

Welcome

You have taken a big step by committing to coaching. By deciding to work with a coach, you have chosen to take charge of your life. Coaching is not like consulting or therapy. I will not be giving you advice or providing expertise. Throughout our coaching relationship I will assume that you are the expert on your life, that you have the answers. I will ask direct questions that relate to what is going on with you. I will ask you to take action when you have chosen an objective, and I will hold you accountable for the actions that you commit to. We will work as a team to create a coaching alliance that will help you stay focused and move forward toward your chosen goals.

Coaching will be challenging and rewarding. I ask only that you bring yourself to each call exactly as you are. You may be confused, excited, frustrated, proud of yourself or your actions, angry, delighted, fearful or any of a thousand other states of mind. Coaching is about all of you, about how the whole system operates. By looking at yourself honestly and without judgment we can explore how your thoughts and actions serve or limit you. You can create more choices that enrich your life.

Upon our intake appointment, we will design a coaching relationship to best meet your needs. We will use the assessment to take a snap shot of how you feel about several areas of your life at this moment. We will discuss your personal resources and the objectives you want to set for the initial three months of coaching, and we will discuss the values that define who you are. You may choose to fill out these pages before our appointment and fax them to me, or we can complete them during our appointment. My coaching line is 425.358.5036 and the fax number is 425.358.5036 and my e-mail is pk@journeyinwardcoaching.com.

Once again, welcome to coaching! I'm confident that we can design a powerful relationship that will provide the structure and support to keep you moving forward. I admire your commitment to yourself and to the future you dream of.

I look forward to speaking with you soon!

Personal & Contact Information

Name _____

Address _____

Telephones

Home _____ Work _____ Mobile _____ Fax _____

e-mail _____@_____

Personal Information

Birthdate _____ Spouse/Sig Other name _____

Anniversary _____

Children

_____ Age _____ Age _____

_____ Age _____ Age _____

Family (parents, siblings, important extended family)

Friends (important personal and professional relationships)

Your work responsibilities

Work deadlines, targets, reviews

Task _____ Date _____

Task _____ Date _____

Task _____ Date _____

Agreement

I, _____ am committed to creating a coaching alliance with **Journey Inward Coaching, LLC** that will support me in defining and reaching my goals and living the life I want to live. **Paula Kawal** will hold all content of our sessions confidential, within the limits of the law.

I agree to coaching for a minimum of three months. yes no

I agree to an initial intake appointment (typically two hours). yes no

I want to work with **Paula** to shape the coaching relationship to best meet my needs by:

Learning about my own motivation yes no

Letting **Paula** know about what works and doesn't work for me yes no

Making requests and co-designing strategies that support me yes no

Refining and changing when a strategy doesn't fit for me yes no

I give **Paula** permission to:

Challenge me with powerful questions yes no

Request that I take action yes no

Hold me accountable for actions that I commit to yes no

I agree to the following business arrangements:

A fee of _____ a month or _____ a quarter yes no

To be paid at the beginning of the month or quarter yes no

A one-time intake fee of _____/hr, (if 2 hours total _____) yes no

_____ sessions per month, each _____ minutes long yes no

I agree to the following scheduling arrangements:

I will re-schedule any appointments 24 hours in advance yes no

If I miss a call without notification, I might be charged for the call yes no

If I am late for a call, my time will be shortened accordingly yes no

The final call at the conclusion of our coaching alliance will be a completion call yes no

Paula will review the intake materials and either

Contact you to schedule an intake appointment and reserve a regular coaching time

