

Coaching Fulfillment

Fulfillment coaching tools —Life Purpose, Captain and Crew, Saboteur — are powerful in many kinds of coaching situations. One simple approach is to have your clients take a look at their values, identify a value they'd like to honor more fully in their lives, and create homework assignments to move them in that direction. What makes this kind of coaching effective is to get the client into the experience of the value they'd like more of rather than just talk about it. What you're looking for here is — you guessed it — resonance.

Fulfillment is about who your clients are becoming, and a big part of that hinges on the action they take along the path. Let's say your clients have something they want to do (like a slice of their life vision) or something they really do need to do (like do their taxes before April 15th). And they're just not getting it done. On the "wanna do" stuff, one or more Saboteurs may be whispering or bellowing messages supporting the status quo. On the "gotta do" front, the thing may feel so flat — like such a chore — that it has no life in it at all and the very thought of it sends the client to the couch for a nap. (Believe us, the Saboteur probably has a hand in this, too.) The result in both cases is that the action is missing.

Here are some of the ways Fulfillment coaching can come into play. Let's look at the want-to piece first. You might want to approach this with your client as if it's already accomplished. "Okay client, you finished your book and a publisher accepted it... what do you have now? What values have you honored? What Saboteur voices did you have to set aside in order to accomplish this? What does your Captain have to say? The point is to get the client so grounded in the vision of what's possible and resonating with the deliciousness of what it will be like to make this happen, that the "doing" part almost becomes a foregone conclusion — how can they not?

The same basic approach applies to "gotta do" situations. Maybe the issue without zing is the scary mess in the attic or learning how to use all that software on the new computer. These typical examples — and many others — can be transformed into the means for the client to experience a more fulfilling life. Helping the client make that shift is your job, coach!

These situations don't have to be odious slogs. The question to ask is, "Client, what would have you get out of bed looking forward to working on this?" The key is to find the ways that completing this task would fulfill the client's deep-seated values. As long as it's a "should," the client is likely to seek ways to avoid it. "Should" is often a clue that the Saboteur is the gatekeeper on this. You can almost see its wagging finger — Do your taxes! Floss your teeth! Lose 15 pounds! Not to mention all the judgment lurking right behind the curtain — You're a hopeless procrastinator! What's the point of flossing when your whole family has bad teeth? You'll always be fat, so why try? Hmmmm. Motivating, isn't it?

So the alternative is to look with the client into the values honored by completing the task and then find ways to keep that vision alive as the client goes to work.

Here's an example. Let's say your client loathes grocery shopping to the point where there's no food in the fridge and she's shaking the toaster for crumbs. You might ask, "What happened to your value of self care, client? If you could make grocery shopping a radical self care experience, what would it look/smell/feel like? How could you make it ten times more luxurious than that? What does your Captain have in her larder. If your cupboards and refrigerator were fully stocked, what would you have? In what way would total deliciousness support you in who you are becoming? What is a structure that will help

you take this vision of delicious abundance to the supermarket with you — as soon as we hang up?” Again, the notion is to create aliveness by linking the task to the client’s fulfillment.

Fulfillment coaching is much more than finding a positive spin on things. It’s linking the action to the internal core, the true heart of the client that is motivated to create a rich, full life. And if it turns out that the task can’t actually be linked to the clients’ key values? Well, then, that might be an important clue this action item doesn’t belong on the client’s To-Do List after all.

Coaching Life Purpose (or Working with Clients on a Life Purpose Statement)

Coaching clients to find a Life Purpose statement is an ongoing process of excavation and self discovery, which begins with the Life Purpose statement. “On purpose” has a resonance to it. It is a strong chord that reverberates. “Off purpose” is discord, dissonance. The Life Purpose statement is like a tuning fork that helps clients remember who they are when they are on purpose and the difference they make in the world.

We view Life Purpose as more than vocation. The career people choose is often an expression of their Life Purpose but we are more than our work. So Life Purpose is also more than a personal mission statement or a career goal.

As Co-Active coaches, want clients to get in touch with the impact they have when they are on purpose. The goal here is for clients to feel the internal experience of being on purpose. From this internal experience, clients begin to put together words that express their sense of the impact they have when they are on purpose. Notice that clients do not have to learn how to be on purpose; they already know that. Life Purpose is not something they aspire to or learn how to have, they have it inside already. This coaching helps clients clarify what that is; we help them find words.

Steps in creating a Life Purpose statement:

- Take the client on a Guided Inner Journey. These inner journeys can be relatively short — they are not usually the same as a guided meditation. Just have your client relax and close their eyes for a moment. Then simply read them several Guided Inner Journeys. Have your client take notes between each one. Click on this link for examples of [Guided Inner Journeys](#).
- Have your client share about what came up for them in the inner journeys. Pay attention to the words the client uses and reflect them back — these words have special power and can deepen the resonance of the experience.
- Combine the words of your client with your own intuition to begin to craft a rough draft of a Life Purpose statement. In the format of Life Purpose statement we use, we also ask clients to find an image, a metaphor, a symbol of some kind that captures who they are and when they are living their life on purpose.
- Continue to work with your client over time to deepen their Life Purpose statement. Have them pay attention to images and metaphors that emerge in their day to day life and let the Life Purpose statement evolve over time.

The most memorable, and therefore effective, Life Purpose statements are concise and powerful. Here are some examples:

- I am the lighthouse that guides people home.
- I am the crashing wave that sweeps away barriers to aliveness.
- I am the lightning that rolls the thunder of change.

Fulfillment and the Captain and the Crew

Part of the fun — and an essential role of being a coach — is challenging clients to imagine the possibilities beyond the limits they've imposed, beyond what they think of as "realistic." Instead, have them create from abundant possibility. So, for example, in the realm of fulfillment we ask clients questions like, "What if it were your ideal situation... what would it look like?" or "If it were as good as it can get, what would it be? And if it were twice as good as that, then what?" The radical fulfilling picture invites clients to go outside of the current box, past the range of the tractor beams of their old story and into the territory of fresh creativity. Another way coaches can break this force of gravity is by projecting into the future, over the horizon, past the influence of this time and place. For example, you might ask, "Let's imagine that it's a year from now (or six months, or five years). This issue is resolved. You're happy and deeply satisfied. What did you do? And who did you have to be for that to be true?" The projection into the future allows clients to disconnect from the bonds of this time and fly.

The Captain and the Crew

Within each of us lies a vast array of resources... everything we need to manifest the fullest expression of our purpose and our destiny.

However, it can be challenging to access these internal resources. So often, the voices of the Saboteur are loud and dominate. Shouting to the rooftops about this issue or that problem, the Saboteur voices drown out the calm whispers of our internal allies. It takes patience and commitment to be able to hear and to follow the quieter voices of our true self. The decision to live our lives from this place of resonance, from the inside out rather than the outside in is truly a radical act. This is the essence of Fulfillment.

The Self is a complex constellation of many different voices, many different "selves." Personification of specific energies allows us to access whichever energy is most useful in any given moment.

There are many models for differentiating and accessing these internal resources. Our particular approach features your Inner Leader or Captain and five Crew members. To begin your journey, we've provided a Captain and Crew Chart. This Chart has room for you to list your Captain and five Crew as well space to add additional Crew members of your own creation and design. We encourage you to do so. Have fun!

The more you use your Captain and your Crew, the more alive and real they will become. Imagine a cabin nestled deep in the woods. With each visit, the path to the cabin becomes more defined and therefore easier to find. Become intimate and familiar with your Captain and Crew by using them often as resources. Your Captain and Crew are always available and you can access them whenever you wish... whenever you need guidance, wisdom, encouragement or support.

