

## **Downsizing Coach Skills Training Course Syllabus**

**Session dates:** Wednesdays: January 17, 24, 31, February 7, 14, 21, 28, March 6

**Session times:** 3pm-5:00pm (central time zone) - Please check your local time

**Live course access:** Provided following enrollment confirmation

### **Online materials and course library:**

LOGIN at "My account" - top right corner of [www.seniorsrealestateinstitute.com](http://www.seniorsrealestateinstitute.com)

Go to MY COURSES and select "Downsizing Coach Skills Training"

### **Instructor/Coach:**

Dr. Nikki Buckelew, Ph.D., CSHP, CSDC

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### **What's included:**

- Seven comprehensive training sessions delivered by Dr. Nikki Buckelew, PhD
- Downloadable SREI Senior Downsizing Coach Skills Guide including forms, scripts, talking points, and critical coaching questions
- Printed textbook and downloadable supplemental reading materials
- Access to private online group for collaboration and support

### **Required for certification:**

- Two private 1 on 1 coaching sessions (phone or video conference)
- Two private practice sessions (video conference)
- Comprehensive exam (passing is 85% or higher)

**Live Course Participation:** Requirements for certification are included in the live course enrollment. Participants must complete the certification requirements within 60 days of the final session. If unable to complete the certification requirements in the time allowed, students must purchase the coaching sessions, practice sessions, and exam separately and complete no more than 12 months from course start date.

**Self-Paced Participation:** Those seeking certification through the self-study course must purchase and complete the private coaching, practice sessions, and exam within 12 months of course enrollment date (no exceptions).

## Included with Certification:

- Your name highlighted as a CSDC on the SREI website directory
- Special recognition in media releases and social media posts following certification
- Usage of the CSDC mark/logo on marketing materials

## Course materials (included in live course enrollment):

- *Co-active Coaching (4th ed.)* by Kimsey-House, Kimsey-House, Sandahl, and Whitworth
- *How to Say it to Seniors: Closing the Communication Gap with Our Elders*, David Solie
- *Aging in the Right Place*, (2015), Stephen M. Golant

## Subject Matter

This course primarily emphasizes senior downsizing coaching skills. While the sessions and forums will primarily focus on coaching skills, we may address other related topics such as seminar development, senior community tours, marketing, etc., only if there is a direct application relevant to the coaching skills program.

## Session Topics:

Session 1: Introduction to coaching

Session 2: The deeper issues

Session 3: Powerful coaching conversations

Session 4: Coaching dilemmas

Session 5: Using metaphors and stories

Session 6: Demonstrating your difference

Session 7: Putting it all together

## Expectations

- Embrace new or alternative paradigms associated with the sales process.
- Refrain from comparing yourself to others in the group; everyone is at a unique point in their learning and integration of the material.
- Fulfill weekly assignments and reading requirements as outlined.
- Reinforce fundamental concepts between sessions and arrive prepared for each session.
- Demonstrate commitment during both group and individual sessions by maintaining attentiveness, focus, and active engagement—avoid multitasking.

## Practice Sessions

Practice sessions are approximately 1 hour each. Participants in the live course format are encouraged to schedule sessions early in the program to secure availability. These sessions provide an opportunity for you to showcase your coaching skills and pinpoint areas

for improvement. Conducted via web conference, your coach will assume the role of the client or prospective client. Instructions for accessing the session and the bio of the assigned "client" will be provided in advance, allowing you ample time for preparation.

## **Personal Coaching Sessions**

Schedule personal coaching sessions at least 2 weeks in advance. These two 30-minute sessions blend coaching and consulting, aiming to support you in seamlessly integrating coaching skills into your current practice. During these sessions, you can engage in role-playing, practice specific coaching techniques, or discuss real-life coaching scenarios with your coach.

Please note that these sessions are not intended for addressing non-program related questions or concerns. If you seek coaching outside the course's scope, kindly contact the program coordinator to arrange an individual coaching session with an SREI or peer coach (additional fees may apply). Missed coaching sessions (no-shows) will not be rescheduled. In the event of a scheduling conflict, notify us with at least 24 hours' notice for rescheduling.

## **Process over perfection**

Keep in mind, the path to becoming an excellent coach is a continuous process. It's not about achieving perfection or getting everything "right" (if such a standard even exists). This opportunity allows you to enhance your effectiveness, fostering personal and professional growth. Importantly, the coaching skills developed here will undoubtedly prove beneficial in various aspects of your life and business!

## **Sharpening the Saw**

As you progress through this course, mastering and applying new skills, it's essential to revisit key concepts initially covered in *Success in Seniors Real Estate*. You're the best judge of which areas might benefit from a refresher, so pause for a moment to review the list of characteristics expected of a **Certified Senior Downsizing Coach**. Should you need a deeper understanding, don't hesitate to refer back to your SREI course materials.

## **Being a CSDC means:**

- Having working knowledge, not only about mainstream real estate options, but also a strong grasp of the larger senior living options available nationwide. Specifically, what they are and what they aren't including correct terminology for describing each.
- Knowing the independent and assisted living communities available in your specific service area, such that you can speak to their features, service levels, representatives, and price ranges.
- Being able to clearly and accurately provide an overview of what move managers, estate liquidators, placement services, and other relocation related resources do, as well as approximations of what they charge.
- Providing clients with helpful local and non-local resources and information relative to their overall circumstances.

- Having the ability to take complex situations (or problems) and break them down into manageable pieces that can be tackled in a systematic fashion.
- Being willing to discuss the deeper issues associated with relocation and helping to normalize associated ambivalent or negative feelings.
- Having a desire to help people make informed decisions - even when those decisions may not match yours or benefit you professionally.
- Understanding the phase-of-life and developmental tasks associated with old age and the aging process.

We at SREI are thrilled to accompany you on this transformative journey. While the role of a real estate agent is undoubtedly rewarding, venturing into the realm of a downsizing coach can not only enhance your real estate skills but also broaden the horizons of opportunities within your practice.

Congratulations on embarking on the path to becoming a Certified Senior Downsizing Coach! Your decision reflects a commitment to personal and professional growth, and we're here to support you every step of the way.

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### **IMPORTANT**

Please call or email our program director immediately if you have a change of brokerage, mailing address, email address, or phone number while enrolled in the program to ensure that you continue receiving important course-related notices.