or

return your materials with a referral list of three certified coaches

Name

Date

Paula J. Kawal

Date

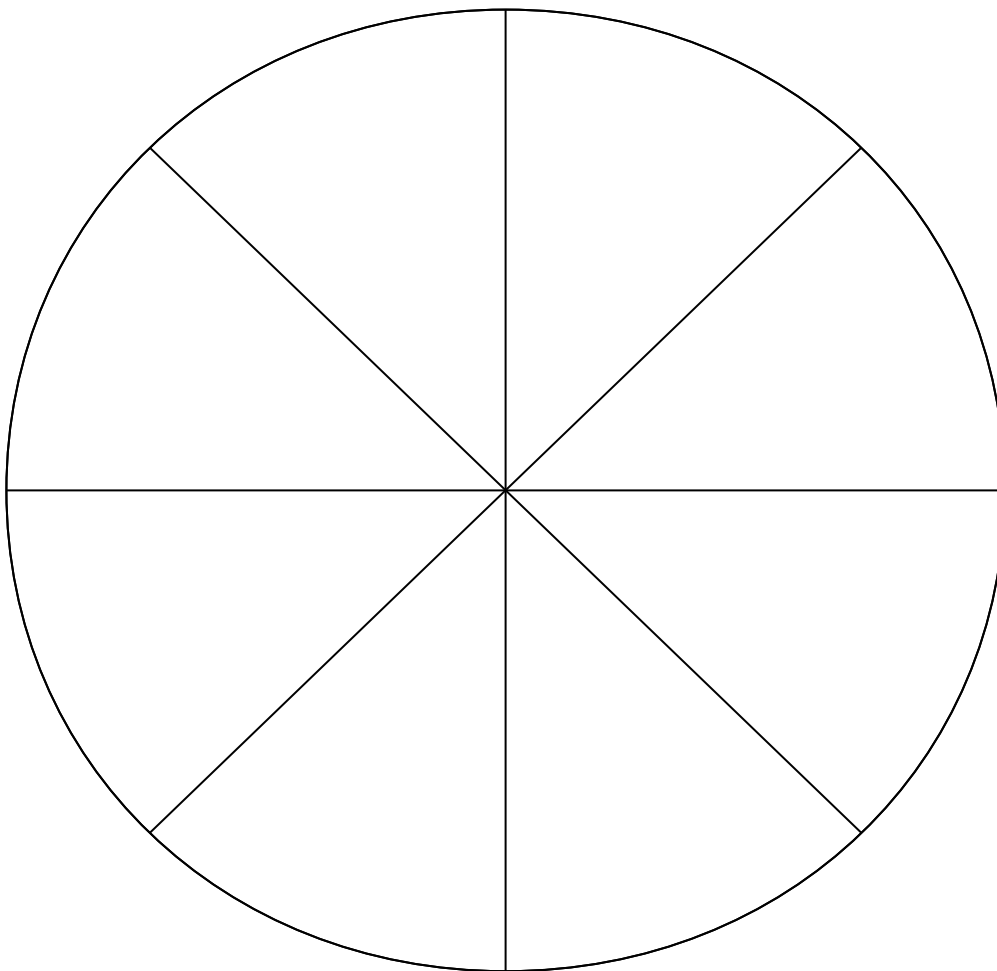


The Life Balance Wheel

In this exercise, you will be asked to evaluate your life in each of at least eight areas. Select labels (from the list) and label each section of the wheel. Create a wheel that represents balance to you. You may subdivide any of the sections, i.e., Health could be divided into physical and emotional, Money could be divided into cash flow and savings.

For each of these areas, ask yourself, “How satisfied am I in this area of my life right now?” Give a number (from one to ten) that represents your current level of satisfaction. One would be low; ten would be high.