Fulfillment and Values

In its simplest expression, a fulfilling life is one in which important values are honored each and every day. Those questions we posed at the very beginning of this manual all point to values. Remember your Co-Active® Coaching Fundamentals course? There was an exercise when you were asked to find a peak experience, a time in your life when you felt fully alive, resonating with your world like the vibration of a tuning fork when you strike a strong, clear note. Who, if anyone, were you with? What were you doing? By mining this one experience, you can uncover a number of important values.

In this Fulfillment course we introduce a variety of techniques — including “peak experience” — for helping clients discover their values. We sometimes call this process “values clarification.” It’s important to note that the values are already there, inside the client. They are not ideals to be worked on or acquired; they are expressed in the living of a person’s life. If they are important values and they are NOT being expressed in the person’s life, dissonance will show up. Maybe it would be more useful to call this process “values discovery” or “mining” or “unearthing,” because the process we go through is designed to help clients experience their values as opposed to analyzing them or listing them as words on a page. The more clients feel their values as part of their internal being, the more they can make choices based on those core values.

For the coach then, this process heightens your Level 3 listening skills because clients are so close to their own experience that they really need a coach to help them notice when the tuning fork of their life is resonating — or not, to notice when the light is brightening — or dimming. Whatever image works for you, your role is to be aware of the aliveness in your client.

Because values are so personal and sometimes difficult to articulate exactly, we recommend using word strings. For example, many people might choose freedom as a value. For one person it might be freedom/independence/adventure and for another person it might be freedom/self-expression/outrageous creativity. Same starting point, but very different meaning, so it’s important for you, the coach, to stay curious and dig deeper. We also encourage looking for those expressions that are personal. Standard values lists can be almost useless. Values like “coyote” or “cinnamon/chenille/candlelight” don’t show up on those lists. You might not have a clue what they mean to your client and the good news is, you don’t need to. Your job as coach is to keep mining, looking for jewels that make the client’s life light up.

Most likely you will begin the values clarification work at your initial discovery or intake session with your clients. It’s important to remember that this work just starts the process. Clients are living their values or not, every moment of every day of their lives. Values may not be visible, but the effect and impact are very visible. In an ongoing coaching relationship, there is ample opportunity to continue mining for values, polishing what you both found before and uncovering those hard to expose invisible values — the ones that are so much a part of the air the client breathes that they aren’t often noticed at first.

As clients gain more clarity about their values, the values serve as guideposts on their journey. Challenging decisions become clearer when the coach asks values-based questions. “Will this decision honor your values? What values will you honor by choosing A or B? What values would your Captain take a stand for in this situation?”

Guided Imagining to meet your Captain

The Captain is your internal leader, your Inner Authority, a visionary who is in command and leads all parts of your self towards the fullest expression of your Life Purpose. There are no rules about your Captain being masculine or feminine, human or animal, with a physical form or not. The key attributes of your Captain are: **Wisdom, Compassion, Courage, Clarity and Certainty**. The Captain has access to all the wisdom that ever was, has been there and back, and knows that ultimately everything turns out just fine. Your captain loves you completely and unconditionally and no matter what happens, holds you tenderly with gentleness, infinite compassion, and heart. Your Captain believes in you completely and without question, is grounded and can see quickly what is needed and how best to move forward. Your Captain is fearless and relentless in pursuit of the very best for you. Your Captain's will is unshakable, dedicated and unwavering.

Know that the Captain has always been part of you and is eager to be more available to you.

If you haven't already, find a comfortable position so you can relax and take a short journey to meet your Captain. Take a deep breath, as you release that breath let yourself relax.

Notice where you might be tense... breathe into that place and let that tension go on the exhale and relax.....

Another breath now, letting go..... As you relax, let your imagination go..... let it take you to a place that is completely safe..... just make it up, sense it or see it. It is all fine..... (Pause)

As you imagine this place, look around. What do you notice? Whatever you see, imagine or sense is exactly as it should be. Wherever you are, notice what is around you. Sense or see the details... take in the colors, the sounds..... you might want to touch something.... What are the smells here? Let it all come so alive you can almost taste it. (Pause)

As you walk around and get to know this safe place, you hear the sound of someone approaching.....there is a sense of excitement in the air. You are about to meet someone special.....and now... they come into view.....Your Captain walks toward you, eager to meet you as well.

As your Captain approaches, notice...

What does your Captain look like? What stands out about your Captain? What's it like being with your Captain?

This is the Leader within you... your Inner Authority... Your Captain...Greet one another. Notice what it's like? Feel into and notice: What does the energy of your Captain feel like? Your Captain has always been here and now you have access to each other in a new and conscious way.

Now, find a place in this safe space to be with each other for a conversation... Sit down and get comfortable or you might go on a walk together or look out at the view.... Simply find a place to be with each other and have a conversation with your Captain.

Ask the following questions and listen carefully for the answers:

What is important for me to know about you? (Pause)

What do you want for me? (Pause)

What do you know about my Life Purpose? (Pause)

How can I connect easily with your wisdom and your strength? (Pause)

Lastly: What is the name by which I will call you? (Pause)

Notice, they have a gift for you. Receive their gift. What is it? What do you notice about it? Ask them:

What would you like me to know about this gift? (Pause)

And now, we'll be drawing this meeting to a close. This is a time to thank each other... knowing you can be with your Captain any time you choose. Your Captain is here for you to support you in your journey of living your life purpose.

Now, take a deep breath, breathing in this experience, remembering what you need to remember. Another breath, returning to this space and time.... another deep breath. Open your eyes, stretch, move your body a little.

Maintaining silence, take a few notes about this experience

Guided Inner Journeys to Create a Life Purpose Statement

These Guided Inner Journeys provide the client with raw material from which to generate a Life Purpose statement. When delivering these to your client, speak slowly and clearly and allow space between the words. Not all imagery will resonate for your client so it's a good idea to deliver several journeys in sequence, allowing time for your client to take notes between each one.

Guided Inner Journey #1

Turn the clock back and look at a time in your life when you felt your full power – a time when your spine, arms, and fingertips were tingling with excitement, a time when you simply didn't care what anyone thought of you. You were absolutely alive! (Pause)

Questions:

Where were you? What were you doing? Who was around you? What was occurring in them at that time?

What was your impact on them?

Guided Inner Journey #2

You've been given a billboard and can put any message you can on it. Thousands of people will drive by and see your billboard each day. What does it say?

Guided Inner Journey #3

You are getting into a rocket ship. The rocket ship takes off. You are on your way to an undeveloped planet in the universe. It's a fine planet in every way, but it's uninhabited. You can create this planet however you want it to be created. You have the power to have it be any way you want. When you land, what is it that you're going to make happen -- what's the impact you want to have, that's going to create the planet the way you want it to be? (Pause)

The ship is landing on the planet. The door opens. You touch the planet and say, "It's going to be this way." What is "this way?"

Inquiry

An inquiry is a powerful question that is so open-ended it could take a week for the client to ponder its many answers. Isn't that a coincidence? The inquiry is a special form of powerful question typically given to clients as a homework assignment. Their assignment is to work with that inquiry between coaching sessions, looking at the question and answering it from as many different directions as possible. Day-by-day, the inquiry can bring to the surface new insight. Some typical examples are, "What are you tolerating in your life? What's missing? What is there to celebrate today? or What's important about that?"

Some coaches create an inquiry in the moment with their clients — an inquiry that captures the direction the client is looking during the coaching session — as a way to keep the search going. Sometimes the client is in the land of internal exploration and the best way to keep exploring is by using the power of an inquiry. In some cases, coaches simply pick an inquiry for the week and invite all their clients to explore that one provocative question. Use the approach that works best for you and your clients, naturally.

