Sample Coaching Welcome Packet

The Sample Coaching Welcome Packet is for ACT trainees to use in hard copy form with their peer during Workshop 2 of ACT. However, all of the Welcome Packet resources listed below can be found on the Lifeforming website at www.lifeformingcoach.com for your use with clients. Several of the documents are in Word which enables you to adjust them as needed for your unique needs as a Lifeforming Growth Coach.

The Welcome Packet includes:

- Client Welcome Letter
- What is Coaching?
- Wheel of Life Exercise
- S.M.A.R.T. Goal Guide
- Phone Etiquette Guidelines
- Lifeforming Client Prep Form
- Lifeforming Growth Coaching Agreement – Non Fee Based
- Lifeforming Sample Coaching Agreement – Fee Based

**Additional forms for you to use as a Lifeforming Growth Coach:**

- Coach’s First Appointment Notes
- Coach’s Appointment Notes–this is a note sheet for your coaching appointments
Guidelines for Using the Client Welcome Letter

- Insert your contact information.
- Make any changes in the letter that you feel represent you as a coach and your client’s needs.
- Some details will be unique to each client/coach relationship, so make your packets unique. For example: In person or on the phone, or Skype, use of prep form or not. They have a goal or they need to develop one.

Sample Client Welcome Letter

Welcome!
Coaching is a helpful way to develop yourself as a person, work through pivotal changes, or live a more focused life. I’m looking forward to working with you to help you cultivate a life of greatness!

One of the things I most enjoy about coaching is that it isn’t about fixing people. Instead, a coach functions as a partner, helping you live out your own values and dreams for your life. You’ll be the one setting the agenda. I’ll focus our conversations and help you to go deeper and reach higher in your life. We’ll explore the strategies and support structures you need to succeed in reaching your dreams and goals, and together we’ll create a customized, systematic plan and walk it out to make your goal a reality.

Here’s how we’ll start. Since effective coaching is based on a solid relationship, I’d like to schedule a longer coaching session for our first meeting to help us get to know one another. I would enjoy hearing your life story, as well as telling you some of mine. Then we’ll take adequate time to finalize the goals you want to work on, review and sign a coaching agreement, and spend the remainder of our meeting creating a plan of action toward your goals that you can begin immediately!

I’ve included materials in your Welcome Packet for you to review prior to our meeting. What is Coaching? gives an overview of what coaching is and how it functions. I think you’ll find this particular information interesting as well as helpful.

I’ve also included exercises to help you clearly identify what you would like to include in your goals for our coaching sessions. Examples:

- A habit or skill you want to develop
- A dream or goal you’d like to pursue in a focused way
- Self-discovery: understanding more clearly your gifts, dreams, life stage or calling.

If you aren’t sure where to start, the Wheel of Life Exercise will help you evaluate your level of satisfaction in twelve different areas of life and hone in on which area you are most motivated to change. Then use the S.M.A.R.T. Goal Guide to create a clear, measurable goal. We’ll use this goal as the launch point for our discussion. If you would like to talk further on setting a S.M.A.R.T. goal, we can do this at our first meeting.
Sample Client Welcome Letter, (cont.)

Since we’ll usually meet by phone, the Phone Etiquette Guidelines gives a few simple procedures for phone appointments along with my contact information. There is also a Lifeforming Prep Form to illustrate what you’ll be filling out and emailing me prior to our meetings. A completed Prep Form helps me as a coach to be fully prepared for our meetings. I’ll email you the form before our upcoming coaching appointment. Finally, there is a sample Lifeforming Growth Coaching Agreement for you to review.

Please feel free to contact me with any questions that you may have. I look forward to a great, transforming relationship!

Sincerely,

Lifeforming Growth Coach
What is Coaching?

A Coach is a Personal Change Expert.
Coaches help people like you grow faster, perform at higher levels, understand themselves more deeply, and live with greater purpose and fulfillment. In the same way that a personal trainer helps a pro athlete maximize performance, a personal coach can help you get the most out of life.

What Happens in a Coaching Appointment?
Coaching appointments begin with a chance for you to report on your progress and end with a clear set of action steps you choose to take in the week ahead. But what is that essential spark between you and your coach that makes the relationship so transformational? Read on to discover four facets in coaching that lead to a fruitful outcome.

1. Coaching is a Transformational Conversation.
The biggest surprise for first-time clients is realizing that the coach isn’t there to give advice. Instead, powerful, incisive coaching questions stimulate you to examine the things in life that matter most from new angles. A coaching conversation can transform the way you look at life.

