



PROFESSIONAL CHRISTIAN COACHING TODAY

Chris McCluskey & Kim Avery

*The podcast dedicated to Raising the Standard of Coaching...
and Changing the World*

Episode 051

Dr. Michael Marx on Ethics & Risk Management for the Christian Coach

CHRIS: Ethics and risk management for Christian Coaches. Well, that title may not have exactly grabbed your attention and gotten your heart today when you saw it, but somewhere at least it caught your mind enough that you recognize, “Hmm, that’s probably pretty important,” and indeed, it is. Good for you for tuning in today as we attend to some of the very important pieces that make our profession truly a profession and that help guard against our profession and the practice of it becoming a nightmare – becoming a nightmare for you as a practitioner or for your clients having contracted and then having something blow up in their faces or some kind of private information be shared in an inappropriate setting, or be taken advantaged of in some way, even becoming a nightmare if you were contracting with a company, a ministry, a church, a denomination and ethical practices were not being followed on both sides of the table, so to speak.

With that introduction to such an important topic, let me tell you who we are interviewing today. Dr Michael Marx is perhaps the best person we could possibly have brought in for today’s interview. He is president of the Christian Coaches Network International. He is also a professional certified coach through the

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International Coach Federation and runs a private practice called BlazingNewTrailsCoaching.com and he specializes in executive, business, and life coaching as well as doing private mentor coaching with other coaches entering the field.

Michael has served on the ICF's Ethics and Standards Committee, the ICF Global Ethics Education Subcommittee, and he is currently the leader of the ICF Global Ethics Community of Practice and a member of their Independent Review Board. That's the board that has cases reported to them of questionable activity by coaches. Add to all of that, he is also the author of a brand new text that just hit the market three weeks ago called Ethics and Risk Management for Christian Coaches. I don't think we could have a better guest on the interview and Michael, thanks for being here with us.

MICHAEL: Chris, thank you very much. I am so happy to be here. It has been a wonderful journey getting to this point where I can say my book is in my hand and it's ready for sale. Wow! I've got so much to say about it but I'll let you guys go with the flow and ask me questions. I just am happy that both of you are here to spark me and inspire me.

KIM: I'm excited, Michael, that the book is in my hands as well too. I know this baby has been a long time in birthing and it has been well worth the effort. Michael, you have such a fascinating background not only in ministry, in business. I know you have been busy spearheading really this massive effort by the ICF Ethics Community to increase exposure, the importance of ethics. You are the president of Christian Coaches Network International. Can you just give us a peak into some of that background and how the Lord has brought you to this unique place of service where you now find yourself?

MARK: In Germany many years ago, I had started an ICF chapter in Hannover and one of the requirements was that we give a presentation every year on ethics. When I asked how we do that, they said, "Well, you can be the first person to do that," which I did and that presentation started going all around Germany. In other

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words, I was traveling a lot giving that presentation realizing there is a very strong need for light and salt in the secular word of coaching. This is a great place for Biblical principles to really hit the road. When I came back to the United States, I started working in many different capacities within the ethics community and then I got started with the Professional Christian Coaching Institute on the faculty and the rest is history.

KIM: Well, it certainly is for me. I know that that's where we had the opportunity to meet and I've learned so much from you. Now you've authored this brand new book, really the first of its kind in our field, Ethics and Risk Management for Christian Coaches. Talk about the genesis of that book.

MICHAEL: Indeed. We were having a problem finding material for the ethics course and what is on the market besides this book is really not much. I mean, I'm looking at my bookshelf on all of the books that relate to Christian coaching and ethics. On the ethical side is like 4-5 books and on the coaching side are a couple of dozen. The material needed to be revised that we were using, nothing was available. It needed to be written. No book has ever been written on coaching ethically from a Biblical perspective and it was time that this was put into print, put into practice, put into our lives as professional coaches, and it was a pleasure to do and it was a lot of work.

CHRIS: Well, it definitely is high time that it was out. In fact, Michael, in my endorsement of your book that appears on the back cover, I said, "At long last an integration of our Christian worldview and morality with the standards and code of ethics of the International Coach Federation. Dr. Marx has blessed the Christian coaching community with a much needed resource to elevate our professional standards of practice."