Nine Ways to Work with the Client and NOT the Saboteur

1. Simply acknowledge or name the Saboteur.

"I am hearing a Saboteur that says you can't ask for what you want because you will jeopardize your job. Is that Fred speaking?"

...and be sure to have clients separate themselves from their Saboteur.

"Now that we have heard from your Saboteur, what do you think?"

2. Ignore the Saboteur. Do not interact with it.

For example, you request that your client exercise five times this week. The client responds with excuses. You say "I hear you, and I also know you want to feel energetic and to lose 10 pounds, so will you exercise five times this week?"

3. Give the Saboteur a job to do or a place to go.

"I hear your Saboteur has you right now. How about if you ask the Saboteur to take a trip? Where would you like to send him/her?"

"I have an idea, how about we give the Saboteur a job — what would you like him to do?"

...and direct the Saboteur:

"How about sending your Saboteur to Hawaii for the rest of this session. He sounds like he has been working hard all week and could use a vacation."

"I have a job for your Saboteur... send her shopping for books to help you with this situation while we talk."

4. You, the coach, talk to the Saboteur and manage it for the client.

"Mary, I am going to talk to your Saboteur here for a moment. Josephine, I gotta tell you, Mary is acting in her best interest. She's headed towards her dream here. Spending two hours a week writing is not going to cost her relationship with her daughter or her husband. We will look at how she can spend time with them and I'm asking you to BACK OFF."

5. Ask the client to talk to the Saboteur and move it out of the way.

"Joe, we have heard quite a bit from your Saboteur on this subject today. What do you want to say to the Saboteur that will have him step back and let us talk?"

6. Have your client personify the Saboteur. Give the Saboteur a name and a life of its own.

“Diane, who is this Saboteur speaking today who says you will mess up if you try a new way? Let’s give it a name. Now tell me about Frieda. What is she like? How is she different from your Captain?”
7. Talk to the client about his/her values. Ask what values are being honored or dishonored. This often has the Saboteur disappear.
8. When you are hearing complaints or concerns from the Saboteur, ask the client about his/her vision.

“What do you want?” or “Imagine this situation one year from now; how do you want it to be?”
9. Bring in the client’s Captain.

Powerful Questions

Every question sends a client somewhere to look for an answer. That's the power in the coach's role of asking questions; your job is to send the client to a place where they discover things they've never thought of or felt before. If all they're doing is telling you what they already know, or filling you in with background, the coaching has stalled. Co-Active® Coaching is about the client's learning and action, not the coach's. You probably need a lot less information, story and background than you think.

Powerful questions are provocative and open-ended. They send the client to new territory. They are inherently curious — on the client's behalf. Watch when you are asking curious questions for your own benefit or understanding. You do not have to understand the situation well enough to solve the problem. That's the client's job. Your job is to be really, truly, child-like curious.

Notice when you are nodding in agreement with your client's underlying assumptions. Is that really so? Get curious. Challenge everything. Take nothing for granted.

Closed-ended questions stop the looking. They come to a conclusion. Sometimes they ask for permission or clarity, which is perfectly okay. "Are you ready to move on?" is a question for clarity. It's one of those "yes/no" questions that are sometimes appropriate, even necessary. But watch when you find yourself in the habit of asking yes/no questions often. It can be a sign that you still need permission from the client or yourself to be more direct. Assume that the contract — the designed alliance between you and the client — gives you that permission. It's what the client is paying for. For example, when you ask, "Is this relationship honoring your values?" some clients will understand your intention and go right to a description of how the relationship is and isn't honoring their values. But the question invites analysis; it can bring on the client's need to explain, rationalize and defend. It's as if the prosecuting attorney asked the question, rather than their coach.

The powerful question might be, "In what ways does this relationship honor your top five values? What values are not honored in this relationship?" This approach is more direct and is inherently more powerful. For some of the same reasons, another question to use sparingly, and with intent, is the "Why" question. These questions also have the tendency to send clients to explanations and rationale. It's likely that their Saboteurs have prepared them to answer the defensive "why" questions.

Saboteur

As clients step forward to change their lives, an inner alarm goes off. Homeostasis — or the tendency to maintain the system — is a strong, universal force and your clients' plans to make changes in their lives will certainly tilt the well-oiled machine. All of us have a self-sabotaging inner voice — or voices! — that hold us back. Preserving the status quo is part of this Saboteur's job. So, it's no wonder that when clients contemplate moving forward in a big way, it wakes up the Saboteurs. The bigger the dream, the more hefty the Saboteurs become that you will be wrestling with.

Sometimes called the "Inner Critic," "Negative Self Talk" or the "Committee," the Saboteur has all the reasons ready for why this plan (whatever your client has in mind) is a stupid, dangerous, hopeless or otherwise ill-advised course of action. The Saboteur is particularly adept at taking a small piece of the truth and fabricating it into the blanket reason for stopping, or never starting.

As a coach, you want to be alert to warning signs that your client's Saboteur may have taken control of the voice box. Often it's a sense of circling the issue, round and round and round. When the Saboteur is present, clients sound like they are building a case, or defending their decision. It is heady; there may be a flatness, a smoky, foggy feeling of being lost in a haze of arguments. When things seem unnecessarily complicated, it is often the Saboteur weaving ankle snares to trap the client in a web of confusion. If you notice yourself battling with the client, check to see if you are actually battling with the client's Saboteur. Above all, when the Saboteur is speaking, you will notice a dissonance that is the very antithesis of the resonance associated with experiencing a value.

For coaches, there are two general approaches for working with the Saboteur once you've identified its presence in your client's conversation. (However useful these tools may be, please remember that the foundation of successful coaching lies in making sure that you are interacting with your powerful client and NOT with the Saboteur. Your client is ALWAYS stronger, smarter, and more resourceful than his or her Saboteur.)

1. Presence the Saboteur more fully by asking your client to personify it. Who is speaking here? What is this voice saying? How would you describe this voice? The client can even describe the Saboteur's appearance, character, personality, and agenda — casting all the aspersions he desires. Once it becomes really clear that the client and the Saboteur are NOT one and the same, have the client choose who's going to be boss here. And yes, coach, on this one you get to have a vote!
2. Defuse or bypass the Saboteur by orienting the client toward his or her Captain and Crew, values, and/or Life Purpose — all of which have a stronger pull on the client than the Saboteur does.
 - Look for that small piece of what is true about what is being said and acknowledge it as one of a myriad of factors; don't let it kill the whole idea.
 - Look for the positive intent buried in the client's Saboteur voices. At some level, the Saboteur's job is to keep your client from doing something perceived to be dangerous or unwise. What is the risky part in this move? Bring that to the light of day without all the drama.
 - Point clients to their values. When clients stand in the place of what they deeply value they are resolved, grounded. There is a radiance in this place, a light that is too bright for the Saboteur.

- Enlist the strength of the client's Captain and Crew. They clearly see the separation between the true self and the Saboteur's story.
- And you can always ask the client, "What is the REAL truth here, not the Saboteur's version?" Clients do know; when they check inside for the truth they almost always find that it's right there.

Six Ways to Clarify Values

Captain

Have your client identify the values that showed up in the Captain visualization.

“I notice as you speak about the inner journey that nature and the ocean play a big part. What value of yours does that express?” or “Let’s ask Mountain about his top values.”

Peak Experience

Ask your client to describe a peak experience and listen for the values that show up in the story (see “Discovering Client’s Values” on the Fundamentals Learning Hub for further explanation).

Suppressed Values

What makes us angry, frustrated or upset is often something that is contrary to a high value. In other words, it’s a value that is being suppressed. The key is to point out to the client that most upsets are clues to values that are being suppressed.

For example, getting stuck in commuter traffic frustrates your client. He becomes antsy and angry. When asked what makes him angry, the client replies “I have no control, I’m trapped.” The coach then says, “If we flip that over (look at the other side) it sounds like you have a value of freedom. Is that right?”

