

Welcome Packet

Read the information and follow the instructions on each page.

Dear Colleen,

Welcome to coaching! I enjoyed our recent telephone conversation, and wanted to commend you for making a commitment to move forward with coaching at this time in your life. And, I am delighted that you have chosen me as your coach—thanks!

This Welcome Packet includes the following forms:

- ~ Personal Information
- ~ Reflection Questions
- ~ What Am I Tolerating? Where am I Procrastinating?
- ~ **Coaching** Guidelines and **Coaching** Agreement

Previous clients have found that the Reflection Questions take some time, so you may want to spread out your reflection, doing a little each day over the period of several days. Bullets or phrases are a good way to respond. Take as much or as little space as you wish. By doing this work prior to our Initial Session, you will begin to focus on the current reality and on your future vision of yourself and your life.

I have a few requests to make:

1. Please fill out these forms and e-mail or fax them back to me so that I will have them the day before our Initial Session, which will be either 8/27 or 8/29 at my home.
2. Please bring these forms along with your calendar, so that we can set appointments for the month of September.
3. Please bring the Initial Session fee of \$200, payable to carpe diem COACHING.
4. Enjoy this time of preparation!

So, Colleen, I'm looking forward to meeting with you on either August 27 or August 29 from 4:15 to 5:45 p.m. In the interim, should you have any questions or concerns, please let me know, because I'm here for you!

My best,

Mary Jo

Personal Information

All personal information is confidential and treated appropriately.

NAME	
HOME ADDRESS	
HOME TELEPHONE	
E-MAIL ADDRESS	
FAX (H OR W); IS EITHER OK?	
OCCUPATION	
EMPLOYER	
WORK ADDRESS	
WORK TELEPHONE	
CELL/PAGER	
DATE OF BIRTH	
MARITAL STATUS	
PARTNER'S NAME	
NAMES/AGES OF CHILDREN	

Reflection Questions

Please answer these questions as clearly and thoughtfully as possible, expressing the fullness of who you are. These are pondering questions designed to stimulate your self-discovery and to make our work together more productive. Enjoy this time for yourself and for creating the life you want to live!

**1. WHY ARE YOU HIRING A COACH?
PLEASE ASTERISK THE PRIMARY REASON.**

2. WHAT DO YOU EXPECT FROM ME IN MY ROLE AS COACH?

3. WHAT CAN I EXPECT FROM YOU IN THIS COACHING RELATIONSHIP?

**4. WHAT IS YOUR LIFE'S PURPOSE OR MISSION?
HOW DO YOU STAY FAITHFUL TO THAT?**

**5. WHAT ARE YOU PASSIONATE ABOUT?
GETS YOUR BLOOD PUMPING? OR GIVES YOU JOY?**

**6. IF LIFE WERE "AS GOOD AS IT GETS"— WHAT'S THERE?
IF YOUR JOB WERE "AS GOOD AS IT GETS"— WHAT'S THERE?**

7. IN ORDER FOR ME TO EFFECTIVELY COACH YOU, WHAT SHOULD I KNOW ABOUT YOU? ABOUT HOW YOU THINK OR OPERATE? ABOUT HOW YOU REACH DECISIONS? ABOUT WHAT MOTIVATES YOU?

8. WHAT IS YOUR MYERS-BRIGGS PERSONALITY TYPE, IF YOU KNOW IT? IF YOU DON'T KNOW IT, WOULD YOU LIKE ME TO DO THIS INVENTORY WITH YOU AT A LATER DATE?

9. WHAT'S MISSING FROM YOUR LIFE THAT YOU COULD ADD TO MAKE IT COMPLETE?

10. WHAT'S PRESENT IN YOUR LIFE FOR WHICH YOU FEEL GRATEFUL?

11. WHAT ARE YOUR VALUES? ASTERISK THE ONE(S) YOU WANT TO LIVE OUT MORE FULLY.

12. WHAT ADJECTIVES DESCRIBE WHO YOU ARE NOW, AT YOUR CORE? WHAT ADJECTIVES DESCRIBE WHO YOU WANT TO BE IN THE FUTURE?

13. LASTLY, WHAT QUESTIONS/CONCERNS DO YOU HAVE ABOUT THE COACHING PROCESS?

What Am I Tolerating? Where am I Procrastinating?

