd like to point out that yes, you *could* make actions with super far out due dates, or push due dates back after the fact, or mark actions complete earlier than they were actually done, all just to be on time.

But take this seriously for your own benefit, **don't do it to impress The Kaleidoscope Corner**. Just having a sea of green on your Action tab isn't what matters. What matters is the process of responsible follow through which got you there.

## To Cancel or Delete?

When it comes to Actions that you're just not going to do, The Kaleidoscope Corner gives you two options: canceling or deleting.\*

Cancel this Action

Delete this Action



Make a plan you intend to actually fulfill on and take your due dates seriously.

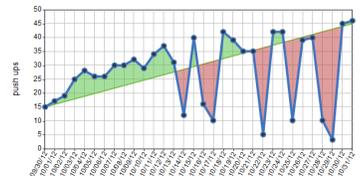
When it's an Action you just created and suddenly realize something like "wait, that's not the right thing to do right now", then deleting it is fine. Chalk it up to essentially being a typo, no need to have that clutter your history of actions.

But when it's an Action you've had around for a while, one which you seriously intended to do but now things have somehow changed? It's probably better to cancel it, and even better to leave a little comment about why. Doing so has your actions history tell a more complete story about what's working and what's not.

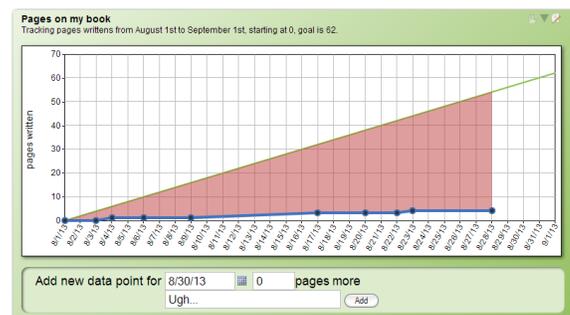
## Beware the Red Triangle of Despair

You may already know this, but Metrics have a handy way of illustrating how things are going relative to a target. If you're on the happy side of the target value, the area which separates target from actual is shaded a happy green.

Likewise, if reality is falling short of the desired outcome, the difference is shaded in red.



Now then, sometimes you have an aim to build towards some goal in a cumulative fashion over time, yet no progress is being made. Your metric is apt to look something more like this:



I call this the “Red Triangle of Despair” because every day that goes by with no forward progress makes the gap between reality and goal wider, often leading sooner or later to a downward spiral called “Ugh, this is hopeless so why even try.”

Here there is an instance where setting a goal is counterproductive, it would actually be better to have not setup a Metric at all. When you start to see a red triangle being gradually built up over time, take time out to examine the situation.

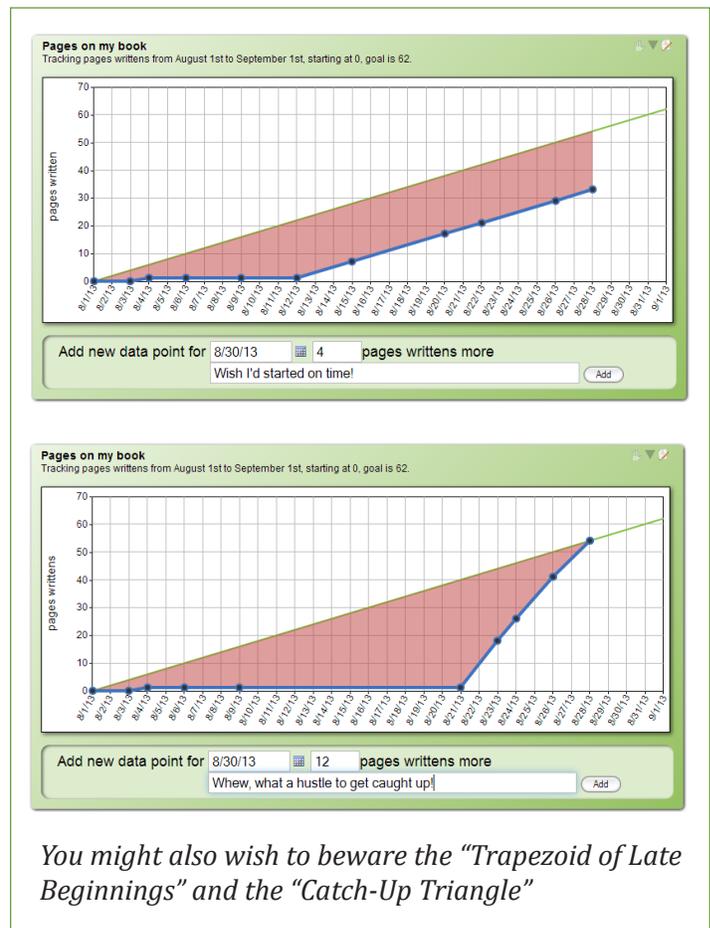
Chances are one of three things will be the case:

- **The goal is realistic but there are no actions in place to make it happen.** Let’s work together to plan out actions that will get you back on track, and then take those actions seriously.
- **The goal is actually pie-in-the-sky given how things are right now.** That’s okay; just recognize that you made it up so you can always make up something else. Revisit your expectations and come up with a target that is more in line with reality, something that gives you a game at which you have a fighting chance.

