



CLIENT PACKAGE

Client: _____

Date: _____

WELCOME TO COACHING!

Congratulations on your decision to focus time and energy on your personal and professional well-being and career and leadership development. I am excited to be working with you as you explore and realize the aspirations and dreams that take you towards your most fulfilling goals. I have described what I do as a coach in the following paragraphs to help you better understand the coaching process. This helps us to create the most effective collaboration.

Who do I work with?

Highly motivated individuals like yourself who are looking to move towards a fulfilling definition of success, balance and wellbeing.

How do I work with you to create the results that you want?

- By asking powerful and provocative questions, *which encourage you to think in new and exciting ways.*
- By providing challenges and brainstorming *to develop your creative goals and action plans.*
- By creating the structure, focus and support *for you to stay in action.*
- By helping you maintain accountability *towards reaching your goals.*
- By completely believing that *change is possible.*
- By fully trusting that you will succeed *in developing balance, wellbeing and success.*

How do we get started?

Our first session is known as a discovery session. It is an opportunity to jump start our relationship. During this session, we will be designing our alliance (how we will work together). In our discussion you can introduce me to who you are, what you wish for in your life, and what I am to hold for you as your vision. We will embark on some exercises that allow you to further explore what you feel are your core values, what goals resonate with you, and what you are expecting from coaching.



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What will I bring to each coaching session?

Full confidentiality is assured whether we are communicating in person, by phone, or by email. I guarantee that I come completely prepared and will bring my full attention, interest, curiosity and commitment to each of our sessions. By my use of open-ended and at times challenging questions, you will have the opportunity to think about your life/work in a creative and sometimes dramatically different way. I support you as you move towards your "Bigger Picture" with suggestions, requests and action steps. This provides you with a structure for focus and accountability. I will be direct with you and bring your attention to details that do not seem to truly resonate with you. Ultimately, the direction of our coaching is in your hands.

How can you most benefit from coaching?

Coming prepared to our meetings ensures that we use this valuable time in the most productive fashion. Spending time prior to our meeting brainstorming and writing down what you would like to discuss can stimulate our discussion down the paths that are of most interest and/or challenge to you. If you allow yourself to turn up with an attitude that considers possibility and is willing to embrace change, new perspectives and opportunities are able to appear. It is important that you are direct and honest with me, so that the process and outcomes from our coaching must be consistent with what is true and of importance to you. We will consider the following questions:

- **What is your Vision** - *Identifying the bigger picture*
- **What is your Mission Statement** - *Clarifying goals and priorities*
- **What are you already good at** - *Recognizing innate strengths, creativity and resourcefulness*
- **What are your challenges** - *Overcoming obstacles, such as indecision and procrastination*
- **How do you get started** - *Getting "unstuck" and motivated*
- **How do you think outside the box** - *Creating fresh, inspiring and exciting perspectives*
- **How do you have fun** - *Allowing curiosity and creativity to flourish*
- **How do you keep going** - *Accelerating progress and results*
- **How do you tap into fundamental strengths** - *Exploring self-leadership qualities*

I look forward to getting started.

Warmest regards,
Jackie Huntly



I hope that you find answering the following assessments and questions to be a motivating process. There is no right or wrong answer. These exercises give you a chance to think about what factors currently influence your life and work and where you would like to go in the future. They also assess your understanding of the coaching process. The questions are designed to stimulate your thinking in a way that will make our work together productive and fulfilling. (Please use extra sheets as needed)

CORE

How would you describe yourself in your entirety?

When do you feel most alive?

If someone were giving a speech about you now, how would they describe you?

What brings the most meaning and purpose to your life?



YOUR STORY

Who and/or what factors influence you the most from your past?

What are the ways they impact you?

Who and/or what factors influence you the most in the present?

How do they impact you?