I know that in the two of co-developing this course that you teach here at Professional Christian Coaching Institute, we developed that along with Jory Fisher, who is an attorney, one of the original founders of the Law Department at Liberty University. The three of us as we were talking about this course and

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developing what needed to be addressed really recognized that at the very beginning, one of the most important things to distinguish is a difference between ethics and legality, and even then morality. So we've got three things – ethical behavior, legal behavior, and moral behavior. Talk about those distinctions right off the bat here.

MICHAEL: Excellent. Morality is the basis for all of it. Without a moral compass, we're all adrift and every culture will try to instill in its children a moral code. That will be passed down from generation to generation. It's very good and it's very necessary. That moral code tends to get askew sometimes in states of rebellion and people get into trouble, but it usually is when we teach a child in the way that they should go. They do not depart from it and that moral code from a Biblical perspective obviously should be based on Christian principles and values. When that is put into practice, then there is ethical behavior. In other words, you could say moral code is the foundation and ethical code is the interpretation of the practice.

A code of conduct is where the person is saying, "This is what I do. My moral code applied to my ethical code. I've come up with my own code of conduct." "The society with which you're around is going to also say there's a code of conduct. There is a way in which we define in these parameters it to be good or not so good and when you cross that line, you've crossed the legal code line and that needs to be sometimes penalized in order for people to understand. I've crossed the line. Otherwise, like in most situations, it's not so much a penal code. It's much intended to be an educational code. Nobody wants there to be violations. We all like to live in peace and harmony, live within those boundaries. It's really just a question of moral, ethical, and legal boundaries which keep us on the straightened arrow, so to speak.

CHRIS: And it's such an important distinction for us to have here. I love the way you've laid that down, but it's like morality is the foundation. If we all held the same basic moral code, if the whole world was a Christian world, we'd like to say, "Oh how wonderful everything would be." I'm not sure that it would be but it seems

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like it would be. We certainly don't all hold the same moral code, not by a long shot and so our morality is highly personal. It's individual. Whatever a person's convictions are, whatever religion they hold to the teachings of that or their moral code and upon that personal conviction, you have then the societal interactions with other people who may or may not hold your same morality. It's there that we talk about just ethical behavior. Is that the right way to treat people? It may or may not be Christian, it just doesn't seem right and so people talk about ethics on a societal plane, not just a personal plane, but then certainly society gets into conflict and doesn't always agree with whose moral should we follow here and that's when to get to legality. "Okay, let's, in the court of law, decide this is going to fly, this is not going to fly." When you do this, you're going to be shut down or penalized or whatever else. You've stacked the three very, very nicely for us. Thanks.

MICHAEL: I would encourage all Christians to talk about this distinction as an everyday topic because this is really where we could be light and salt. In other words, we don't have to be preaching Jesus but we can be preaching boundaries and we can be preaching how to live right and live effectively within those boundaries. It's a ministry waiting to happen without necessarily being evangelistic, but at least we can bring light and salt into every conversation.

KIM: Sure and then on top of that as Christians and believers, you have a special place in your heart and almost to be evangelistic because you spearheaded about helping Christian coaches really understand potential ethical issues, liability risk matters and bringing this into their work. What is important about this?

MICHAEL: Well, most new coaches are very concerned about crossing the line, doing something wrong, getting into trouble, and going to court. To my knowledge, Jory's knowledge, and really everyone I've talked to, there has never been a court case specifically related to coaching. What happens is there are a lot of court cases involving Christians and there are a lot of court cases involving coaches. Usually, those are business practices. In other words, there's the liability of running a business and crossing the line doing something that is from a business perspective

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not good. The client gets upset or the vendor gets upset and the coach finds themselves answering questions in front of authorities. That, like I said, usually does not have to pertain to the coaching itself but of the running of the business and what I find is that I'm answering questions almost on a daily basis as to what is right or what is wrong because there is a strong need for people to have a perspective on what they are doing in those boundaries so that they can stay within them.