- **The goal is realistic to catch up to but only after something else happens.** Call it Magic Turning Point X (for example sales, and X is you getting the marketing materials together in order to properly tout what you’re selling). In this case make the Metric begin only after X occurs, so that you don’t have this looming goal putting undue pressure on getting X right. And perhaps, assuming X is something you control or are working towards, you create a metric called “Progress towards X happening” measured as percentage points from 0 to 100. This again gets your focus on playing a game that you can make immediate progress

towards.

If you’re facing a Red Triangle of Despair, look for yourself to see if one of these situations applies to you, and then let’s work together to remix the situation into a more empowering one.



## Timely Reminders and the Boy Who Cried Wolf

One of the most powerful tools you have at your fingertips is the ability to set reminders for yourself. This is the opportunity to take your destiny into your own hands during the days *between* coaching sessions. Together we will create action plans to work on until we talk next, and setting reminders for yourself is how you say “Yes: the ball is in my court and I’m going to ensure I get these items handled.”

As you are no doubt aware, life comes up and inspiration fades. These are but two reasons why you might lose track of your action plan, the doing of which generally represents going above and beyond the usual to stretch and grow yourself. So set timely reminders as a way to keep what is important to you in your attention.

By “timely reminders” I mean reminders that you’ll receive at a time when you can *act on them*. Say there’s a little 3 hour project for you to finish before you talk we talk next Tuesday. You could push it until Tuesday, but you’d like to have it done over the weekend, when you’ve got time to work on it. Sunday would be a good day for it.

So make it due on Sunday at, say, 8pm. Then set reminders for 2 days before (i.e. Friday at 8pm, to remind you to keep some time free this weekend), and another 12 hours before (i.e. Sunday morning, reminding you to take time today and get it done by this evening). Compare these reminder times with, say, 3 days before and 1 hour before. At 3 days before the due date it’s Thursday night, when you’re not yet planning to work on it and you’re more liable to forget again before the weekend. At

1 hour before it’s probably too late if it’s not started already.

This is the little strategy to setting due dates and reminders: aim to have The Kaleidoscope Corner give you a little tap on the shoulder at times when it is most useful to you in the moment.

The worst thing you can do with reminders is have them arrive at a time when your immediate reaction is something along the lines of “Yeah, yeah, but I can’t do anything about that *now*.” Then the reminder system becomes a nag without providing any benefit. Skip through enough messages like that, and before you know it, like the boy who cried wolf, The Kaleidoscope Corner reminders and alerts will become extra noise to filter out, meaning you’ll ignore them when they would otherwise be genuinely useful.

## Emotionally Invested

You would be surprised what taking a little time on your own will do to up your emotional investment.

Emotional investment in what? **In your own personal success and results.**

Though super counter-intuitive, you being emotionally invested in your own success is NOT automatic and thus NOT to be taken for granted. Sure, it’s your own success, and



Set reminders for yourself such that they count, and they’ll live for you as handy godsend which nudge you to your own personal greatness.

so what could be finer insofar as you are concerned, right? But it turns out that a vision and action plan for your triumph generally start out, by default, in the “Hey yeah, I guess that would be nice” realm, which is, in fact, a far jaunt from the “YES, I want this and I am going to make space in my life to pursue it” realm.

More often than not, you will be attuned to a vision for elevated awesome in your life immediately following our coaching sessions. That’s one my main purposes: to get you aware of (and excited for) what could be, and clear how to move forward. But remember--until you begin to genuinely run with that sparkling vision in earnest, it will live in the “I guess that would be nice” realm.

So take a little time to get yourself emotionally invested. Fresh off of a coaching call wherein you’ve devised an approach to work at for the coming week? Then strike while the iron is hot: take a 5 minute time-out to write up your thoughts about the plan, any concerns you might have, what fulfilling on it would mean, and how you’re going to go about doing so. The act of you doing this creates in you an emotional investment, one that will see you through to fulfillment. Do this as a Journal Entry to have it automatically shared with me, further enabling me to support you.