People, things, and experiences sometimes cause our energy to leak out rather than to be tapped to meet our goals. What are you putting up with that drains your energy whether you're consciously aware of it or not? Or, to phrase this question another way, what are you procrastinating on that if you accomplished you would feel very relieved?

Examples might be in the contexts of physical environment (home, office, car, wardrobe), health (food, exercise, doctor appointments), relationships, spirituality, work, community service, money, etc.

Please list what you are tolerating or procrastinating in the space below. Brainstorm for as many ideas as you can, and then identify your Top Ten that you might like to act upon for your own satisfaction and joy.



Guidelines

Welcome!

I have positive expectations for a coaching relationship that helps you to create the life YOU want to live. To partner together professionally, I want you to be familiar with the following guidelines.

Terms of Coaching:

I invite you to think of coaching as a process. Many people create change for themselves in a short time. However, to refine and sustain the change takes several months. So, I begin the coaching process with a 3-month commitment on the part of both of us.

Fees:

My coaching fee is \$300 per month, payable to carpe diem COACHING, and received in my office by the first day of the month. My fee for the Initial Session is \$200, due on the day of the Initial Session.

Procedure:

Your coaching fee includes: 3 scheduled calls per month, each for 45 minutes at a scheduled time; e-mails if desired between sessions; 5-10 minute calls as needed. The sessions will be held weekly, typically the first 3 weeks of the month.

You will call me at the agreed upon time. If I am out of town at the time of our appointment, I will give you a number to reach me. If you wish to connect with me in between sessions with a challenge, a success, or an inquiry, I will make every attempt to respond to your call or e-mail within 24 hours on weekdays. Please limit these calls to 5-10 minutes. I'm happy to provide this extra level of service at no additional charge.

Changes:

If you need to reschedule our appointment, please give me 24 hours notice. Unless there is an emergency, if you do not show up for a scheduled call, we will not make up that time. If I need to reschedule our appointment, I will give you at least 24 hours notice as well.

Problems:

If I ever say or do anything that upsets you or doesn't feel right, please bring it to my attention so that we can resolve it as soon as possible. My objective is to have a coaching relationship that is fully open, honest, real, and trusting in our communication styles.

Coaching Agreement

COACH

- 1) I agree to serve as your coach — to partner with you to identify and achieve your personal and/or professional goals.
- 2) As your coach, I cannot guarantee results. You will create powerful results by having the courage and determination to forward the action in your life.
- 3) During the time we spend together in our coaching sessions, I will devote my time, thoughts, and energy to you, exclusively. In between our sessions, I may not be readily available, as I will be attending to others, including myself.
- 4) I am trained as a coach, not as a psychotherapist or physician, and I am not trained in diagnosing psychological or medical conditions. If any issues come up for you that should be handled by a licensed therapist or physician, I insist that you must attend to your health by contacting the appropriate professional.
- 5) As your coach, I will bring attentive listening, understanding, belief in you, and **commitment to your success**. You can expect me to challenge you, offer fresh perspectives, make requests (including assigning homework), acknowledge your wins, and guarantee utmost confidentiality in this powerful, sacred relationship.

SIGNATURE OF COACH

DATE

CLIENT

- 1) I am motivated and committed to taking action on my determined personal and professional goals. I realize that anything less than my intentional **full participation** will not lead to my success.
- 2) I accept full responsibility for myself and any actions I take that might result from coaching.
- 3) I can financially afford the coaching fee of \$300 per month at this time. I agree to pay promptly by the first of the month for that month's fee.
- 4) I agree not to take any legal action against Mary Jo Hazard, based on any matter relating to the coaching relationship or her performance of services within it.
- 5) I have read and agree with the terms of both documents: the Coaching Guidelines and the Coaching Agreement.

SIGNATURE OF CLIENT

DATE

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