

# LIFE COACHING



W E L C O M E P A C K E T

# WELCOME

I am excited to join you as you take your development to the next level and I want to express my enthusiasm for the courage you have demonstrated by making this investment in yourself. I believe we can have a rewarding partnership that supports the achievement of your goals.

The information in this packet is designed to orient you to coaching in general, coaching with me, specifically, and to help us both understand what our focus needs to be as we move forward.

## OVERVIEW

Coaching can be an incredibly effective tool for you, bringing you to new heights and enabling you to remove barriers to what is in your way. You will be able to:

- 1. Set more effective goals that motivate you.** It's important to distinguish between a want, a need and a "should." We will explore these differences, helping you to identify your values and then to actually choose which goals are in alignment with those values. You will also find that together we are able to craft reasonable goals that will feel bigger, richer and more exciting to you.
- 2. Move forward - professionally and personally.** Once the work is done in discovering your values and strengths, we will work at figuring out how to get from point A to point B. We will develop the tools to allow you to move forward.
- 3. Establish and maintain better boundaries.** This is so fundamentally important that dozens of books are written on the subject. When you are able to freely say "yes" and freely say "no," your life can become your own. Maintaining boundaries will unleash the best parts of you.
- 4. Enjoy a better life.** Our lives are filled with others; parents, siblings, spouses, co-workers, the media; telling us what's important and how we should live our lives. When you begin to orient your life around your own values, widening your vision while becoming more focused, your life will, quite simply, get better. This will happen whether you choose a conventional or an off-the-wall approach because it's your approach.

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.



# PROCESS

Since coaching is a unique relationship, with each professional coach bringing his or her own approach, the following is to help you understand how I coach and what you can expect of me.

**I provide an environment of discovery.** So much of coaching is about discovery. This will occur in a variety of ways such as assessments, questions and venting. I will facilitate the process so that you can discover your true self and your true wants.

**I share what I see.** I intuit, point stuff out and tell the truth as I see it. I also help my clients label events, situations and problems so they can look at them more objectively.

**I ask you what you need or want from me.** In order to be of greatest service, I need to know your needs and wants, understanding that my role may shift as your needs shift. I ask you to tell me when you want a sounding board, to be held accountable or to brainstorm, for example.

**I ask you to do more than you would do on your own.** You have hired me because you want to move forward, even though you may sense some internal resistance. As an objective person in your life, I am able to see where you can go and I make direct requests that you go there. Choosing to go there is up to you, and I will hold no attachment to the outcome – ultimately, you know yourself and what you need best.

**Your life is yours.** You are responsible for your outcomes, the speed with which you attain them and how far you stretch yourself. I will support and acknowledge your efforts and will also let you know when I think you can do more. You've hired me to bring you further. I can do that only when you are dedicated and willing.

**Communication is key.** I can best serve you when you keep me up to speed with new developments, changes and discoveries. While I don't need all the details, I am interested in you, and your information will be helpful to us both. When I hear a funny tone in your voice or notice something amiss, I'll ask you about it and invite you to take a closer look. These can be the most important moments in a coaching relationship.

**Our relationship is confidential.** While you may feel free to discuss our work together with anyone you deem appropriate, please know that I will not share anything regarding your coaching with anyone else without your explicit permission.

Please take time to go over all the documents in this packet and fill out all forms requiring completion. I look forward to our first session and to establishing your agenda for our coaching relationship!

With Gratitude,

**J. Currie**

Certified Life & Wellness 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.