Invisible Values

These values are invisible to the client. The values are being honored naturally so the client doesn’t think about them much. Because of their invisibility, it may be difficult for the client to spot them. As coach, look at your clients: Are they orderly and put together? Do they express creativity in how they dress? How are they at honoring their agreements with you? All of these things point to an expression of the client’s values.

Must Haves

Ask clients to look at what they must have in their life. Beyond food, shelter and community, what needs to be in clients’ lives to have them feel fulfilled? Adventure? Partnership? Accomplishment? Nature?

Obsessive Expression

We all are capable of obsessive behavior — insisting on honoring a value as a demand. For example, everything must be in its place to the point of perfection. When we insist on something — my way or the highway — there is a good chance there is a value being expressed in the extreme. Ask your clients to look for places they may be taking a value to the extreme. Another place to look is to the feedback clients get from friends and family. For example, your client often hears: “You are so controlling. You hog all the attention.” These statements might point to a value of leadership or recognition.

What is Fulfillment?

What fills you up? What nourishes you? What gets your blood going? What's the fizz in your ginger ale? When you are most alive, who are you? What are you doing? Who are you with? What's happening around you at that moment?

Most people are never asked questions like that. They are too busy trying to untie the twisted knots of their lives to get at what they hope will be the magic treasure inside.

Clients often come to coaching with plans and goals for escaping the prison they've found themselves in. They've been digging tunnels looking for a way out. Clients come to coaching short of breath from running after their lives, trying to catch up or get ahead so that someday they can have the life they really want. It's the life they are planning to have... as soon as (fill in the blank) the house is paid for, the kids are in college, they find the career (or partner) they love, this current misery ends, they find out what they want, their organization becomes enlightened. Clients are living their lives while holding their breath.

Even with good intentions and a goal, people often have great difficulty making things happen. That's partly because they've focused on the goal as the means of fulfillment: the thing, the answer, the solution, is invested with the power to grant fulfillment or happiness. Actually, this puts the emphasis in the wrong place; fulfillment is not something you can get or own. It is something you must live.

Another challenge to finding individual fulfillment is the demanding world that surrounds our clients and us. We are all pulled in 40 directions at once by expectations of others and current responsibilities. To make it even tougher, we are sometimes dragged down by voices in the dark saying things like, "You don't deserve it. Why try? You'll just mess it up anyway. It's too risky. Who do you think you are?"

We believe it is possible for people to have fulfilling lives today, right where they are, even as they make plans to transform and evolve.

It starts with answers to questions like those at the top of this page — it starts with knowing what you want out of life. That's a big step for lots of people. Lots of our clients have never really asked themselves that question, not at the deepest level. "No, really. What do you really want in your very own life? You get to make it up from a blank page."

To actually claim that life means breaking free of boxes that may have become quite familiar and neatly decorated, lined with the soft illusion of safety. These boxes may look comfortable, but so do those cushy, satin lined coffins.

Living a fulfilling life is a radical act. We all live in a world that favors, supports and provides incentives for going along to get along. Honoring who we really are can mean making difficult choices. In the end, however, we believe that Fulfillment is worth the challenge. At the end of the day, we believe people want to say they went after their dreams, they sought out and nourished robust, life-giving relationships and they fulfilled their purpose in their own unique way. Justice Oliver Wendell Holmes once said, "Too many people die with their music still in them." Coaching for Fulfillment gets clients to sing their own special song and dance their own special dance.

It's no surprise that Fulfillment is one of the core principles of Co-Active® Coaching — and no surprise that it is the first of the Intermediate courses. The work we do with our clients starts here. We ask them to take a stand for their fulfilling lives. We give them tools for getting clear about what that would be at the most fundamental level, and tools for staying on course when the tides and currents of their lives tend to pull them off course.

In coaching, if there were just one or two fundamental questions that capture the search for Fulfillment, they would be: “Client, who are you? What’s really important about how you live?”

Discovery Session Checklist

Welcome — Delighted to Work with Them

Set Up Agenda for the Session

- ☐ Where Are You Now?
- ☐ Where Are You Going?
- ☐ Primary Focus
- ☐ Agreements/Design Me

Where Are You Now?

- ☐ Wheel
- ☐ Values

Where Are You Going?

- ☐ Goals
- ☐ Vision
- ☐ Captain and the Crew
- ☐ Commitments
- ☐ Habits

Design Me

- ☐ Client Questionnaire
- ☐ Primary Focus

Training the Client

- ☐ Inquiry
- ☐ Saboteur

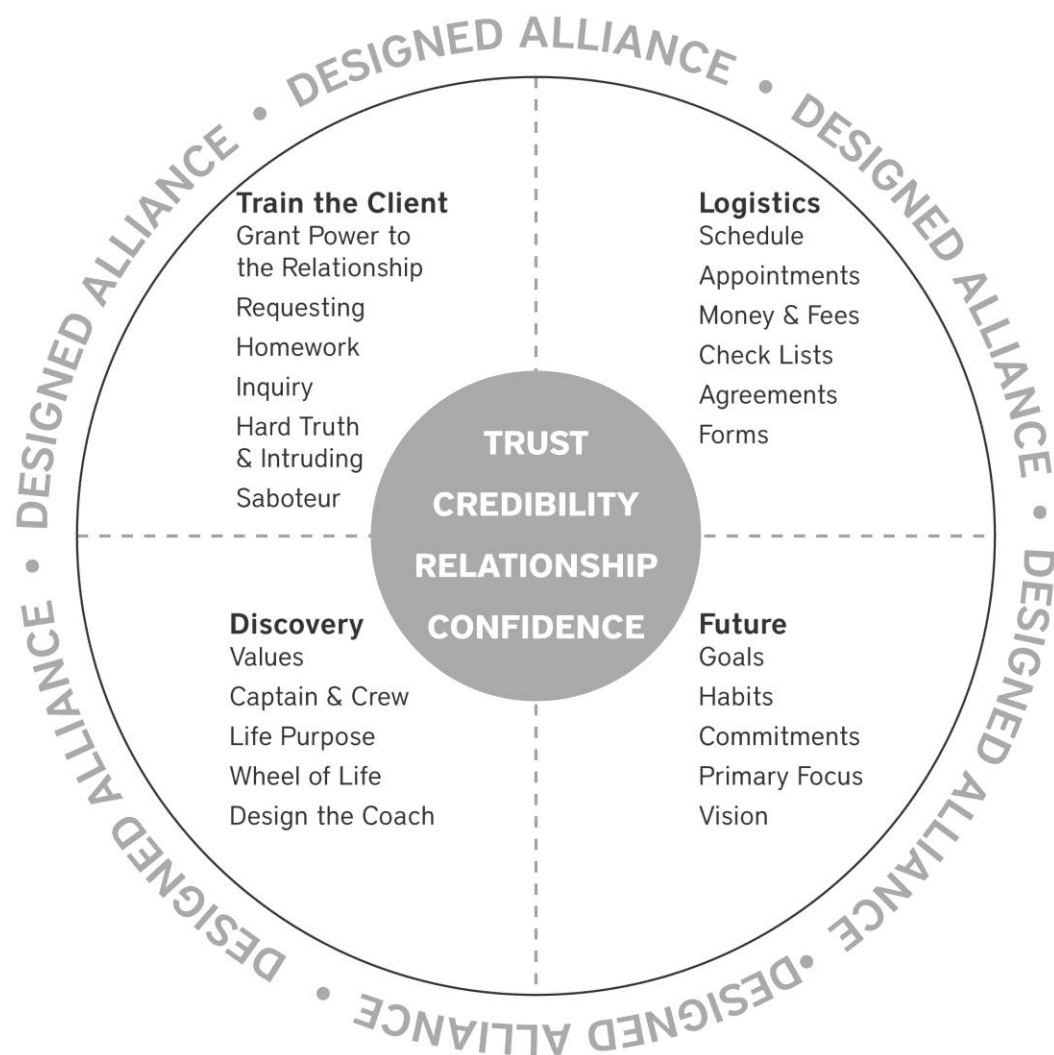
Payment

- ☐ Session Times

☐ Vacation

TOOLS

Discovery Session Template



Poems

Love After Love

The time will come
when, with elation,
you will greet yourself arriving
at your own door, in your own mirror,
and each will smile at the other's welcome,
and say, sit here. Eat.
You will love again the stranger who was yourself.
Give wine. Give bread. Give back your heart
to itself, to the stranger who has loved you
all your life, whom you ignored
for another, who knows you by heart.
Take down the love letters from the bookshelf,
the photographs, the desperate notes,
peel your own image from the mirror.
Sit. Feast on your life.
— Derek Walcott