Your Story (continued)

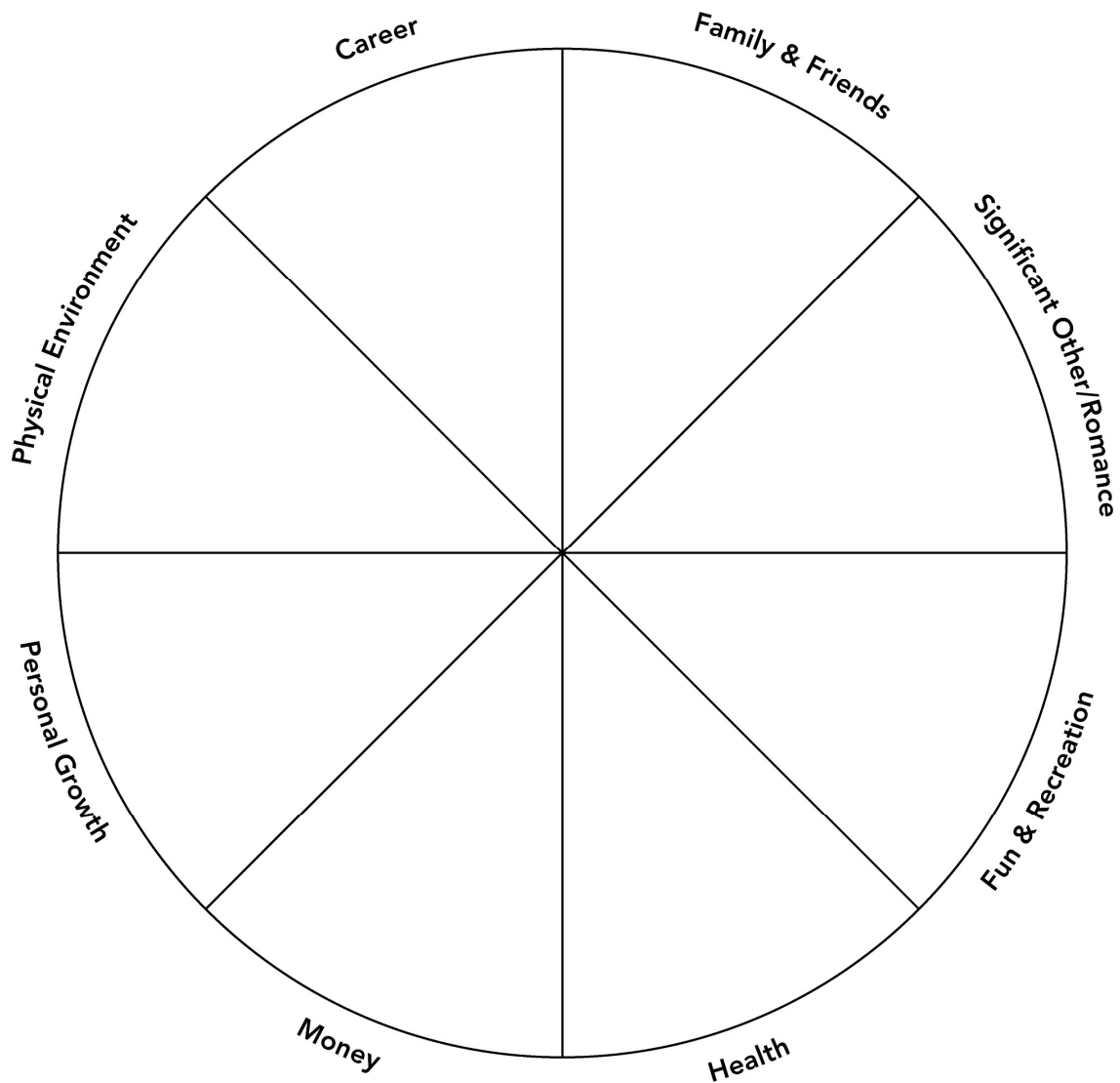
What have been the 3 greatest successes in your life?

What have been the 3 greatest successes in your career?

THE WHEEL OF LIFE (PERSONAL)

Directions

The eight sections in the Wheel of Life represent different aspects of your life. Seeing the center of the wheel as 0 and the outer edges as 10, rank your level of satisfaction with each life area and input the number in each of the areas.



PROFESSIONAL ASSESSMENT WHEEL

[Co-Active Training Institute (CTI)- Used with permission]*

This assessment contains eight areas that, together, represent one way of describing your professional life as a whole. This exercise measures your level of satisfaction and range of expression in these areas as a snapshot in time. As you work through this assessment you will find areas where you can acknowledge yourself for the success you have created and areas where you may want to improve your level of satisfaction. Rank each of the statements below on a scale from 1 (Highly Disagree) to 10 (Highly Agree), then total your scores for each area.

Recognition (1 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I feel valued and affirmed at work.
- ☐ I am appropriately compensated for the work I do.
- ☐ I acknowledge and appreciate others.
- ☐ I take time to celebrate my accomplishments and growth.