LET THE JOURNEY BEGIN



# YOUR WHEEL OF LIFE

J. CURRIE 

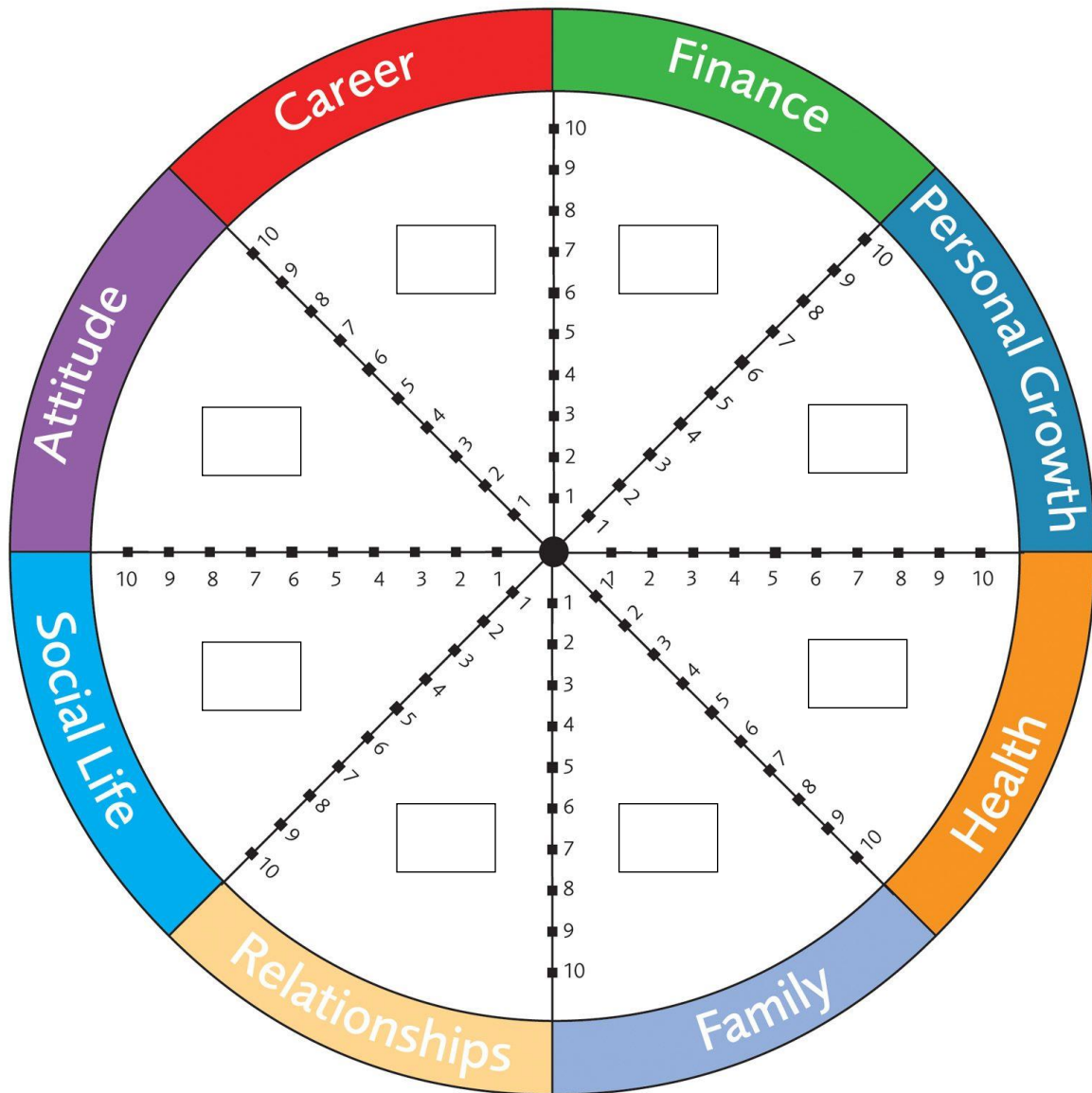
## COMPLETE THE WHEEL:

- Review the eight “*wheel categories*,” think briefly about what a satisfying life in each area might look like for you.
- Next, draw a line across each segment that represents your **CURRENT** satisfaction score for each area.
- Imagine the center of the wheel is 0 (very dissatisfied) and the outer edge is 10 (fully satisfied)

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

**IMPORTANT:** Use the first number score that pops into your head, not the number you think it “*SHOULD*” be.



ONLY I CAN CHANGE MY LIFE, NO ONE CAN DO IT FOR ME!  
~ CAROL BURNET

# COACHING GOALS

**PRIMARY COACHING GOALS**

Identify up to 3 primary goals you want to focus on during our coaching relationship. The goals you select should be challenging, meaningful to your growth, and achievable. To help you get started, try answering the following question:

*“How specifically would you like you, or your life, to be different after coaching with me?”*

For **each goal** write a simple heading and do your best to describe “measurable” results, i.e. how you'll know you have succeeded or are on track. For example:

EXAMPLE GOAL:	Be more productive at work!	Have more quality time with my kids!
<b>I’LL KNOW I’VE SUCCEEDED WHEN:</b>	I have a system to follow up on calls and emails, I am on time (or early) for meetings, I get 90% of my tasks accomplished, I complete project x	I'm home from work by 6 PM, once a week we go out and do something fun together, my kids won't complain that they never seen me, I feel happier

**GOAL 1:** .....

**I’LL KNOW I’VE SUCCEEDED WHEN:** .....

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**GOAL 2:** .....

**I’LL KNOW I’VE SUCCEEDED WHEN:** .....

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**GOAL 3:** .....

**I’LL KNOW I’VE SUCCEEDED WHEN:** .....

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# CLIENT INFO FORM

J. CURRIE 

## **Client Information**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Name you like to be called: \_\_\_\_\_

Address: \_\_\_\_\_

## **Telephone Numbers/Contact Details**

Home: \_\_\_\_\_ Work: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Skype Id: \_\_\_\_\_

Email/s: \_\_\_\_\_

Best Contact Method/s (Normal): \_\_\_\_\_

Best Contact Method/s (Short Notice): \_\_\_\_\_

## **Phone Session Etiquette** (When sessions are via the phone)

- 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 the car.

## **Employment Information**

Occupation: \_\_\_\_\_

Employer Name: \_\_\_\_\_

## **Astrology Information**

In order to complete an astrological birth chart, the following information is required:

Date of Birth: \_\_\_\_\_ Exact Time of Birth: \_\_\_\_\_  am  pm

City of Birth (where the hospital was located): \_\_\_\_\_

**The exact time of birth is required to complete a specific portion of the chart. It can be found on your original birth certificate. If the EXACT time is unknown write, unknown for Time of Birth. DO NOT GUESS!**

## **Personal Information**

Relationship Status: \_\_\_\_\_ Significant Other's Name: \_\_\_\_\_

Significant Dates (eg. Wedding anniversary): \_\_\_\_\_

No. of Children: \_\_\_\_\_

Name(s) and Age(s) of Child(ren): \_\_\_\_\_

\_\_\_\_\_



# COACHING AGREEMENT

J. CURRIE 

This agreement is between J. CURRIE, INC and; \_\_\_\_\_

- I understand that coaching is a partnership formed with the shared goal of my success based on my own individual definition and terms.
- I understand that everything we discuss in our sessions is strictly confidential.
- I understand that my coach regards me as whole and healthy and will help me to focus on my present and future actions and choices.
- I understand that coaching is not therapy, counseling or mental health care. My coach is not functioning as a licensed mental health professional and coaching is not intended as a replacement for counseling, psychiatric interventions, treatment for mental illness, abuse recovery, professional medical advice, financial advice or legal counsel.
- I understand that my coach is obligated to report any illegal activity by the client or admission by the client of intent to commit an illegal act. The client acknowledges that we are required to cooperate fully with law enforcement and other authorities as required by law.
- I am willing and ready to make shifts, even leaps, in my life and career!
- I am willing to stretch beyond my comfort zone.
- I will let my couch know if something isn't working for me.
- I give my coach permission to assign tasks to me at which point I can accept, decline or modify the task. Once accepted, I agree to be accountable for following through with the action.
- I understand that I will, at times, be challenged and this may be uncomfortable.
- I will be open and honest.
- I agree to pay promptly before services are rendered.
- I agree to call-in or arrive promptly for our scheduled sessions.

I understand that my coach is not a licensed therapist and that I am responsible for all my decisions, actions and feelings.

My signature on this agreement indicates my full understanding of the agreement and willingness to comply with the conditions outlined above.

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Signature

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Date