### Write a Journal Entry

Title: Reflecting on Product Creation

It's strange to think that in my very beginner state as a web programmer that I might actually come up with a product that I could sell. Still, this is a very enticing thing for a number of reasons:

1. My network is pretty limited for getting freelance gigs
2. Having a project that I can be really passionate about and evolve for the long haul sounds great
3. Selling a product scales much better than selling my hours

In my last 3 years in the non-profit world I've seen tons of inefficiencies and pain points that would actually be pretty easy to solve with software. I'll take two hours this weekend to list those out, and go from there. I'm excited to think I might fast-track this whole process.

Make this entry private, for my eyes only

Save Cancel

## Make Observations in the Laboratory of Your Own Success

A lot of the work you will do in your process of being coached will amount to exerting effort and noting the results. With a Metric or two you’ll be able to track how things are going over time, for they will cause you to specifically measure the results you get on a regular basis.

Here’s the thing: it’s not just about the numbers. In the moment you’re recording a number, you have, fresh in your head, the story behind that number. Whether you had a great week, a rough one, or anything in between you know in that moment the “why” behind it: what really worked, where you got stuck, or even the details pertaining to your mood and motivation.

Add new data point for 8/31/13 12 pages written more

Getting out to the coffee shop for an away game really worked! Add

It may seem trivial to do so, but take a moment to observe what led to the result. It might be clear as can be in a given instant, or it might take some 30 seconds of introspection. Either way be sure you have some nugget, a one- or two-sentence blurb, which tells the story of your progress at this particular step. Then add that bulb as a comment about that result as you report it.

The magic of doing this isn’t in the moment (though it can be, if that pause for insight leads you to a deeper awareness of what’s working or what’s not). Rather it’s in the story that gets built up over time.

What's fresh on your brain in the moment won't be two months from now, and being able to look back over a series of observations paired with your numbers will reveal patterns which give way to insights:

- One-time flukes of success can be turned into repeatable processes.
- Common pitfalls can be turned into predictable things made easy to avoid.
- Ultimately, what you're capable of and how to accomplish it comes into focus.

Even if you don't consider yourself much of a scientist, every day that you record a progress point counts as another experiment in personal accomplishment. Make observations and, with my help, learn from your accumulated awareness.

## Sow the Seeds of Conversation

Throughout our coaching relationship, we are going to talk on regular basis, right? Those conversations are your chance to get focused insight and expertise about what you're up to, so you may as well get as much out of them as you can.

By posting comments and journal entries, you can clarify your wants in coaching in a number of ways. The following make great fodder for coaching conversations:



Add comments with your Metric data points. Doing so will provide immensely valuable insight as your progress unfolds.

- Areas in which you are struggling
- Questions regarding things you wish to learn more about
- Ideas which you are curious about exploring

So as you go through your days prior to our next coaching call, leave the occasional comment or write the occasional journal entry about things that matter to you I may be able to help with.

By giving me a little window into what you're working on or are interested in, you sow the seeds for a great next conversation, one in which you'll be able to dive right into the things you care about most.

## Wonder Out Loud

One of the best kinds of remark to share with me are musings about what might be. Remarks that begin with "What if I..." and "It would be amazing if..." and "I'm curious about trying..." all tend to spark inspired explorations and lead to worthy new approaches.

I'm listening for your ambitions, so make them heard. By doing so I am able to better guide you in getting there.

## Self Direction

Sooner or later you may find yourself in a place where you could actually come to our session with your own action plan already made up. Why would you do that?

If one of the key aspects of coaching is coming up with action plans, then similarly fundamental is a deep dive into the tactical side of those plans. Once you get to this point if you

come prepared with an action plan already laid out, there's more time for me to help you refine your approach, work out ways to overcome barriers, and lend insight on how to execute for maximum win (remember, I'm not here to teach you what you already know).

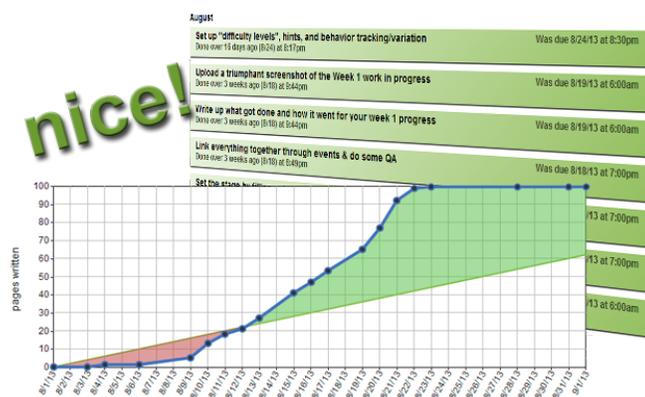
So if you have even a hunch of what to tackle in order to keep moving forward, put in an Action or two. It'll set you up for even more focused guidance.

## Just Plain Showing Off

The Kaleidoscope Corner makes your performance, follow through, and results super visible to me (and to you!).