/ 40 Total

Satisfaction (2 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I am engaged in meaningful work.
- ☐ I feel vibrant and alive in my work.
- ☐ I look forward to going to work on Monday morning.
- ☐ I have energy at the end of each day to attend to the people I care about and my personal interests.

/ 40 Total

Creative Self-Expression (5 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I feel I make a unique contribution through my work.
- ☐ I give myself permission to take risks, experiment, innovate and create things "outside the box."
- ☐ I see challenge as an opportunity to expand and engage.
- ☐ I have opportunities to engage my strengths every day at work.

/ 40 Total

Results (6 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I produce high quality results.
- ☐ I am reliable and consistent.
- ☐ I use my influence to impact the day-to-day success of the company.
- ☐ I accept responsibility for my successes and failures.

/ 40 Total

Professional Assessment Wheel (continued) – [CTI-Used with permission]

Relationship (3 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I establish good relationships with others.
- ☐ I design effective alliances with others.
- ☐ I respect my colleagues and the work they do.
- ☐ I cultivate trust in others.
- ☐ I empower leadership in myself and others.

/ 40 Total

Communication (4 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I communicate clearly with my colleagues, supervisor and leadership teams.
- ☐ I value listening as much as I do speaking.
- ☐ I am thoughtful about the impact of my communication.
- ☐ I make direct requests rather than communicating requests indirectly or through gossip or complaint.
- ☐ I communicate for the sake of something larger than myself.

/ 40 Total

Career Development (7 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ I take responsibility for the evolution of my career path.
- ☐ I use everything that occurs as an opportunity to grow.
- ☐ I look for ways to expand my responsibility.
- ☐ I have a champion at work who encourages my development.
- ☐ I invest time and energy to develop myself as an individual, in addition to developing my career skills.

/ 40 Total

Climate & Culture (8 of 8)

1 (Highly Disagree) to 10 Highly Agree)

- ☐ The company culture and mission aligns with my personal values.
- ☐ I foster a positive environment.
- ☐ I champion my organization and the people who work there.
- ☐ I create a physical environment that supports my work.

/ 40 Total

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Professional Assessment Wheel (continued) - Courtesy of coactive.com

Directions: To get a snapshot of your life, transfer your total scores from page one and two to the summary Wheel and find the % of the total for each area. Then take that percent and draw a line in the respective area on the Wheel. Look at your completed Wheel. If your professional life is riding on this Wheel, how bumpy is the ride? Answer the questions below to help you expand your satisfaction and balance.