Our deepest fear is not that we are inadequate. Our deepest fear is that we are powerful beyond measure. It is our light, not our darkness that most frightens us. We ask ourselves, "who am I to be brilliant, gorgeous, talented, and fabulous?" Actually who are you not to be?

YOU ARE A CHILD OF GOD. Your playing small does not serve the world. There is nothing enlightened about shrinking so that other people won't feel insecure around you. We were born to manifest the glory that is within us. And as we let our light shine we unconsciously give other people permission to do the same. As we are liberated from our own fear, our presence automatically liberates others.

— Marianne Williamson

(Nelson Mandela used this passage in his 1994 Inaugural Speech.)

Sample Inquiries

Inquiries are powerful questions that are used to keep the client in a learning and discovery mode between sessions. They are usually positioned at the end of the session.

Set Up/Beginning Inquiry

- What do I want? (Practice wanting)
- What is it to have a full, rich life?
- What am I tolerating?
- Where am I not being realistic?
- What is integrity?
- How do I operate?
- What is it to live in alignment with my values?
- What is it to be powerful?
- What is it to be present?
- What is my prevalent mood? Is that a habit?
- What is choice? What is it to choose?
- Where do I give myself permission to not honor my word?
- What is the difference between a wish and a goal?
- Am I being nice or am I being real?
- What am I doing to avoid feelings? (Alcohol, food, work, etc.)
- Where is my attention? (On self, others, work, day-dreams, my vision, my values, complaints, etc.)

What Works/Positive

- What keeps me going?
- What is working?
- What frees me up?
- What is it to be prosperous?
- Where am I too hard on myself?
- What is present when I am at my best?
- Where am I the solution?
- What is grace/enthusiasm/prosperity/abundance?
- What is it to be proactive?
- What is it to be centered/optimistic/supportable/non-attached?
- What is it to be in the flow/fluid/flexible?
- What is it to be compassionate?
- What is completion? Where am I incomplete?
- If I only have my attention on producing the result, what would I have to give up?

- Why am I taking this action?

Motivational

- When am I unable to laugh at myself?
- What do I have to give up to reach my goals or be a “10?”
- What do I choose in any given moment?
- What is the distinction between feeling good and fulfillment?
- Great goals are compelling; vaguely conceived goals are vaguely manifested — what type are my goals?
- What am I building? (Cathedral or block of stone?)
- What am I becoming?
- What is ownership?
- What is it to be undaunted?
- Who I am is who I say I am — Who am I this week?
- What is it to allow or include?
- What is it to be creative?
- What are powerful questions I can ask myself each morning?
- What is it to be tenacious/persistent?
- What flag am I bearing?
- What is it to be a leader/powerful/resilient/resourceful/empowering/determined?
- What pain do I notice in the people around me?
- What is it to come from my heart?
- How have I withheld myself from life?
- Is what I am doing right now life affirming or life numbing?
- What is it to be intuitive?
- What is it to be focused?

Stopped/Blocked Client

- What is the Lie?
- What am I resisting?
- If I am at my best, what would I do right now?
- Where do I give my power away? To whom? When?
- What are my false assumptions?
- What/where do I pretend? (to know/to not know?)
- What do I need to “let be”?
- What is needed or wanted in this situation?
- What is it to be exceptional?
- What will I gather evidence for this week?
- What is it to generate or cause?
- What are my wants versus my “shoulds”?
- Where am I an automatic NO/YES?
- Where do I limit myself?
- What are other possibilities?
- Where am I too comfortable?
- What is it to move toward the fear?
- What is it to “lean into” it?

- Where am I selling out on myself?
- What ELSE can I do to honor my values?
- What request(s) can be made to unstick me?
- What is the powerful interpretation?
- Where am I uncompromising? Where am I too flexible?
- What does _____ cost me?
- Where do I hold back?
- What am I withholding?
- Where/what am I unwilling to risk?
- What is it to surrender?
- Where am I suffering?
- What will free me up?
- What are my assumptions?
- What are my expectations?

Pleasure/Fun/Light

- How can I pamper myself today?
- What is it to be grateful?
- Who can I make smile/laugh today?
- What will recharge my batteries?
- What is fun?
- How can I contribute to my reserves of fun, leisure, centeredness, balance, resourcefulness, patience, etc.?
- How can I have this be easy?
- Who can I get to play with me on this project?
- What is it to be tickled?
- What is grace/serenity?
- What makes me laugh? What makes him or her laugh?
- Do I choose heavy or do I choose light?
- Since I am going to do this anyway, do I choose to have it be enjoyable, neutral, hard or fun?
- What can I do to my physical environment to have it nurture me/lighten me up/empower me/etc.?
- What is fulfilling, what feels good and so what?
- What is pleasure?
- What acknowledgment can I give myself today?
- What is kindness?
- What is it to go softly into life?
- What is abundance?
- How can I have this be playful/light?
- How can I double my vitality?
- What do I need to give myself permission to do today?
- When will I take a break today?
- What thrills me?
- What is it to be awed?
- What is it to be generous?
- What is it to be considerate?
- What is it to be gentle with myself?
- What is it to savor?

- What am I grateful for this morning/afternoon/evening?

Provocative

- What do I regret/resent?
- What am I unwilling to change?
- Where might I be in denial?
- What am I overlooking?
- Where am I taking my foot off the gas?
- What is the decision I have been avoiding?
- Where do I stop short?
- What is a big enough game?
- What have I wanted to do and haven't?
- What keeps me from winning/succeeding?
- Where have I denied myself/others?
- Why bother?
- What am I being right about?
- What complaint/fear/bad habit/discomfort can I do something about today/this week/this month?
- Where am I unconscious/asleep?
- What am I settling for?
- Why this goal? Why bother?
- What am I overlooking?
- How do I sabotage myself?
- What is it to transcend my sense of failures/sense of resignation/feelings of "I can't?"
- Where am I selling out on myself?
- What am I uncomfortable about doing that I am unwilling to change/willing to change?
- What am I stepping over?
- What is my reputation?
- What do I expect of myself?

Ending/Completion

- What is it to be complete?
- What's next?
- What territory have I taken?
- How far have I come?
- What are the golden nuggets I am taking away?
- Who have I become?
- What have I built?
- What is the new elevation that I regard my life from?
- What did it take to get here?
- What have I learned about myself?
- What does it take to maintain?
- What are indicators of yellow-alert signals?
- What will keep me on track?
- What is it to be filled with loving kindness?
- What is it to live life fully?
- What is it to love deeply?
- What values require my constant attention?
- What will I be giving away?
- What is my contribution to the world going to be?
- Who did I have to be to reach this place?

- How will I know to ask for support?
- What acknowledgment would I like to give myself?