CHRIS: I can well imagine that your phone probably rings or actually probably your email inbox lights up with questions like that. Ethics, like a lot of the things in a psychology based field like coaching is a soft kind of a thing. You try to lean into it. You just kind of keep leaning. It seems to give more than you wish it would. Legal issues not so much but ethical and moral issues, yes. They are spongy but anybody listening to us right now and tracking with what we're talking about in terms of distinguishing between legal issues. Yeah, okay let's set those off the side for a while now. We're going to deal with the softer issues of ethical behavior and moral behavior for us as Christian practitioners. There are some very clear important applications of ethical practice and liability risk management, some things that just any coach in private practice needs to be thinking through as they set their business up, as they contract with clients, and exchange money and services, and then as they deliver that service throughout months or years. Michael, can you walk us into some of those key important applications?

MICHAEL: First of all, the biggest thing that I have discovered is that when there is a problem, there's usually a lack of respect. The coach or maybe it's even the client or the vendor is not respecting the other person's rights to speak, to act, to move, to have their being. What that often means is that there are things like confidentiality, trust issues, dual roles, relationships here that have again crossed that line but not necessarily in a legal way but certainly not in a moral way or as the code would define, an ethical way.

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Let's take for example the client tells the coach their coaching goal for conversation is to lose weight. The coach says, "That's fine." We work into a conversation. We come up with a goal, an action plan. Everything's fine. The client hangs up with the coach, goes back to the dinner table, sits down with his family and says, "My coach said I was fat and I need to lose weight." That never happened but in the client's mind, the coaching conversation resulted in an action plan that is the coach's responsibility and not as much as the client's responsibility. That's the genesis of it. So it's the coach that said that they were fat, not their own inner voice.

When that comes down to a conflict situation, the client is going to be saying, "Yeah, you said on the phone that I was fat." Even if that never happened, this is the type of liability transfer that we get all of the time and the coach needs to be really sensitive to coaching the client's needs and not necessarily the client's wants because as we coach into the client's needs, they will realize that the responsibility lies with them and with no one else.

CHRIS: Michael, that's a great example with dietary issues, which is certainly some themes. Self care is one of the themes that people coach around a lot but it's one thing when something like that gets a little ugly between client and coach if the client hasn't actually received an internal message but instead feels like the coach made some kind of a judgment whether, like you say, it was actually said or not, but if we're coaching around, say, a business decision or a financial decision, sell such and such a property or invest in such and such a thing, heaven forbid that the client leaves that thing that the message came in from outside as an advisory kind of thing. "You should do this, client," and then they do it and the thing blows up. They lose their shirt financially. Their business goes out of business. We got to make sure that we are running a clean practice that is based on the standards of classic coaching - not consulting, not advising, not mentoring - so that the responsibility for such huge decisions clearly lies with the client because they were birthed from within the client. They didn't come from outside the client just kind of being handed as some kind of advisory piece from their "coach."

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MICHAEL: Last year I wrote an article for the Coaching World, the November issue, called Giving Advice with Teri-E Belf. You can Google that “Michael Marx Giving Advice” and it will pop up. It was the most read article that ICF published in 2015. People really want to know what it means to give advice in an ICF type nondirective way and you can do it and it’s without judgment as you said. Putting items on the table that the client can pick up - or not – without any judgment, without any suggestion that they have to go in one direction or not. That’s where liability comes in when you start becoming prescriptive, when you start becoming autocratic, and when you start becoming the guru on the stage instead of the coach with a listening ear.

KIM: That is so tempting in our day and age because we do see those gurus everywhere, but could you give an example and flesh that out because my guess is that our listeners are highly ethical, highly moral, very much wanting to avoid legal trouble. Sometimes I think as coaches, maybe the temptation is to swing too far the other direction too in terms of caution. If you could flush this out with a practical example, what would be the difference between somebody giving advice in a consultative, authoritative way and someone putting things on the table for a client? Feel free to just make up a scenario for us.

MICHAEL: Okay. Let’s just say that the client wanted legal advice or better financial advice. “I could do one thing or the other and I’m not really sure.” Well, I’m an MBA and I’m actually qualified to give advice in that venue if it were. Especially in international finance issue, I’m a professor on the topic. I could do that and the clients often will hire me because of that expertise. In other words, they know I have the background to play in their sandbox when it comes to international finance.