At some point, you might find yourself delighting in having an action plan color coded in all green, Metrics that are all on track with worthy targets, and being generally on top of things while driving further accomplishment.

Let us call this "showing off" for short.



When your performance is there to see by someone who is not you, showing off becomes possible. In the context of your decidedly supportive coaching relationship (wherein your success is of primary importance), showing off is completely appropriate and even most welcome.

So feel free to do it. Impress me! And not for the sake of impressing me, but because of what it means for YOU. Because when you impress me, something is going VERY, VERY right in the pursuit of your own goals.

## If You Don't Record it, it [Almost] Didn't Happen

Between Actions for the things you complete and Metrics for the results you obtain, The Kaleidoscope Corner documents the lion's share of what you accomplish within our coaching relationship. I invite you to consider that recording as much (i.e. marking Actions complete and regularly reporting your Metric numbers) is a vital part of such accomplishment happening at all, and this is for 3 reasons.

**First**, keeping the state of what's-so up to date within The Kaleidoscope Corner makes it possible for me to keep up with your progress on a regular basis. This allows me to give you better and timelier feedback and support, including well-deserved congratulations now and again.

**Second**, recording these things is great for your own personal satisfaction and clarity. Marking an Action done lets you put it to rest in your brain, making more space for what's next. Reporting a Metric number makes the result real and official, giving you a moment to celebrate the win and/or ponder how to improve for next time.



The further you can take yourself on your own, the further you can get with my support.

**Third**, you're creating a record for the ages. This might not be obvious beforehand, but I promise you that having records of your completions and results is not only delightful, but downright useful as well. A concise, easy-to-review account of what you've gotten accomplished during a weeks--or even months--long span of time serves as powerful & compelling evidence for your effectiveness. Few things will convince you how far you can go quite like seeing how far you've come.

When you make a record of an accomplishment or a result, it takes on a certain realness. Otherwise it likely fades from memory, into the oblivion of just a bunch of stuff that happened months (or years) ago.

## Document Your Successes

When something really worked, take a moment to journal about it. As journal entries are shared with me, this is your chance to brag to your audience of one. A brief note about the win, written for me to read, will help you crystallize your thoughts regarding your success. You'll be surprised how often doing this reveals insights about what you could do again to enjoy repeated successes.