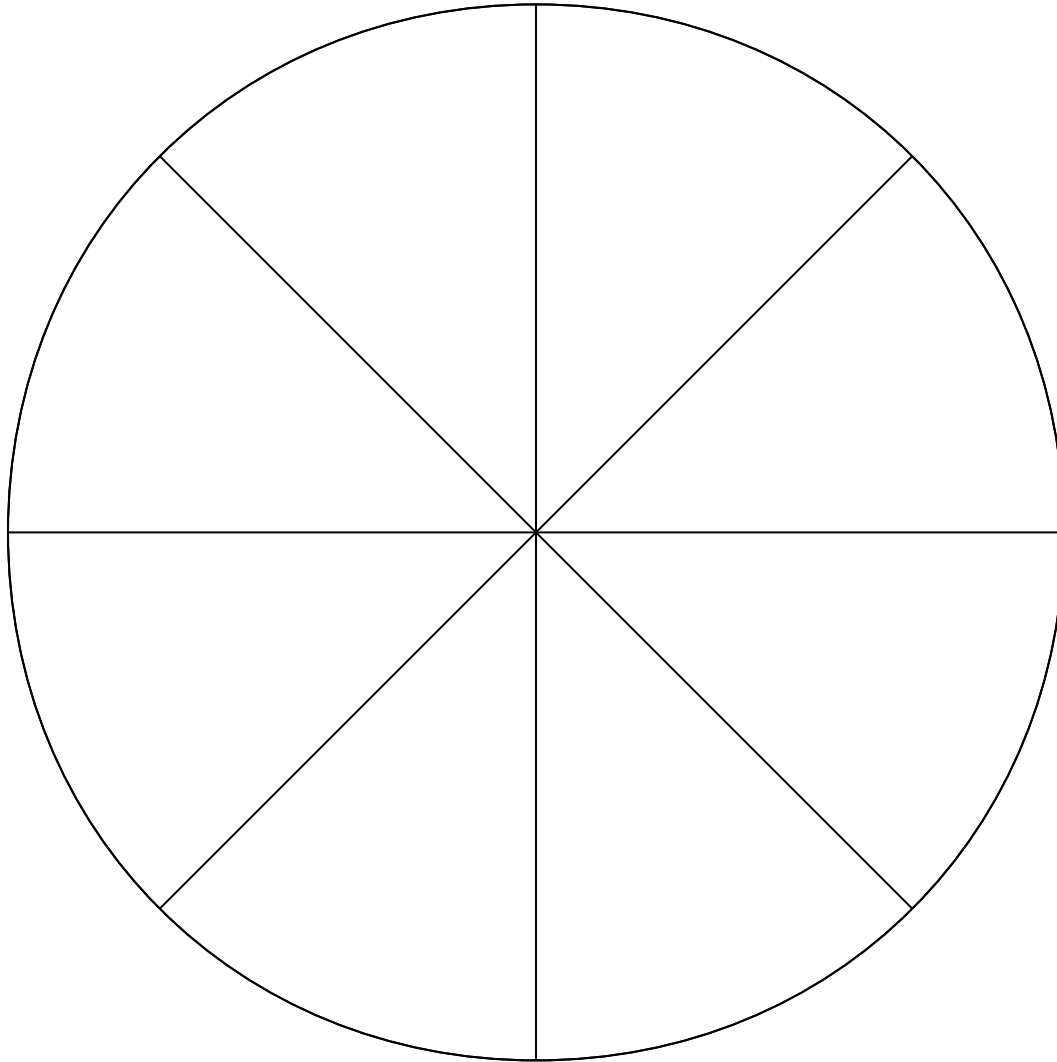
Notice two distinctions in the questions. “How satisfied am I...” This is a subjective assessment. It is not about how your family or colleagues or neighbors see you; it is not about success; it is about personal satisfaction. Also notice “right now”. This wheel is a snapshot. Scores will change weekly, daily – even hourly as circumstances change. Do not look for ultimate truth; just check in with how you feel in this moment.



Here is a sample of section labels that have been created by other individuals: Personal Growth, Money, Health, Friendships, Family, Work/Career, Physical Environments (home, office, etc.), Significant Other/Romance, Fun and Recreation, Spiritual Life, Use of Time.

The Wheel at Work

This is similar to the life balance wheel, but you will choose the labels for each of the sections based on what is most important to you at work. Again, in each of the eight areas, how satisfied are you with how you are performing? This could also apply to your team or to your organization. How is the balance? What areas are strong? Where do you want to focus your attention?



Here is a sample of section labels that have been created by other businesses: Growth, Communication, Customer Satisfaction, Bottom Line (Money), Marketing, Feedback, Excellence, Time/scheduling, Attracting New Talent, Retention, Clarity, Employee Fulfillment, Industry Leadership, Product Development, Responding to the Global Economy, Information Technology, Service.

About Your Values

In this exercise, we won't be using the word values to describe a sense of morality or a personal philosophy. That's a valid way to define values, but we will instead be using values to mean the qualities that define you, that are at the core of who you are. Your values are the things that matter most to you. Without these things, you would not be you.

Our values help us make choices about what we commit to in our lives. If you commit time and energy to something that violates or neglects one of your core values, you will most likely feel resentful and frustrated. If you do not honor your values in your activities and relationships, you will begin to get a nagging feeling that something is missing or wrong in your life.