When it comes to actually giving advice, what you would usually do is give expert scenarios. “Some people do this, some people do that. I’ve heard of other things being done here. Michael, what would you do?” “Well, what I have done in the past are A, B, and C. In your situation, it’s completely up to you.” “I don’t know

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what I would do.” I would throw it back to the client. The key to giving advice is recognizing whether you’re qualified to give those things or not. If you’re not qualified to distinguish between A, B, and C, you probably should say so and let the client decide to move or not.

Let me give you another scenario. I had a client call me. “What do you want coaching on today?” “Well, I’d like to decide on what to wear to an event on Friday. A business networking event and I don’t know what to wear.” Michael is clueless. Michael has no idea. I’m supposed to coach a 63-year-old woman on how to dress for a business event in the United States and I just got off the boat from Germany. I don’t think so. I quickly made a disclaimer. “This is not my sandbox.” She said, “Yes, but I trust you as a coach.” We trust the process. We trust the client. We trust the Holy Spirit.

That’s my axiom. Trust the client, trust the Holy Spirit, and trust the process. She found out what she needed to wear. She was very happy with the event. She reported later that she was very pleased with her outfit and got compliments on that. That doesn’t mean you have to be an expert but you do need to trust the process and as a Christian, trust the Holy Spirit.

CHRIS: That’s a huge principle right there and in fact, it’s a lot of what Kim and I circle back to particularly in our episodes called Master-full Coaching. I know you’ve listened to some of those. We need to get a recording on here if you’re doing some coaching for one of those master-full coaching sessions, Michael, but that notion of the process. We’re talking about the classic ICF aligned coaching process, professional grade coaching.

The process is basically helping a client to call forth from within self or for the Christian to call forth from within self and the Spirit’s communion with our spirit, the things that are in there and to hear them come out of their own mouths, that’s the process of discovery, of discernment as something as spoken forth, then it becomes clearer in the speaker’s ear as they have this what they call so often a facilitated monologue. It’s them talking with themselves, them processing out

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loud, and that process of self discovery and discernment by the Spirit is facilitated by the coach using the coaching skills and tools and processes. Trusting that process, trusting that what comes out will eventually not only have clarity and truth for the client but will have far more investment and ownership on the part of the client when they begin to actually act on it. Then anything we could possibly just hand them from the outside. “Here’s a tip. Here’s a pointer. Here’s my advice.”

MICHAEL: And when your clients are Christians and they can recognize that this gain that they are getting is coming from the Holy Spirit not from the coach, and really not even from themselves but from the throne. How cool is that because is there going to be liability? I mean, if they are going to complain to God, they are going to do that all the time. We do that every day in our prayers, right, but the liability for it coming from the coach is going to be reduced, in other words, nil when you’re trusting the client to come up with the solution for themselves and not from the coach’s knowledge or expertise.

KIM: So to continue thinking about different applications, as someone whose background and maybe expertise, to use a loaded word in this conversation, is in marketing, I know that there are just a lot of ethical things that go into representing ourselves, representing what we’re doing, we’re representing the results of what we do as we put ourselves out as coaches to the public. Could you talk a little bit about that?

MICHAEL: Truth, honesty, integrity, respect like I said for other coaches and the industry. In other words, what you put out there in a marketing sense has to be honest. Are you a credentialed coach? Are you not a credentialed coach? We deal all the time in the independent review board at ICF with people that are kind of claiming to be credentialed and not really, or they have let their credential expire but they are still advertising it on their website. They have done something wonderful but it doesn’t really belong to them and it’s really theft of intellectual property.

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If you are a Christian and if you are putting forth Christian values, whether it is blatantly Christian or not, my website is not blatantly Christian because my target market is not Christians. However, I think anyone that gets into my website and certainly into a conversation with me knows very quickly what they are dealing with and who I'm connected with, in other words with God and the Holy Spirit. The point here is though, that we have to be honest in what we're showing and people need to know that that is part of what they are buying. It's kind of like not putting something on the sticker is wrong with the car and then the person drives away with it. You have to have full disclosure and that can come across in many different ways and it usually comes down to the coach understanding what they should be saying about themselves, what they are not allowed to or what they shouldn't be saying about themselves.