Homework Assignments

- Forgive yourself once a day.
- Count the number of times a day you notice your Saboteur.
- Be thrilled over little things/three times a day/with THE thing you dislike/the person you dislike.
- Laugh/smile 25 times a day — Identify 25 things that make you laugh/smile.
- Be present for 15 minutes at a time three times a day.
- Identify your 5 most prevalent Saboteur conversations.
- Identify your justifications.
- Identify your expectations.
- Play a bigger game this week.
- Eliminate _____ words from your vocabulary this week.
- Add _____ words to your vocabulary this week.
- Do the hard thing first each morning and after lunch.
- Say no _____ times a day.
- Make _____ mistakes a day, or fail in the attempt.
- Take _____ risks this week.
- Ask _____ people for the business/out for coffee/a date/etc. each day this week.
- Say “So what” _____ times a day.
- Answer the question “why bother” with every new action.
- Count the number of times you speak powerfully.
- Only speak powerfully this week (not positively, powerfully).
- Catch yourself growing (making mistakes).
- Choose what you have in every moment.
- Enjoy two big belly laughs each day.

Sample Powerful Questions

Alternatives

- What are the possibilities?
- If you had your choice, what would you do?
- What are possible solutions?
- What if you do and what if you don't?

Appraisal

- What do you make of it all?
- What do you think? (is best?)
- How does it look to you?
- How do you feel about it?

Background

- What led up to _____?
- What have you tried so far?
- What do you make of it all?

Clarification

- What do you mean?
- What does it look/sound/feel like?
- What seems to confuse you?

Description

- What was it like?
- What happened?
- Then what?

Evaluation

- In what way?
- How does this fit with your plans/way of life/values?
- What do you think?

Exploration

- Would you like to brainstorm this idea?
- What are other angles you can think of?
- What is just one more possibility?

Example

- For instance?
- Like what?
- Such as?

Extension

- What else?
- What other ideas do you have about it?

Failures, Preparation for

- What if it doesn't work out the way you wish?
- What if that doesn't work?
- And if that fails, what will you do?
- How do you want it to be?

Fun, Lighten Up

- What was fun about _____?
- What was humorous about the situation?
- How can you find a way to have it be fun?
- How do you want it to be?

Hypothetical

- If you could do it over again, what would you do differently?
- If it were you, what would you have done?
- How else could a person handle this?
- If you could do anything you wanted, what would you do?

Identification of Issues

- What seems to be the trouble?
- What seems to be the main obstacle?
- What is stopping you?
- What concerns you the most about _____?

Implementation

- What will you have to do to get the job done?
- What support do you need to accomplish _____?
- What will you do?
- By when will you do it?

Information

- What information do you need before you decide?
- What do you know about it now?
- How do you suppose you can find out more about it?
- What kind of picture do you have right now?

Integration

- How do you explain this to yourself?
- What was the lesson/learning?
- How can you lock it (the learning) in?
- How would you pull all this together?

Involvement

- What was your part in this?
- How do you fit into the picture?
- What were you responsible for?

New Start

- If you had free choice in the matter, what would you do?
- If the same think came up again, what would you do?
- If we could wipe the slate clean, what would you do?
- If you had it to do over again, what would you do?

Opening

- What would you like to focus on today?
- What would you like coaching on today?
- What would you like to explore today?

Outcomes

- What do you want?
- What is your desired outcome?
- If you got it, what would you have?
- How will you know you have received/reached it?

Perspective

- When you are 95 years old, what will you want to say about your life?
- What would you like to be doing five years from now?
- What is your life purpose?
- In the bigger scheme of things, how important is this?

Planning

- What do you plan to do about it?
- What is your game plan?
- What kind of plan do you need to create?
- How do you suppose you could improve the situation?

Predictions

- How do you suppose it will all work out?
- What will that get you?
- Where will this lead?
- What are the chances of success?

Relation

- If you do this, how will it affect _____?
- What impact will that have on balance/values?
- How does this affect the whole picture?
- What else do you need to take into consideration?

Taking Action

- What action will you take? And after that?
- What will you do? When?
- Where do you go from here? When will you do that?
- What are your next steps? By when?

Summary

- How is this working? How is this going?
- How would you describe this?
- What do you think this all amounts to?
- How would you summarize the work/effort so far?

The Captain and the Crew Chart Definitions

The Captain

Your Captain is your inner leader, a visionary who is always in command and leads all parts of yourself towards the fullest expression of your Life Purpose. Key attributes:

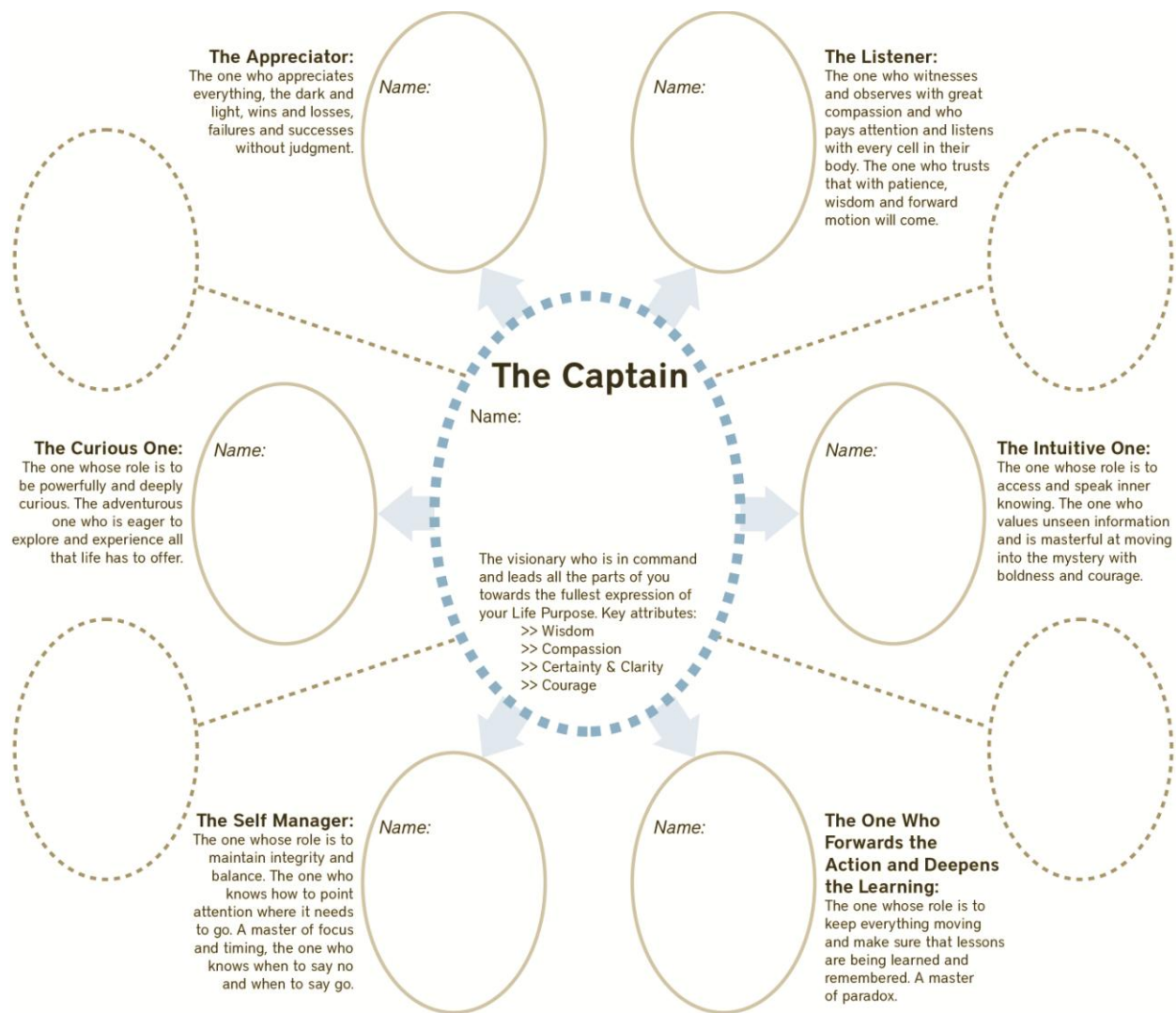
- **Wisdom:** Your Captain has access to all the wisdom that ever was. He or she has been there and back again and has the experience to keep you pointed and on purpose.
- **Compassion:** Your Captain loves you completely and unconditionally. No matter what happens, he or she holds you tenderly with gentleness, compassion and infinite patience.
- **Certainty and Clarity:** Your Captain believes in you completely. He or she is always grounded and can quickly see what is needed and how best to move forward.
- **Courage:** Your Captain is fearless and relentless in his pursuit of the very best for you. Your Captain's will is unshakable and his or her dedication is unwavering.