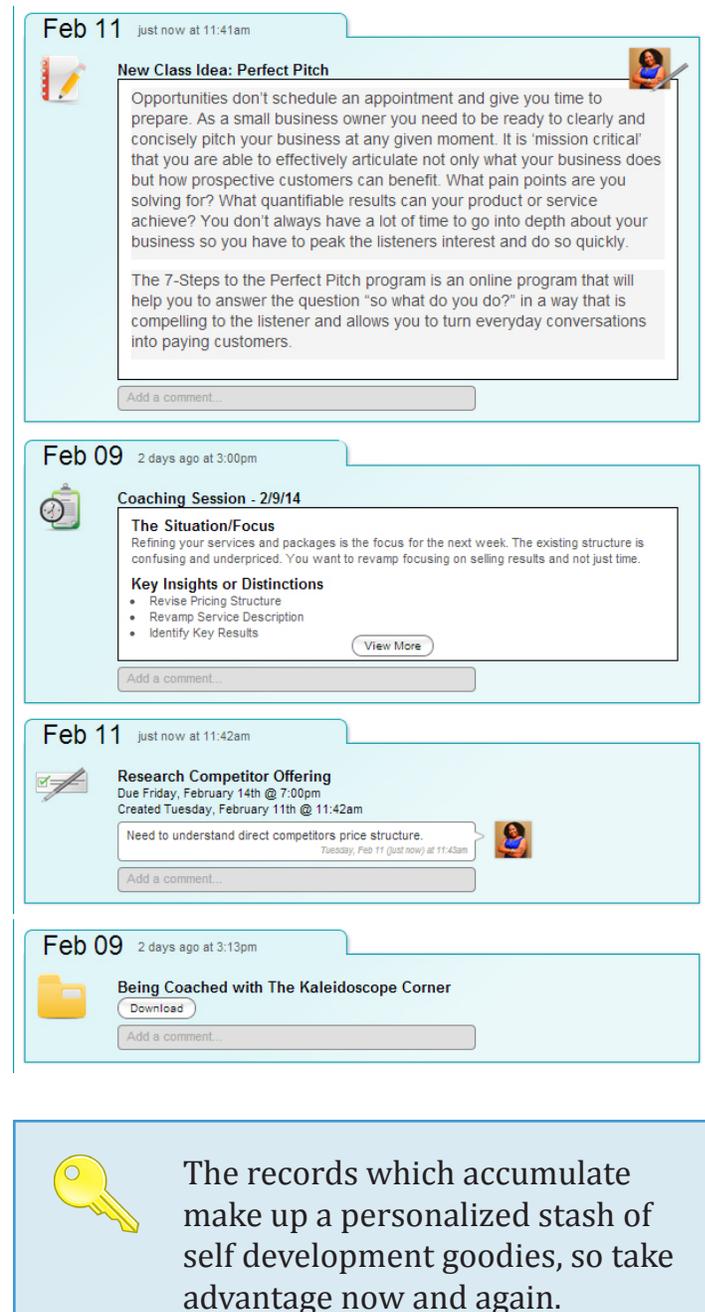
## Inspiration at Your Fingertips

As we continue to work together within The Kaleidoscope Corner, an ever growing trove of wisdom and insights will gradually emerge, one that is tailored JUST FOR YOU.

Session notes, comments, and other forms of feedback all constitute nuggets of wisdom handed down from your coach, and captured

for you to review at any time. Take advantage of this. Once documented, the inspiration and clarity you get by the end of a typical coaching call is yours to revisit.

When you're stuck or could otherwise use some of that good stuff, the answer may lie in simply reviewing the notes from earlier work. That way, our coaching relationship can build upon itself at an ever quickening pace, allowing you to grow and take on ever bigger things.



**Feb 11** just now at 11:41am

**New Class Idea: Perfect Pitch**

Opportunities don't schedule an appointment and give you time to prepare. As a small business owner you need to be ready to clearly and concisely pitch your business at any given moment. It is 'mission critical' that you are able to effectively articulate not only what your business does but how prospective customers can benefit. What pain points are you solving for? What quantifiable results can your product or service achieve? You don't always have a lot of time to go into depth about your business so you have to peak the listeners interest and do so quickly.

The 7-Steps to the Perfect Pitch program is an online program that will help you to answer the question "so what do you do?" in a way that is compelling to the listener and allows you to turn everyday conversations into paying customers.

Add a comment...

---

**Feb 09** 2 days ago at 3:00pm

**Coaching Session - 2/9/14**

**The Situation/Focus**  
Refining your services and packages is the focus for the next week. The existing structure is confusing and underpriced. You want to revamp focusing on selling results and not just time.

**Key Insights or Distinctions**

- Revise Pricing Structure
- Revamp Service Description
- Identify Key Results

[View More](#)

Add a comment...

---

**Feb 11** just now at 11:42am

**Research Competitor Offering**  
Due Friday, February 14th @ 7:00pm  
Created Tuesday, February 11th @ 11:42am

Need to understand direct competitors price structure.  
Tuesday, Feb 11 (just now) at 11:43am

Add a comment...

---

**Feb 09** 2 days ago at 3:13pm

**Being Coached with The Kaleidoscope Corner**

[Download](#)

Add a comment...

---

 The records which accumulate make up a personalized stash of self development goodies, so take advantage now and again.

# Not Just For Me, Your Coach

The tools of The Kaleidoscope Corner are first and foremost concerned with you getting the most out of being coached. Yes, the actions, metrics, journaling and so on will largely be directed by (or otherwise stem from) the work you do with me, but please feel at home to set things up to support yourself in whatever's important to you.

Want to take advantage of the reminders you can set for some other things on your to-do list? Go right ahead and set up a few Actions to support yourself.

Got something else you'd like to track over time with a Metric? Set one up and make your own game with targets to play for.

Want to journal out your thoughts on something not directly related to your coaching program? Feel free, I might even lend insight into whatever it is you write about.

If it helps you to get things done, grow as a person, or otherwise makes your life better, I promise you I will be delighted by your use of the system.



Make yourself at home and use the tools provided to serve you however they can.

# Mechanics

The fundamental building blocks of a coaching relationship, as structured by The Kaleidoscope Corner, are:





Session Notes



Appointment Scheduling



Interactive Worksheets



Online Billing



Activity Stream



Metric Tracking



Journal Entries



Action Items

Here in **Mechanics** we're going to look at each of these in turn, cover the basics of what everything means, learn how to setup and use each, and reveal a few non-obvious features as well.

## Managing Actions

Actions are like your to-do list of how to progress and grow through our coaching relationship. They can either be assigned to you or you can create them. Actions consist

Action:

Due By:  at

simply of the "what" and the "by when":

To help you keep up with your action plan, you can set as many reminders about it as you like:

Remind me  days before via email [remove](#)

Remind me  hours before via email [remove](#)

[Add Reminder](#)

Note how, by default, reminders are available via email only. The Kaleidoscope Corner can send you reminders via text as well, but only to US cell numbers. If you're in the US, adding your cell number on your "My Account" page is all it takes to give you the option.