Recognition /40 = []%

Satisfaction /40 = []%

Relationship /40 = []%

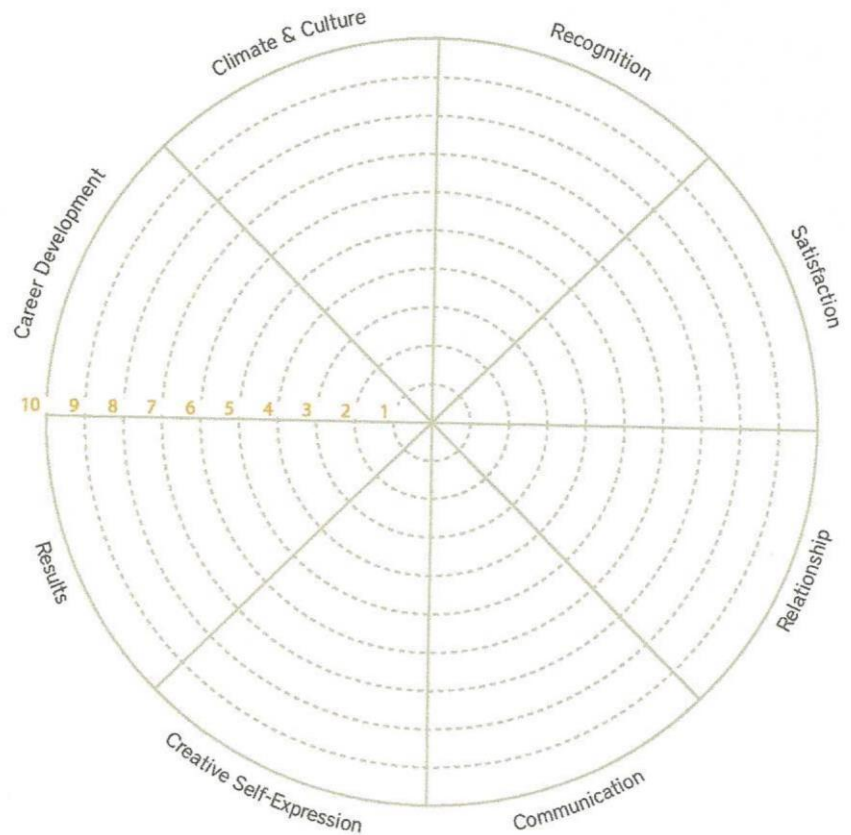
Communication /40 = []%

Creative Self-Expression /40 = []%

Results /40 = []%

Career Development /40 = []%

Climate & Culture /40 = []%



What area on the wheel would you like to improve your level of satisfaction?

What is the current state of this area in your professional life?

What is missing or not working for you in this area?

What would you like to create in this area?

VALUES WORKSHEET

Identify 10-20 values that are most important to you (this list is not comprehensive, so feel free to add others), then rank them in order of importance.

Now rank your top 5 out of the above.

In addition, you can decide which values are absolute (i.e. which are non-negotiable and which are more negotiable). Remember that some values may change over time.

Value	Order of Importance	Negotiable / Non-Negotiable
Family		
Joy		
Friendship		
Integrity		
Honesty		
Nature		
Reliability		
Conscientiousness		
Humor/Fun		
Kindness		
Love of God/Faith		
Legacy		
Contribution		
Solitude		
Peacefulness		
Activity		
Involvement		
Equality		
Self-Expression		
Order		
Tradition		
Security		
Adventure		
Authenticity		

Value	Order of Importance	Negotiable/Non-Negotiable
Civility		
Curiosity		
Inventiveness		
Exploration		
Recognition		
Leadership		
Learning		
Creativity		
Philanthropy		
Service		
Lightheartedness		
Integrity		
Honesty		
Freedom to Choose		
Independence		
Achievement		
Beauty		
Autonomy		
Balance		
Commitment		
Community		
Intimacy		
Freedom		
Free Spirit		

Value	Order of Importance	Negotiable/Non-Negotiable
Openness		
Personal Growth		
Relationship		
Sensuality		
Spirituality		
Trust		
Vitality		
Wholeness		
Nurturing		
Excellence		
Loyalty		
Elegance		
Peace		
Collaboration		

Values Worksheet (continued)

1. How do your top 5 values show up at work?

2. How do your top 5 values show up at home?



IDEAL JOB DESCRIPTION

1. Write description of Ideal Job

Include:

- Impact that you want to have
- Challenges that you want to meet
- Rewards that you desire
- Relationships that you want to have
- Job progression that you anticipate
- Location
- Number of hours and days that you want to work
- Environment that you want to work in (all details)
- Financial compensation that you want
- Other details

2. Detail current financial picture.

(See a financial planner if you need to)

3. List current and desired hard skills for job.

(As they pertain to professional competence)

4. List current and desired soft skills for job.

(Use list)

5. List values.

(Do Values Exercise)



CHARACTER STRENGTHS

Courtesy of – VIA Institute on Character

Character Strengths are the positive parts of your personality that impact how you think, feel and behave. Scientists have identified 24 character strengths that you have the capacity to express. By taking the VIA Survey you will discover your unique character strengths profile. Knowing and applying your highest character strengths is the key to you being your best self.

<http://viacharacter.org/character-strengths-via> (right-mouse click on link to open website in a new window or tab)

SOFT SKILLS ASSESSMENT

Put a "checkmark" by those skills you feel are your current strengths.

Don't "checkmark" the skills you would like to acquire.

Communication:

- ☐ Listening
- ☐ Non-verbal Communication
- ☐ Writing
- ☐ Feedback
- ☐ Public Speaking
- ☐ Curiosity
- ☐ Clarity

Interpersonal Skills:

- ☐ Empathy
- ☐ Conflict Resolutions
- ☐ Relationship Management
- ☐ Humor
- ☐ Negotiation
- ☐ Compromise
- ☐ Explore Connections

Inner-Skills:

- ☐ Self-Awareness
- ☐ Mindfulness
- ☐ Emotional Self-Management
- ☐ Resilience
- ☐ Flexibility
- ☐ Curiosity
- ☐ Enthusiasm
- ☐ Positivity
- ☐ Perspective-Taking
- ☐ Possibility
- ☐ Self-confidence
- ☐ Self-efficacy
- ☐ Assertiveness
- ☐ Stress Management
- ☐ Life-long Learner
- ☐ Energy Management

Soft Skills Assessment (continued)

Put a "checkmark" by those skills you feel are your current strengths.