The Crew

- **The Appreciator:** This crew member is a free agent and moves easily into all domains of the Captain and Crew Map. He or she is able to appreciate everything that happens and can find value in anything. The Appreciator does not know how to judge. He or she understands that life is unfolding exactly as it should and appreciates the gift in everything.
- **The Curious One:** This Crew member has an adventurous spirit and is eager to explore ALL of life. Powerfully and deeply curious, he or she asks lots of questions with the wide eyed wonder and excitement of a three year old. This Crew member LOVES to play in experiences of all kinds and is committed to freedom of expression, freedom of spirit and freedom of soul.
- **The Listener:** This role of this Crew member is to witness and observe. With great compassion, he or she holds a container for whatever is occurring without needing to jump in and fix it. This Crew member listens deeply with every part of their being and has X ray vision, enabling him or her to look underneath the words and see what is really being expressed. He or She is masterful at being present, regardless of what energies are swirling around and is able to "be with" and include it all.
- **The One Who Forwards the Action and Deepens the Learning:** This Crew member keeps everything moving and makes sure that lessons are being learned and remembered. He or she understands that life is a paradox and relishes the tension between being and doing, dark and light. This Crew member is a masterful at balancing essence with action to bring your most resonant desires into reality with vision clarity, meaning and heart.
- **The Self Manager:** This Crew member knows when to say "no" and when to say "go." He or she is a master of attention and carries a "light saber" of attention by their side, pointing it wherever attention is needed. This Crew member is infinitely flexible and can help you recover rapidly whenever you find yourself trapped in self doubt or a negative emotion.
- **The Intuitive One:** This Crew member is able to access an inner sense of knowing and to offers insight without attachment. He or she is masterful at "knowing" from all parts of the self and values

unseen information as much as that which has been tested and proven. This Crew member is masterful at moving into mysterious and unknown waters with boldness and courage.

The Captain and the Crew Chart



Client Questionnaire

As your coach, it's important for me to get a sense of how you view the world, and yourself in the world. Each person has his/her own unique way of perceiving the world, and has a unique way of interacting with others.

The following questions are designed to help me get to know you better. They are designed to be pondered and to stimulate your thinking in a way that will make our work together productive and rich. I suggest you chew on the questions for a few days before you compose your responses.

1. Look forward 20 years... you are attending a function where someone is giving a speech about YOU! What would you want them to say?

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

3. Think about one or two people you know who really inspire you. What about them is inspiring?

4. What's missing in your life, the presence of which would have your life be more fulfilling?

5. What would you do if you knew you could not fail?

6. What are your spiritual beliefs? Do you believe in the concept of a higher power? Please describe the most useful, empowering aspects of your spiritual beliefs.

7. What activities have heart and meaning for you?

8. What needs in the world are you moved to meet?

9. What two steps could you immediately take that would make the biggest difference in your current situation?

10. When are you unable to laugh at yourself?

11. When do you give your power away? To whom?

12. What drives you crazy?

13. What do you contribute that is unique?

14. What special knowledge do you have?

15. What can I say to you when you are “stuck” that will return you to action?

16. If you trusted your coach enough to say how to manage you most effectively, what tips would you give?

17. What else would you like me, as your coach, to know about you?

Commitments

Commitments are ongoing quality of life shifts. Commitments are different from goals. With a goal, there is a specific point in time where you have either accomplished it or not. It is measurable and specific. For example: you have either increased your income by 30% by September of 20XX or you have not. A commitment is not measurable. It has to do with a state or kind of being you want to create in your life. For example: I am committed to having joy and self-expression in my work.

Using the Wheel of Life as a guide, look to see what you are committed to creating in the following areas of your life.

My Commitments:

Career

Money

Health

Friends & Family

Significant Other

Personal Growth

Fun & Recreation

Physical Environment

Daily Habits

Daily Habits are small constructive actions done on a routine basis. These actions can quickly give you a sense of accomplishment and forward momentum. These daily habits form a foundation upon which major change takes place. What action, if taken on a regular basis, would make a difference for you in one of the areas on the wheel of life?

Examples: Walk three times a week. Take vitamins daily. Meditate for 10 minutes a day.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Goals

A goal has a specific measurable result. For example: earn a promotion to VP of Sales by November 8, 20XX. It is important to remember when working with goals that a goal is a landmark or signpost to use as you move forward in life. Goals are a way of measuring progress and evaluating the effectiveness of your actions. If you do not reach your goal by your target date, it is an opportunity to look and see if:

>> You are truly committed to that goal (it's OK if you are not).

>> The actions you have taken are appropriate.

It is also important to set goals that are compelling and will allow you to stretch and grow. These goals are more than a glorified to-do list.

I encourage you to set exciting, challenging goals and to welcome the occasional failure that inevitably accompanies this courageous endeavor.

Your goals may come to you quickly, or you may need some inspiration. Again, the Wheel of Life will give you inspiration about areas of focus.

GOAL

BY WHEN

Personal Information Fact Sheet

Client Information

Name:

Address:

Home Tel.:

Work Tel.:

Fax:

E-mail:

Employment Information

Occupation (what you do to earn a living):

Employer Name:

Personal Information

Date of Birth:

Significant Other:

Name(s) of Child(ren) and age(s):

**All personal information is confidential.*

Sample Welcome Letter #1: Introduction

Brilliant Coaching
1234 Main Street
Anytown, USA

Amazing Client
4567 Fred Street
Special Town, USA

Dear Amazing Client:

Welcome to Coaching! Congratulations in your choice to focus time and energy on your own growth. I am passionate about supporting you to extend your reach and become even more than you dreamed possible. I look forward to the magic we'll co-create in your life.

Coaching is about you as a whole person: your values, goals, work, balance, fulfillment, and life purpose. I work with highly motivated individuals like you to develop their own definition of success. Most clients want to achieve specific goals so they can lead a more fulfilling life. We will design a plan that is specific to your needs and aspirations.

Our initial appointment, the discovery session, is meant to jumpstart our relationship. During our first session we will be designing our alliance (how we will work together), how you want me to coach you and what tools and structures I bring. Most of this session will be discovery — this is when you will train me on who you are, what you wish for in your life and what I am to hold for you as your vision.

I am enclosing some homework to get the juices flowing for our discovery session. In order to maximize our time together, please spend some time giving the homework careful thought. If you are unable to complete all of it, don't worry; we will be working with this information when we are together. It is meant to spark your thought process for our first session. The information will at least give you an idea of what to expect. Please photocopy any forms you do complete and send me a copy before our meeting.

Your discovery session is scheduled for _____. We will be conducting the session over the telephone and you will call me at XXX-XXX-XXXX.