Finally, when setting up an action you can add

Remind me  days before via  [remove](#)

email

email

text

an optional note. This is a good place to put execution or pertinent motivation.

**Tip:** Reminders are set relative to the date the action is due, e.g. 2 days before or 5 hours before. Hopefully this won't be the case often, but if you think you'll be late in completing an Action you can actually set reminders for after the deadline.

Do this by setting the reminder a negative number of hours/days/weeks before. It sounds weird but the math actually works out: "-2 days before" means, to a computer, the same as "2 days after".

Due By:  at

Remind me  days before via email [remove](#)

All told, setting up an action looks like this: By viewing the Action on the Stream tab you can also leave comments which go right to your coach, making it easy to strike up a supportive dialog if you need it.

**Plan an Action**
X

Action:

Due By:  at

Remind me  days before via email [remove](#)

Remind me  hours before via email [remove](#)

[Add Reminder](#)

I think having this will make folks really comfortable with setting up their own actions, which is nice because then they'll do it more often and stay more on track.

Create
Close

Once created, a new action goes right into your list of things to do:

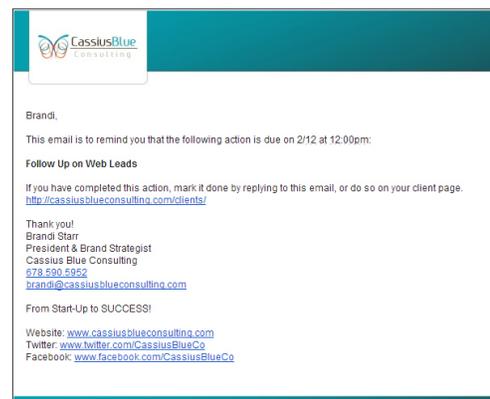
**Make a nice image illustrating an action**  
Due on Friday (9/13) at 7:00pm
Done

I also gets an email notification of your new action, and with it can quickly give you feedback.

You can modify an Action, including changing its due date and setting more reminders, by clicking the little edit icon next to the "Done" button.

## Marking Actions Complete Via Email

The basic way to mark actions complete is to click the big "Done" button next to the action. But this requires you at a computer (or on a mobile device) and logged in to The Kaleidoscope Corner. You can also mark actions complete on the go by replying to reminder emails and texts. The email itself gives hint on how to do so:



So you can mark it done as of right now by replying to the email with the following:

Done.

You can optionally indicate when it was done, like so:

Done.  
Yesterday at 5pm

**Tip:** If you've got something you're aiming to do, say, every day this week, instead of creating 5 nearly identical actions try setting up what I call a "pseudo-recurring Action".

Create one action to do that thing 5 times, make it due on Friday, and then make a reminder 1 day in advance, 2 days in advance, 3 days in advance, and so on. That way the system can give you a reminder every day, prompting you to do it each of the 5 days.

Be sure to set the due time smartly to have the daily reminders fire off at an opportune time. This is a great way to instill good new habits.

Action:

Due By:  at

Remind me  days before via email [remove](#)

Remind me  days before via email [remove](#)

Remind me  days before via email [remove](#)

Remind me  day before via email [remove](#)

Remind me  minutes before via email [remove](#)

**Tip:** You can also cancel an action by replying with “cancel” instead of “done”. You can add a comment when canceling this way.

You can optionally add a comment on a new line:

Done.  
Yesterday at 5pm.  
That went really well, can't wait to tell you about it.

## Marking Actions Complete Via Text

Marking an Action complete by replying to a text works similar, but because texting a little more primitive you can't supply the date it was done. So your replies will look like:

Done.

Or

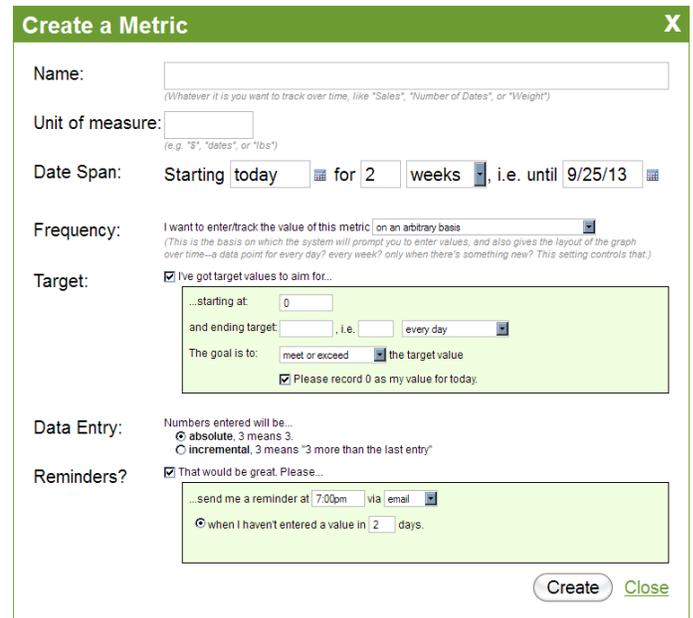
Done. That went really well, can't wait to tell you about it.