KIM: Along with the credentials and how we're representing ourselves, I know in marketing, I do want to be confident. I want to be confident that the processes that I offer to my clients and that my clients use are proven, they are tested, and they are reputable, but at the same time – and I'll be the first one to tell them – only God can make it rain or only God will bring the clients. When you look at a process when it comes to marketing and things that tend to work and not work, things that are proven to be more effective and less effective, I'm happy to represent that all confidently. Of course they make their own choices – what they are going to do, what they are not going to do – but I'm always honest and that's why I like practicing as a Christian coach because I can be that blatantly and say, "But at the end of the day, we know that God will bring the clients or not." It's in God's hands. For me as a coach, I love being in that position, not feeling some weird responsibility to make something work that I can't really control. I can only control what I bring to the table. God is going to control the process, what people do with it, the results they get.

CHRIS: Michael, I think one of the final like core applications of ethics in our field of practice that we haven't touched on yet and I'd like you to say a little bit about is the whole issue of risk management and that on the part of the coach, certainly

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anytime we offer our services in the marketplace, we undertake some degree of risk that somebody might slip and fall purposely crossing our threshold and we wind up getting sued for our coverage for our slip and fall or that they might accuse us of doing something which we either did do or didn't do but then we have to defend ourselves. They might make a foolish choice and blame it on us or their loved ones might or whatever else. There's always liability in this culture. It's a litigious society. Anybody can sue anybody for anything these days.

That being acknowledged, one of the points, one of the many points that you argue very well in the book is that the responsibility, the onus really rests on the part of the practitioner, the coach him or herself to set up the mechanisms by which they are most likely to run a clean practice. They are least likely to wind up with some kind of an ethical challenge or a legal issue or get themselves into ethically hot water because they are protecting their liability exposure, they are minimizing their risk. They are not taking on clientele that you can pretty much tell at the front door, "This isn't really a coaching client. This is not a coaching kind of an issue." It's that kind of stuff that not only puts us at risk if we run a sloppy practice, just kind of take in whoever comes no matter what their issues.

We wind up really kind of doing psychotherapy or addiction recovery work or whatever else under the umbrella of coaching, but it's also that issue that protects our profession against someday becoming regulated from the mental health boards, some kind of an outside entity that says, "Wait a minute, you guys are practicing something way too close to psychotherapy here. You call it coaching but that's something we regulate already in psychotherapy. You're going to be regulated from our mental boards here in this state/country." Can you take a little bit about just things that practitioners need to be consciously aware of in running a clean practice, screening who you'll work, how you'll work with them, and what issues you'll coach around?

MICHAEL: There are basically three things that get a coach into trouble and we find that if the coach is proactive, it needs things and I say we, meaning the IRB, the Independent

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Review Board, or the ICF and the review committee of the Christian Coaches Network International. When there is a good contract, most of the issues are taken care of. A good contract is the key. What keeps you up at night needs to be in your contract. If you have concerns, if you have been burned on something in the past, put that in the contract.

The longest coaching contract that I've ever see was 13 pages long and I think that coach was probably pretty upset about many different things that happened to her in the past. The shortest contract I've ever seen is mine. It's about six paragraphs long. I'm not too worried about it because I think I can figure out the ethical issues, but the point simply is that you are comfortable or not comfortable with many different things. If you don't want the client to call you on Fridays or Sundays, or you don't want them crossing a certain line, that might need to be said upfront at least in the contract if not in the initial coaching conversation.

The second thing that we find in the Independent Review Board is that dual roles are abused. We're all going to get into dual roles. The mental health community discouraged dual role relationships with clients. In coaching is practically unavoidable. It's even encouraged. It's a good marketing aspect of things here, but you also have to be careful that those dual crossovers where both of you have a point where you don't want to talk about it. For example, you're both in a Sunday school class. We'll talk about everything except our Sunday school class or we have children on the same soccer team. "Okay, we're not going to talk about the soccer team" and that gets worked out of the coaching conversations so that there is not an inappropriate crossover and one side or the other feels like a no go area has been ventured into.