2. Coaching is a Transparent Relationship.
A coach is a friend and confidant, your greatest supporter, and someone who knows you well enough to call out the best in you. A transparent relationship with your coach frees you to go to places you’ve never gone before.

3. Coaching is a Support System for Change.
With support, encouragement, and accountability from someone who believes in us, we can do far more than we’d ever accomplish alone. A coach helps you stay on track, overcome obstacles, and convert your “want-to’s” into concrete steps that are put into your schedule.

4. Coaching is Continuous Leadership Development.
Coaches don’t give solutions; they help you solve your own problems. Coaching is helping you learn instead of telling you what to do. By leveraging every situation to build your capacity as a leader and a person, coaching prepares you to conquer much bigger challenges in the future.
What Can I Work On With a Coach?

The answer is, “Just about anything!” Increased performance, discovering your destiny, getting organized, regular exercise, slowing down, turning a dream into reality—you only need to answer the question, “What do I want to accomplish?” Coaching works in just about any area because it is about helping you learn. A coach is not an expert advising you in a particular field (that’s consulting), or someone more experienced who’s showing you the ropes (that’s mentoring). Coaches are change experts who help you find the solution for your unique situation. So if you want more from life—more growth, greater purpose, maximum performance—look into what a personal coach has to offer.

“Coaching is unlocking a person’s potential to maximize their own performance. It’s helping them learn rather than teaching.” Sir John Whitmore
Wheel of Life Exercise

how to
The Wheel of Life is a simple exercise to help you assess your satisfaction with the various areas in your life. For each of the sectors on the chart, rank yourself on a scale of 1 to 10. For example, if you are feeling great about your Personal Development, you might give yourself a “9”. You would then shade in nine-tenths of the Personal Development segment, starting from the inside out.

evaluation
The diagram below, when completed, can give you a picture of how your life currently matches up with how you want it to be, along with giving greater clarity in what you want to work on with your coach. If you’re not sure how to interpret the chart when you’re finished, bring it to our first coaching appointment, and I will explain it to you.
S.M.A.R.T. Goal Guide

how to convert a dream into a goal

Dreams are unrefined hopes and cost-free aspirations that we might do some day. Converting a dream to a goal is a decision to take tangible steps to pursue it.

Goals are specific future targets that we are committed to becoming or accomplishing in an action-oriented, time-specific way.

step 1: choose an objective

Choose a dream you want to pursue or an area of your life you want to work on. 17rcise can help you decide what to focus on.

step 2: make it S.M.A.R.T.

Next, try to define dreams or areas in your life that you want to work on using the S.M.A.R.T. format of: Specific, Measurable, Attainable, Relevant, and Time-specific. Use the definitions below as a guide for refining your goal:

Specific: A goal is specific when you can describe it concretely to others.

Example: “I want to be wealthy” is not a specific goal—how much money is wealthy? “I want to be a millionaire by the time I’m 40,” or “I want to be able to retire at my current income when I’m 60” is specific.

Measurable: You need to be able to recognize when you’ve accomplished it.

Example: “I want to be a better leader” is not a measurable goal—how do I know when I’m “better”? “I want to improve my leadership skills by completing a coaching certification this year” is a measurable goal.

Attainable: It can’t be a pipe dream or something unable to be realized.

Example: “I want to take a second honeymoon on our anniversary this year” is probably unattainable if you are seven months into a pregnancy and your anniversary is in two months.

Relevant: A goal is relevant when it’s important to you—when it references your values.

Example: “I want to be making all our payments on time by December” is a relevant goal for someone whose core personal financial value includes being debt free.

Time-specific: Goals are not open ended—they have dates attached.

Example: “I want to start a home for unwed mothers” is not time-specific; while “I want to get the training I need to start a home for unwed mothers and launch it in the next five years” is specific.
Phone Etiquette Guidelines

phone etiquette

- Calls are always made by the client to the coach.
- Call at the scheduled time agreed upon.
- Call from a place where you won’t be distracted.
- Avoid calling from a cell phone in your car.

contact information

Name: __________________________________________
Lifeforming Growth Coach
Coaching phone number for coaching appointments:
______________________________________________
Number for all other calls: _______________________
Fax: ________________________________
Skype Name: ________________________________
Lifeforming Client Prep Form

Assembling The Whole Story

Client Name: _______________________________________

For session date: ____________________________________

To be completed and e-mailed before each coaching session

What I have accomplished since our last meeting:
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

What I seem to be challenged by:
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

What I want us to focus on during our meeting:
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

My goals to accomplish by the next meeting are:
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
Lifeforming Growth Coaching Agreement – Non Fee Based

A non paying agreement for use in your training process

As your client, I’m excited about working together on my S.M.A.R.T. goal:

_________________________________________________________________
_________________________________________________________________

I’ll diligently complete the action steps we agree on and will be punctual for our meetings so we’ll make the most of our time together. I’ll consistently take the initiative with you in this relationship.