## Tracking Metrics

Metrics allow you to track your progress in terms of real numbers. When you do this regularly over a non-trivial span of time (say, 2 weeks or more), magic happens: patterns become apparent, insights are revealed, and progress (or lack thereof!) is tangible.

**Tip:** Want more examples of how to mark actions complete? Just reply to an action WITHOUT a recognized “done” or “cancel” command and you'll get a friendly email in reply which explain things in greater detail.

Metrics are powerful and flexible, and make this kind of regular tracking a cinch. Still it can be a little intimidating to set one up the first time.



The screenshot shows a 'Create a Metric' form with the following fields and options:

- Name:** A text input field with a placeholder: "(Whatever it is you want to track over time, like 'Sales', 'Number of Dates', or 'Weight')".
- Unit of measure:** A text input field with a placeholder: "(e.g. '\$', 'dates', or 'lbs')".
- Date Span:** A dropdown menu set to "Starting today" for "2 weeks", i.e. until "9/25/13".
- Frequency:** A dropdown menu set to "I want to enter track the value of this metric on an arbitrary basis".
- Target:** A checkbox labeled "I've got target values to aim for...". If checked, it shows:
  - starting at: 0
  - and ending target: [input] , i.e. [input] every day
  - The goal is to: meet or exceed the target value
  - Please record 0 as my value for today.
- Data Entry:** A dropdown menu set to "Numbers entered will be...".
  - absolute, 3 means 3.
  - incremental, 3 means "3 more than the last entry"
- Reminders?** A checkbox labeled "That would be great. Please...". If checked, it shows:
  - send me a reminder at 7:00pm via email
  - when I haven't entered a value in 2 days.

Buttons: "Create" and "Close".

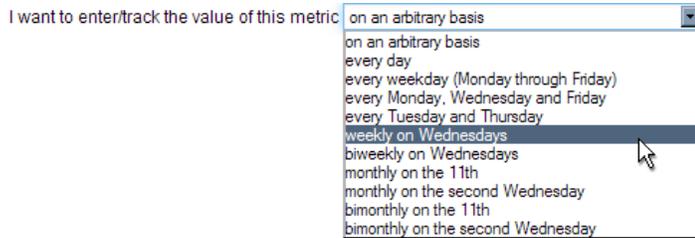
Quite a lot at first glance, so let's break this down one heading at a time.

**Name:** The name of the Metric should be a meaningful-to-you label of what exactly it is you're tracking. The help text gives some examples.

**Unit of Measure:** If you track 3 in a given day, unit of measure is the answer to the question “3 what?” Dollars? Dates? Pounds?” Avoid generics like “#” or “number”, otherwise you'll see odd things like “3 #s has been recorded for today”.

**Date Span:** Metrics are all about tracking results over time, so this is where you specify what range of days on the calendar you would like to track. Feel free to back-date the start of a Metric if you have historical data you'd like to include.

**Frequency:** This is a matter of how often you want to be recording results. Every day? Every week? You have several options



**Tip:** If you want to track, say, weekly on Fridays, but the system is only giving you the option to track weekly on Wednesdays, simply set the Metric to start on a Friday and pick again.

Goal setting is powerfully orienting so this is always highly recommended. The “i.e. \_\_\_ [every day]” controls give you a convenient alternative to specifying the end target. So if you want to, say, do 15 minutes of meditation every day for 2 weeks, the system will do the math for you that your end target should be 210 minutes.

**Data Entry:** This is the easiest and most common setting to get wrong in all of The Kaleidoscope Corner, so let me make this Mechanics section of this manual count and really make this clear.

- If your goal is starting at zero and building to something (common examples include dollars earned, pages written, and total minutes of exercise) then you’ll want to choose **incremental** because a number you enter today should be added to the total thus far.
- If you have a daily goal that’s not meant to accumulate (common examples include calls made, weight lifting reps, and weight) then **absolute** is the right choice.

You can always toggle between these two modes, so if you change how you’d like to structure your goal (from a daily one to an accumulating one or vice-versa) its no problem.

**Reminders:** Reminders are the magic behind regular tracking: set this once here and the system will ping you on the right days with an email or text, prompting you to record your number for the day before you forget.

## Reporting via Email

If you opt for email reminders, simply reply with the number for that date plus an optional comment about the result. Leaving a comment is highly recommended for reasons outlined earlier in this manual.