Don't "checkmark" the skills you would like to acquire.

Creativity:

- ☐ Non-linear Thinking
- ☐ Reframing
- ☐ Design
- ☐ Experimentation
- ☐ Imagination
- ☐ Open-minded
- ☐ Artistic
- ☐ Inspiration

Professional Skills:

- ☐ Work Ethic
- ☐ Time Management
- ☐ Organization
- ☐ Planning
- ☐ Collaboration
- ☐ Listening
- ☐ Delegation
- ☐ Diversity Awareness
- ☐ Cultural Awareness
- ☐ Meeting Management
- ☐ Respect
- ☐ Ethical

Leadership:

- ☐ Team Building
- ☐ Respectful
- ☐ Motivate
- ☐ Inspire
- ☐ Vision
- ☐ Goal-setting
- ☐ Clarity
- ☐ Courage
- ☐ Integrity
- ☐ Fair-minded
- ☐ Analysis
- ☐ Decision-making
- ☐ Delegation
- ☐ Feedback
- ☐ Humility
- ☐ Emotional Intelligence
- ☐ Conflict Resolution
- ☐ Agility
- ☐ Mentoring
- ☐ Management Skills



Top 5 Professional Interests:

Top 5 Personal Interests:



VISION

If time and money were not a concern, describe the things that you long to do.

What needs in the world are you moved to meet?

What is the impact that you want to have?

How would you define success?



Vision (continued)

Think about people who truly inspire you. What is inspiring about them?

What kind of people would you like to surround yourself with?



VISION STATEMENT

I am the _____ (metaphor) that/who

_____ (impact statement).

Commitment (0-10):

0 _____ 10

Confidence (0-10):

0 _____ 10



BLUEPRINT

What would you overall like to change about your career?

What would you overall like to change about your life?

What steps could you take immediately to move forward?

What stands in your way of creating change (Saboteurs and Limiting Beliefs)?



PRIMARY FOCUS

Please identify five areas that you would like to be your main focus during the time that we work together in this coaching relationship. Provide a simple heading for each area, followed by a brief description of what would be the measurable outcome.

1.

2.

3.

4.

5.

BELIEFS

On this page list the beliefs that you hold about your work and life. It might be habits that you have; how you view your work, etc. (eg. I always procrastinate).

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Energy / Time Management Assessment (Personal)

This worksheet is an assessment that offers you a comprehensive view of how you are spending your energy and time during your day. This information is a tool to help you to decide where and how you might want to make some changes.

- The first column, Activity, needs to be any activity of note that you are doing during your day. The second column assesses on a scale of 0-10, how much energy you gain (+) and/or lose (-) doing this activity.
- The third column assesses on a scale of 0-10 how this activity contributes towards fulfilling your Vision.
- The fourth column assesses on a scale of 0-10 how necessary this activity is in your personal or professional life. Is it something that needs to be done?
- The fifth column assesses on a scale of 0-10 how important this activity is to you.
- The sixth column assesses what percentage of your time you spend doing this activity.

Activity	Energy (0-10) Expended (-) Gained (+)	Fulfills Vision (0-10)	Necessity (0-10)	Importance to You (0-10)	Time (%) (0- 100)

Energy / Time Management Assessment (Professional)

This worksheet is an assessment that offers you a comprehensive view of how you are spending your energy and time during your day. This information is a tool to help you to decide where and how you might want to make some changes.

- The first column, Activity, needs to be any activity of note that you are doing during your day. The second column assesses on a scale of 0-10, how much energy you gain (+) and/or lose (-) doing this activity.
- The third column assesses on a scale of 0-10 how this activity contributes towards fulfilling your Vision.
- The fourth column assesses on a scale of 0-10 how necessary this activity is in your personal or professional life. Is it something that needs to be done?
- The fifth column assesses on a scale of 0-10 how important this activity is to you.
- The sixth column assesses what percentage of your time you spend doing this activity.

Activity	Energy (0-10) Expended (-) Gained (+)	Fulfills Vision (0-10)	Necessity (0-10)	Importance to You (0-10)	Time (%) (0- 100)

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What do you love?

What is the impact that you want to have?

What are you good at?

What can you be paid for?