The third is honestly relationships that I'm talking about, physical impropriety where people become too close here. We have seen cases where a pastor coaching somebody reaches across the table and put his hands on her shoulder and that becomes a case because she felt violated. Whether that pastor does that all the time or whether there was a table in between or I don't know about all the different

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scenarios that can come around that here but if the client is upfront and the coach is upfront about what is inappropriate relationship, then that usually works very well. Those three things if they are protected against, in other words, they were openly talked about at the beginning of the coaching relationships will usually fix 90% of the concerned problems that we will later see as a so called case and therefore, that awareness manages the situation.

KIM: And I know your phone connection cut in and out the tiniest little bit there, Michael so I do want to reiterate because those were such important points about ways we can be proactive in this area. Having a good contract, making sure we're covering anything we feel uncomfortable about, let's just put it in there, make sure it's covered so we sleep at night. Two, those dual roles, make sure we know which hat we're wearing at which time so that our relationships are every clean. Three, you said be careful being too close, having an honest relationship and having firm boundaries so that the client never feels taken advantaged of in any way.

As we start to wrap up here today, what do you see is the future for the ethics, the risk management field, and coaches? I know that we've had even some cases in certain states trying to, maybe this is my word, over regulate or make inroads into our field when we feel like we're doing a good job of self regulating our industry. What do you think is coming down the pike for us?

MICHAEL: The future of coaching is really exciting. There is a lot of explosive interest in coaching. What's really growing is the people that are interested in using coaching, the coach approach in their ministry, in their leadership role, in their management role. We're seeing a lot of different people pulling those wonderful ideas that we know work into their workplace, including the mental health professions. They are also pulling that into their workforce. They are using the coach approach more and more.

We're seeing from mental health professionals an increasing amount of people that are using our materials and maybe hopefully this book, Ethics and Risk Management for Christian Coaches. They will be using more materials like that in

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their mental health professions. In other words, we're not as concerned in the ethics community now as we were a couple of years ago about there being a standoff, about there being a real confrontation. Yeah, that might come. What really is happening is the industry is growing. It's becoming more professional. It's becoming more standardized. More universities, more high level schools are teaching coaching. There are people who are graduating from high school and saying, "I want to be a coach." It's becoming a recognized profession. That will keep that standoff that we have been afraid of for the last couple of years at bay hopefully.

However, in Tennessee, in Colorado, in Washington, there have been noises made about, "Well, shouldn't this be regulated under the mental health umbrella?" In each case, that was put down largely for the reasons that I just explained. Schools are picking it up, universities are offering degrees on it, there's a lot more research going into it. It's becoming a regulated industry in the sense that we have things like the Independent Review Board of the ICF that handle cases. There is a seamless process for complaints. The awareness is picking up. We're actually getting fewer complaints than we ever have had in the history of the International Coach Federation. Christian Coaches Network International hasn't had a complaint in years and it's largely due to the fact that people are understanding coaching better, what it can do and what it should be and what it shouldn't be. That means people are behaving ethically.

CHRIS: Man, that's exciting stuff and that's a good report from the field or out there, I guess, on the frontlines as you are, Michael. Again, I am just so thankful to have had you come because of the expertise and the background that you have in this field because of the fact that you're actually a thought leader in the field.

I just want to say then to our listeners, if you are interested in connecting with Michael, of course you can find him out on the web. His website again is BlazingNewTrailsCoaching.com. Out there when you're visiting the site, you will be able to order a copy of his new book, Ethics and Risk Management for

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Christian Coaches. There are actually now several other Christian coach training schools and universities looking at pulling that into their offerings for the next semester, putting in an ethics class. That's pretty exciting for the profession. Congratulations on that, Michael.

If you're looking for the book through other suppliers, it's available now online through Amazon, Barnes & Noble, Books-A-Million, any other online retailers. If you are interested in Dr. Marx's course here at Professional Christian Coaching Institute, the one that he and another one of our faculty members, Mindy King, teach called Ethics and Risk Management in Coaching, you will find information about that on our institute's website. That's simply at ProfessionalChristianCoaching.com.

Michael again, just thanks so much for your time today, your important contributions to our young profession.

MICHAEL: Thanks, Chris. Thanks, Kim. It was a lot of fun being here and I really enjoyed the podcast. God bless you and may this multiply.

CHRIS: Amen to that. Until next time, gang, just keep raising that standard of coaching and changing the world.

KIM: God's richest blessings to you.