## Reporting via Text

Reporting your numbers via text is very similar to replying to email reminders, save for one gotcha: you can only reply to the most recent text that was sent to you. So if you have 3 metrics and the reminders all fire off to you via text at, say, 7pm, the system will think that any reply you send applies only to the third one.

To get around this you can stagger your reminders in time, sending at, say, 7pm, 7:10, and 7:20. If you have an email-enabled phone, your best option may be to simply choose email reminders, allowing you the freedom to reply to each at your own pace and in any order.



## Reviewing Session Notes

After each session I will share session notes with you. You'll find them to be a lovely resource, containing concentrated nuggets of the very best from your sessions. Often they'll be emailed right to you, and otherwise you can always pull up the growing collection by going to the Stream tab and unchecking every box except Sessions.

## Doing Worksheets

I may assign you worksheets to complete. For better or worse, you have to be logged in to The Kaleidoscope Corner to complete them. You can't fill them out via email.

The good news is that email notifications of the worksheets themselves will contain a magic link which, when clicked, will take you right to the worksheet, ready to fill out. So you're never too far, and worksheets can even be done on a web-enabled smart phone if you're not averse to a little pinch-and-zooming.

### Worksheet Assignment X

WTF Checkin - What's That Feeling?

*This worksheet is designed to give you a chance to look at how things are going, specifically in regards to what's not getting done. Start from the mindset that when deadlines are being regularly missed, there's often an unspoken thought about how things are going to go. Ergo WTF: What's That Feeling.*

**What are you currently NOT getting done, perhaps even actively avoiding?**

Possibly some of the images for this manual.

**Why might that be?**

So many! I suppose the end result is going to be pretty...

"Save" allows you to save this worksheet as a work-in-progress, ripe for resuming later.  
"Complete" is a matter of you officially submitting this worksheet to your coach as finished, so don't forget to do so!

Worksheets come with a due date, and otherwise you can work at it at your own

pace. Simply click "Save" if you'd like to pick up working on it again later, and otherwise be certain you click "Complete" when it's all done. This is what will submit the worksheet back to me, and mark it officially done (hopefully before the deadline has passed!)

## Writing Journal Entries

Writing a journal entry is as simple as clicking the "+Journal Entry" button at the top of the screen, giving your entry a fitting title, and getting down to it. A few simple formatting tools are available for you if you care to add headings or the occasional bit of *italics*, and otherwise you're free write to your heart's content.

You can save drafts that aren't yet ready to be committed, and only when you've marked a journal entry complete will it be visible to me. Once completed, you have a 30 minute window in which to bring it up again for edits. After that time it's committed to the ages, and unless you've marked your missive as private, it will be shared with me via email, paving the way for further conversation and support.

## Sharing Files

I can share files with you periodically via The Kaleidoscope Corner, and accessing them is as simple as clicking the big "Download" button (or, easier still, clicking the magic download link in the notification email about the newly shared file).

You can also share files with me. When you do this you can either upload it from your own computer or share a link to the file hosted elsewhere on the 'net. Easy peasy.

Share a File
X

Upload a new file

Link to a file hosted elsewhere online

test

The URL you indicate can point directly to a downloadable file, or to some page that allows your coach to download. Please be certain it works as you expect!

**File Title:**

This is optional: if left blank, the name of the file will be used.

**File Description:**

Send John a notification email

**Add a personal note:**

Add this personal note as a Stream comment

comments, of course):

I'm thinking this was a really good journal entry. Still, can I get a little feedback on how you think I might improve?



Emailed comments can be replied to as well to continue the dialog. It's a great way to have focused mini-conversations about happenings in our coaching relationship.

## Closing Thoughts

Now, after taking in the essays of **Motivation** and the bite-sized lessons of **Mechanics**, it is my sincere hope that you are in a place of excitement.

May you be excited for all that there is for you to get out of our coaching relationship that is yet to unfold, namely the results you have at stake in your personal and/or professional growth.

Keep up with your action plans, write out your thoughts, track your progress, review your insights, and stay in communication with me. Stay engaged and I promise I will have your back as you take on ever bigger things.

## Leaving Comments

On any of the other items within The Kaleidoscope Corner, you and I both can leave comments. A lot of the time you can make a comment on something by replying to the email which announced it. You'll know this by the little hint found at the top of the email:

Reply ABOVE THIS LINE to add a comment to this journal entry.

Otherwise you can always make comments on any item found under the Stream tab:

Sep 11
2 hours ago at 1:02pm

**A fitting title**

If one were so inclined, one could even add **bulleted lists**, which are nice for:

- Clarity
- Organization
- Fulfilling on The Rule of 3's

I'm thinking this was a really good journal entry. Still, can I get a little feedback on how you think I might improve?

Make this comment private
 cancel

Either way, your comment will be immediately emailed to your coach (except private