I’ll be a trustworthy client, honest and open with you, and handling what you share with me with respect and discretion.

As your coach, I’m excited about coaching you in this area. I’ll be punctual and well-prepared so we can make the most of our time together. I’ll be a trustworthy coach, honest and open with you, and handling what you share with me with respect and discretion. I’m committed to believing in you, supporting you in your goals, and helping you live out your destiny.

Practical Expectations

Meeting Frequency: We’ll meet ________________.

Commitment: We’re committing to work together in a coaching relationship for a period of ____________________________.

Review: We’ll take time on a periodic basis to review how our coaching relationship is going and make any needed adjustments.

Outside Perspective: As your coach, I may periodically approach a peer coach for advice and consultation on our coaching relationship in order to offer the best coaching that I can.

Action Steps: As a client, I’m responsible for my life, and I’ll make and follow through with my choices about what actions to take and what we will work on together.

Schedule: We’ll respect each other’s schedules by making every effort to hold rescheduling and cancellations to a minimum.

Initiative: As a client, if I can’t make a meeting I’ll take initiative to let you know and reschedule with as much notice as possible (24 hours minimum).

Initiative: As your coach, if I can’t make a meeting I’ll take initiative to let you know and reschedule with as much notice as possible (24 hours minimum).

_____________________________  _______________________________
Client                                 Coach

_____________________________  _______________________________
Date                                  Date
Lifeforming Sample Coaching Agreement – Fee Based

Coaching: As a client, I’m responsible for my life, and I’ll make and follow through with my choices about what actions to take and what we will work on together. I’ll consistently take the initiative with you in this relationship. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law.

I understand that coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation. I acknowledge that deciding how to handle these issues, incorporate coaching into those areas, and implement my choices is exclusively my responsibility.

I understand that coaching does not involve the diagnosis or treatment of mental disorders as defined by the American Psychiatric Association. I understand that coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of diagnosis, treatment or therapy.

I understand that coaching is not to be used as a substitute for professional advice by legal, medical, financial, business, spiritual or other qualified professionals and I will seek the appropriate professional service for such matters.

Goals: The Coaching goal you discussed working on as a starting place is:

______________________________________________________________________________________________
______________________________________________________________________________________________

Expectations: We are committing to work together for ______ coaching sessions over ______ months. We will meet ______ times per month, and sessions will be ______ long.

Remuneration:

• Package Fee: ________ per month, due on the first of the month or ________ one time payment.

• Make checks payable to: ____________________________________________

• My mailing address is: ______________________________________________

• Or, you may choose to pay using paypal, in which case I will send you an invoice.

• All coaching sessions must be paid for in advance.

Scheduling: We agree to be diligent to be punctual for our meetings. If we do have to reschedule we’ll give each other as much notice as possible (24 hours minimum). If you are late for a phone appointment I’ll try calling you after five minutes or so.

If you completely miss a scheduled appointment with no notice, you’ll be charged for that appointment. If you miss an appointment it is your responsibility to contact me and reschedule.

Phone: Our appointments will be by phone unless we agree otherwise. I can be reached at this number unless I tell you otherwise: ___________________________ __________________

Materials License: I understand that Lifeforming exercises and materials are being made available to me under license for my personal use only, and I agree not to sell, copy, distribute or use them with others.

Mediation: If we need outside perspective or help resolving a conflict, we’ll approach: _____________________________________________ first as a resource.

Termination: Either of us can terminate this relationship at any time. If we do, we’ll give each other one week’s notice. If you’ve prepaid for any coaching sessions after we’ve terminated, I’ll refund that portion of what you’ve paid. If one week’s notice is not given in advance, no refunds are due. If you miss two scheduled appointments in a row without contacting me, I will assume you have chosen to terminate the coaching relationship.

_________________________________  _______________________________________
Client                                     Coach

_________________________________  _______________________________________
Date                                     Date