A word about financial agreements...

The fee for the discovery session appointment is \$XXX. The fee for monthly coaching is also \$XXX. We will be working together four times per month. The fee for the discovery session is due at the appointment. I send invoices on the 20th of each month for the coming month. You will be paying me in advance for your monthly sessions.

Amazing Client, I am looking forward to working with you. If you have any questions or concerns call me at XXX-XXX-XXXX.

Sincerely,

Sample Welcome Letter #2: Welcome

Dear _____,

Welcome to the journey of coaching. I am confident it will add an element that will enhance and deepen the experience of your Life Path.

I'm eager to begin, and in this packet I have included a few items that will get us moving efficiently and powerfully.

I invite you to take some quiet time to be with the forms and questions enclosed and to allow your responses to emerge clearly from within. Occasionally, you might just get a feeling for an answer and be moved to stay with that rather than use words to answer. That's perfectly fine, too.

What I'd like you to send (fax, email) back to me before our first session (make necessary copies for you):

- >> The signed agreement (policies and procedures) page
- >> The completed questionnaire
- >> The personal information sheet
- >> The Primary Focus work sheet
- >> The Wheel of Life
- >> The Goals worksheets
- >> Your payment for the discovery sessions and, if possible, the first month of coaching

The following are for you to keep. We'll be working with these as time goes on:

- >> The Daily Habits worksheet
- >> The Session Preparation worksheet

I'll look forward to your return mail or fax and continuing our work together on (date and time). Please call on XXX-XXX-XXXX.

Warmly,

Sample Welcome Letter #3: Agreements

Confidentiality:

Our relationship is completely confidential. I will not be telling anyone you are my client and I will not reveal the content of our coaching sessions to anyone. This is sacred. You are free to share whatever you choose from our sessions with anyone.

Time:

We will begin and end our sessions on time, in honor of our commitment.

Schedule:

Please call at your scheduled time. If you are early I may be completing another session. Please simply call back in a minute or two. If you need to reschedule I would appreciate 24 hours notice. I will do all I can to reschedule within the same week. In our busy lives, each of us will occasionally need to move a session. I will extend to you the same courtesy, and give you as much advance notice as possible.

Fees:

My fees are \$XXX for the discovery session and \$XXX for four sessions (half-hour each) per month.

In-Between Sessions:

If you would like to share a success or a problem with me at non-coaching times you may contact me via email, fax (XXX-XXX-XXXX), or leave me a voice mail.

Completing Our Relationship:

When you decide it is time to end our coaching relationship, please give me two weeks notice. This will give us time to capture your learning and strategize for what is next in your life.

Finally, if I ever say or do something that upsets you or doesn't feel right, please bring it to my attention. I promise we will work to strengthen our relationship so that it supports your growth.

I look forward to our journey.

Sample Welcome Letter #4: Policies and Procedures

Welcome! I am delighted to be your coach and look forward to coaching you toward creating the life you really want to have. On a business note, I have some policies and procedures I want you to be familiar with. Please know that if you have any questions regarding these we can discuss them further.

Commitment:

You are hiring me as your coach because you want to make significant changes in your life. These changes will sometimes happen fast and sometimes not. Because change happens over time I am requesting a four-month commitment to the coaching process. This allows the coaching relationship to develop and be powerful, and when the going gets tough we stay in collaboration and work through to the other side. As your coach you have my word that I am 100% committed to you being powerful, successful and to having the life you want.

If during the four month phase there is any reason to change our agreement, my request is that we design a time period during which we will look at the issue/s and create a mutual resolution that honors client, coach and the coaching relationship. After the initial period we can continue on a month-to-month basis. When it is time to end the coaching relationship, I request 30 days' notice.

Fee:

My monthly fee is \$XXX and the fee for the discovery session is \$XXX. Coaching fees are commonly tax deductible as either a consulting or education expense on your Schedule C. Your payment needs to be received by the 1st of each month at (address).

Please make prior arrangements if you need to be late, or especially if some other day of the month works better in your bookkeeping cycle. As a convenience to both of us, I offer the option of using a credit card for your payments. If you would like to use this service please fill in the information below:

Card type _____ Card

_____ - _____ Exp. Date _____

Name on Card _____

Procedure:

Call me at your scheduled appointment time. This is my coaching line and is dedicated only to clients calling in. It is also used as a fax line so if you are faxing me something and the line is busy please try again later. Evenings and weekends are best for faxes. For voice mail call xxx-xxx-xxxx. Wait for the message and then press #2 to enter my personal voice mail.

Sessions:

Our agreement includes four sessions per month at 30 minutes each. Ideally, we will "lock in" a time that works consistently for both of us. If you are on vacation, we will spend more time before you leave or after you return. Four times per year there is a "5th week" in the month, and I use these breaks as a vacation.

If I am traveling and we have a session I will let you know in advance and, generally, we will either change our appointment time or I will know where you can call me on the road.

Changes:

Rescheduling an appointment is easy with advance notice. If you have an emergency, we'll work around it. If you must cancel a session, we will make it up to have four sessions during the month, or extra time on the sessions we do have. Missing an appointment without notice is considered a paid appointment.

Extra Time:

Call me between our scheduled sessions if you need a sounding board, have a problem or want to share a success with me. I have time between our regular sessions to speak with you if needed, and I enjoy providing this extra level of service. I do not bill for additional time of this type but ask that you keep the extra sessions to five or 10 minutes, please. Also, use my e-mail, fax and voice mail as often as you like.

Problems:

If I ever say or do something that upsets you or doesn't feel right, please bring it to the session. I promise to make you right for it and do what is necessary to have you be satisfied.

E-mail:

Communications, homework accountability and more can be handled through email. Use it frequently to stay in touch.

Please sign and return a copy of this form.

(Your name) _____

(Date) _____

Sample Welcome Letter #5: Coaching Agreement

Client: _____

This AGREEMENT, between (coach/or coach company name) and the above named client will begin on _____ and will continue FOR A MINIMUM of three months. The fee for the initial discovery session is \$ _____ and the fee for the initial three months is \$ _____ per month, payable in advance.

The services to be provided by (coach/or coach company name) are coaching or tele-coaching as designed jointly with the client. Coaching — which is not advice, therapy or counseling — may address specific personal projects, life balance, business successes or general conditions in the client's life or profession. Other coaching services or activities include Values Clarification, Brainstorming, Personal Strategic Planning and a process of examining various modes of operating in life.

Upon completion of the three months, (coach/or coach company name) will convert to a month-to-month basis. The client and (coach/or coach company name) agree to provide one another with 30 days' notice in the event it is desired to cancel further services. It should be noted that an average of four weeks is used in calculating the monthly fee, and there is an assumption that vacations are covered by this average. In other words (coach/or coach company name) or the client may be on vacation without an adjustment in the regular monthly coaching fee.

(coach/or coach company name) promises the above named client that all information shared with (coach/or coach company name) will be kept strictly confidential. Sometimes information shared by the client may be specific and explicitly personal. Your willingness to be so truthful will be treated with the ultimate respect.

Throughout our working relationship, the conversations will continue to be very direct and personal. You can count on me to be honest and straightforward, asking clarifying questions and making empowering requests. The purpose of our interaction is to hold your focus on YOUR desired outcome and to coach you to stay clear, focused and in action. You understand that the power of the coaching relationship can only be granted by you — and you agree to do just that. When you see the coaching is not working as desired, you agree to communicate and take actions to return the power to the coaching relationship.

By signing below you agree to keep your agreements, to regard our appointment time frames with respect and to keep the coach informed as to what is needed to keep you moving forward.

Our signatures on this agreement indicate full understanding and agreement with the information outlined above.

Coach or coach company name/Date

Client/Date