

The Lighthouse Group ***Welcome Package for Life Coaching Clients***

Imagine a relationship with someone who is totally interested in what makes you tick – your dreams, aspirations, passions; a person who will help you clarify your goals and provide tools that will help you achieve the results you want.

Imagine a relationship with someone who knows your values and life purposes would hold you true to them; someone who will lift the flag from the cup and cheer as you sink your putt; someone who will encourage and celebrates you even when you miss that putt by a country mile, then help you set goals to improve your game.

Imagine a relationship with someone who will tell you the truth about yourself – where you are strong, where you sell yourself short – someone who knows this is what you want to hear and that you can handle it. Someone who knows your potential and holds up that big picture for you. Someone who holds the ropes while you trim your sails.

Imagine a relationship with someone who listens without judging, condemning, analyzing or fixing you. Someone who believes you already have the answers within you, and who will hold the searchlight while you dig for those answers. Someone with powerful questions to cut through the fog.

A coach does not presume to have the answers. You already have them. You are naturally creative, resourceful, and intentional. Coaching addresses your whole life, not just one area, to help you achieve balance in all areas. The agenda comes from you, and you design the relationship. The coach's job is to help clients articulate their dreams, desires, goals, mission, and purpose, and help them achieve the outcomes they set for themselves. A counselor uses a therapeutic model for someone who needs healing; a consultant has expertise to offer someone who needs answers. A coach assumes you are the expert on yourself, and uses coaching techniques to help you design and then achieve the life you want.

If you can imagine these things, if you feel a twinge of excitement at the possibilities, then you are ready for coaching! Please fill out the Coaching Agreement, Personal Information Fact Sheet, and Individual Client Interview, and fax them to me at 303-697-2953. (We'll come back to the other exercises later.) Also please go to www.CoachLee.com and do her "values" exercise; make a note of which five values you end up with. I will then call you and we will together set up a mutually agreeable schedule.

I'm very much looking forward to working with you and am excited about what you are going to be doing in your life!

Coach Michele Bartlett
Michele@thelighthousegroup.us

(Well, you can tell, it's clear as a bell, some words have two "Ls" – but not Michele! A little mnemonic to help you remember my screen name!)

Above content in italics and most pages following adapted from Co-Active Coaching, by Whitworth, Kimsey-House and Sandahl, copyright 1998 by Davis-Black Publishing.

Personal Information Fact Sheet

All personal information is confidential and treated appropriately.

Client Information:

Full name: _____

Name you like to be called: _____

Address: _____

Contact Information:

Home phone: _____ Work phone: _____

Message/mobile/pager/other: _____ OK to call at work? Y/N

Fax: _____ Email address: _____

OK to email at work? Y/N

Employment Information (if applicable):

Occupation (what you do to earn a living): _____

Employer name: _____

Personal Information:

Date of birth: _____ Marital status: _____

Names/ages of children, if applicable: _____

Significant Other's name/DOB _____

Special anniversary date: _____

Anything else you want me to know?

Individual Client Interview

What accomplishments must, in your opinion, occur during your lifetime so that you will consider your life to have been satisfying and well lived, with few or no regrets?

If there were a passion (secret or otherwise) in your life, what would it be?

What do you consider your role to be in your local community? In your country? In the world?

If you could devote your life to serving others – and still have the money and lifestyle you need – would you do it? How would it look?

If you trusted your coach enough to tell her how to manage you most effectively, what tips would you give?

If you had a five-year goal, a coach, and enough money to make it happen, what would that goal be? What difference would working with a coach make?

What is missing in your life? What would make your life more fulfilling?

Do you believe in God or a higher power? If so, describe the most useful and empowering aspects of your relationship to God. If not, what reference point do you use?

Strategic Planning Checklist

1. What is important for me to do this week?
2. What career or business issues need to be planned for or acted on?
3. What family member/friend/colleague/employee shall I connect with this week?
What will we talk about?
4. What birthday or special occasion do I need to plan for?
5. What else do I need to do?

Coaching Preparation Form

Preparing for the coaching session will allow you to optimize your results and our time together. Prior to the session, you may wish to answer the following questions:

How am I today, right now? How has my week been?

What do I want to get out of the call today?

What action did I take since our last session? What were my wins/challenges?

What do I have to report?

What do I want to be held accountable for?

What issues/challenges/concerns/achievements/areas of learning do I want to address deeply today?

What else?

Goals and Commitments

When you have a goal, there is a specific point in time by which you have either accomplished it or not. It is measurable and specific. A commitment is not measurable. It may have to do with the state or quality of *being* that you want to create in your life. “I am committed to having joy, self-expression, and community in my work” and “I am committed to being healthy” are both examples of commitments. Using the wheel of life exercise, identify your goals (with specific due dates) and your commitments:

	Goals	Commitments
Career		
Money		
Health		
Friends/ Family		
Significant Others		
Personal Growth		
Fun/ Recreation		
Physical Environ- ment		

Daily Habits

Small constructive actions done on a daily or routine basis can quickly give you a sense of accomplishment and keep you moving forward. These habits are the foundation on which major changes take place. Using your “Wheel of Life,” brainstorm some ideas for habits that, if incorporated into your life, would make a difference for you in one or more of the areas of the wheel. These habits can be professional or personal. Remember to include those things that will nourish you and provide satisfaction, such as spending time each day with children, a massage twice a week, calling one close friend a day, etc.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

You may want to build a spreadsheet with rows for each habit, and columns for 31 days. Call it your *Daily Habits Tracking Log*; make one for each of the next 3 months. If you really want to hold yourself accountable, develop a code label for each habit (make it simple: i.e., E30 for a half-hour of exercise) and enter these into your calendar – either electronic or paper. If you want me to hold you accountable, fax me this page at 303-697-2953.