While it is enormously helpful to know our core values, it's not always easy to identify them. I'd like you to create a list by thinking about the ideas below. Don't worry about getting it "right" and capturing all your values. Your list will be a work in progress. Also, your values don't have to be a single word -- they could be strings of words or sentences. Find the words that work for you.

Try thinking about these things:

What is important to you?
What do you care about?
What do you want in your life?

When do you feel happiest? Select a time from your personal history when you felt particularly fulfilled. There may have been challenges, but you were on a roll. It may have been a few minutes, or hours, or days. What was important about this experience? What values were you honoring?

What do you react negatively to? What makes you angry or frustrated? Think about one of these things. What value is being violated? What kinds of situations cause you to feel incongruent? When are you not being true to yourself?

For each of us, there are usually values that are so much a part of us, that we don't even think to put them on a list. These are often our most dearly held values. A teacher might fail to include learning, an artist might forget to write down creativity, a business owner might overlook financial success. Often these things are so much a part of who we are, that they become invisible to us.

Generate a list of values. Next, notice which of these in your life you are honoring, which "get lost" or are neglected, and which you sometimes violate through behaviors or choices.

Values

Your Resources: Unique Qualities, Talents and Gifts

Create a list of your unique qualities, talents and gifts. These are the personal resources you bring to any endeavor you might undertake. Think of every context, home, work and play. Are you friendly? Optimistic? Do you facilitate well? Are you tidy? Methodical? Do you have big visions? Start writing a list and keep at it until you reach the bottom of the page.

Now look over the list of words on the next page. Circle the words that you could use to describe yourself and cross out the words that do not think of as aspects of you.

Unique Qualities, Talents and Gifts

Able to choose	Excited	Polite
Accountable	Expressive	Powerful
Acknowledges	Facilitates	Practical
Adapts well	Faithful	Presents self well
Alert	Financially independent	Proactive
Anticipates wants and needs	Firm	Problem-solver
Appropriate	Flexible	Productive
Asks for what s/he needs	Generative	Punctual
Assertive	Generous	Re-creates
Astute	Happy	Refines
Attentive to details	Healthy	Reliable
Authentic	Homest	Resourceful
Aware	Honorable	Responsible
Begins things	Independent	Satisfied
Boundaries clear	Initiates	Seasoned
Builder	Innovative	Self-confident
Calm	Inquiring	Self-generating
Candid	Inspiring to others	Self-reliant
Capable	Integrates	Sense of humor
Certain	Intelligent	Sensual
Clear	Intentional	Serves
Committed	Interested	Sincere
Communicates effectively	Intimate	Skillful
Compassionate	Joyful	Spiritual
Conscious	Knowledgeable	Spontaneous
Consistent	Leader	Stable
Contributes	Learns naturally	Steps over nothing
Cooperates	Listens	Strong
Courageous	Loyal	Supportive
Creative	Magical	Tactful
Curious	Manager	Talented
Diplomatic	Manages time	Tidy
Disciplined	Network-builder	Timely
Dynamic	Open minded	Trainable
Easy-going	Optimistic	Trusting
Effective	Orderly	Truthful
Emotionally stable	Organized	Validates
Empathetic	Patient	Versatile
Empowers	Peaceful	Visionary
Energetic	Perfect	Vital
Engaging	Planner	Willing
Enthusiastic	Playful	Wise
Ethical	Poised	

Outcomes for Coaching

Identify the areas that you want held as your main focus for the next three-month period. For each focus area, provide A- a simple heading and B- a description of a measurable result, your evidence that the goal has been or is being reached. These focus areas could be specific projects or tasks to be completed, or ongoing changes that effect your quality of life.

Samples:

I complete a project

Ongoing evidence – I have outlined tasks I must finish and I stay on a timetable that gets the work done within my time frame.

Final evidence – The project is complete

I feel more in control, less in overwhelm.

Ongoing evidence -- I have a system to follow up on the small steps that will lead to the completion of larger goals and I consistently take action on the steps. I am able to limit my obligations so that I have a manageable amount to do. I allow myself regular breaks from work so that I can re-charge. I feel more relaxed.

1.

2.

3.

4.

Preparation

From:

How I want to use my time today:

Reporting (accountability, inquiry):

Celebrations, Insights, Challenges, Opportunities:

Design the Alliance:

What I want to be held accountable for:

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