



Welcome to Coaching

Welcome

This packet includes:

- Code of ethics,
- Range of deliverables,
- Coaching agreement, and
- Several assessments and questions.

Please complete and send back via email.

The more open you can be and the more information you are willing to share, the better I can prepare myself to coach you effectively.

Contact Information

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Changes

If you need to reschedule your session, please give me at least 24 hours' notice. If you have an emergency, I will work around it. If you must cancel a session, I will reschedule it. Sessions which are not cancelled in advance cannot be rescheduled and you will be charged. You must reschedule meetings within the given month, or the meeting will be forfeited. If you are late calling in, I will not be able to make up the missed time at the end of the call.



Pledge of Ethics

As a member of the international professional coaching community, in accordance with the Standards of the International Coaching Federation Code of Ethics, I acknowledge and agree to fulfill my ethical and legal obligations to my coaching Clients, Sponsors, colleagues and to the public at large.

Client Rights

- Privacy
- Confidentiality
- Respect, courtesy, fairness, and value
- Accepted as you are, without judgement or evaluation (including, for example, race, gender, sexual orientation, cultural origin, or neurodiversity)
- Not to be limited because your vision does not match the coach's vision of what is possible
- A safe and supportive relations and environment
- To fail, make mistakes, and to change your mind
- To move at your own pace
- Accept or reject the coach's input, suggestions, or guidance based on where you are at the moment
- Disagree with the coach – anytime
- Tell the coach the value anticipated is not being received and ask for a different approach or a referral
- Being held accountable for commitments (you will not be "let off the hook")
- A coach who will call on you when you are not being honest with yourself or the coach
- A coach who "walks the talk"
- End the relationship at any time
- End the coaching relationship without any feelings of guilt



Range of Deliverables

PERSPECTIVE:

The Coach provides fresh or different ways of looking at a situation, context.

VALIDATION:

The Coach validates via encouragement and acknowledgement.

MESSAGE:

The Coach shares fitting knowledge, opinions, or wisdom.

ENERGY:

The Coach provides energy and support as needed.

SOLUTION:

The Coach shares a solution to a problem or issue.

PLAN:

The Coach co-develops a plan of action with the client.

STRUCTURE:

The Coach provides support and a check-in structure for the client.

RESOURCE:

The Coach suggests/refers client to experts, books, tools, assessments.

OPTIONS:

The Coach expands the number of options the client thought they had.

CARING:

The Coach cares via listening, patience, safety and love.

TRAINING:

The Coach trains clients in personal and business skills.

ADVICE:

The Coach provides advice via recommendations and suggestions.

STRATEGY:

The Coach develops or codevelops a personal or business strategy.

FEEDBACK:

The Coach offers feedback, observations, insights, ideas and opinions.

CHALLENGE:

The Coach provides a challenge to the client to stretch or make a change.

SUPPORT:

The Coach is available for both e-mail and telephone support during the month



Coaching Agreement

Name _____

Address _____

Email _____

Phone _____

Birthday (optional) _____

Session Procedure Sessions will be held via Zoom in 50-minute increments. Calls may be scheduled instead.

Cancellations If you need to reschedule your session, please give me at least 24 hours' notice. If you have an emergency, I will work around it. If you must cancel a session, I will reschedule it. Sessions which are not cancelled in advance cannot be rescheduled and you will be charged. You must reschedule meetings within the given month, or the meeting will be forfeited. If you are late calling in, I will not be able to make up the missed time at the end of the call.



Coaching Agreement (cont.)

Termination Clients may cancel at any time. Cancellations must be in writing via email.

Confidentiality The Coach recognizes that The Client may have the following: future plans, business affairs, customer lists, financial information, job information, goals, personal information and other proprietary information. The Coach will not, at any time, either directly or indirectly, use any information for The Coaches own benefit and will keep such information confidential. (The confidentiality statement shall be as confidential as the applicable state or federal laws allow).

Relationship The CLIENT HAS BEEN MADE AWARE THAT THE COACHING RELATIONSHIP IS IN NO WAY TO BE CONSTRUED AS PSYCHOLOGICAL COUNSELING OR ANY TYPE OF THERAPY. In the event The Client feels a need for professional counseling or therapy it is the responsibility of the Client to seek a licensed Professional.

Guarantees Coaching results are not guaranteed. Client enters into this agreement with the understanding that they are responsible for creating their own results. The Client also agrees not to hold The Coach liable for any actions or results for adverse situations created as a direct result of the coaching or any specific referral given by The Coach.

The Client has read and agrees to the above.

Name _____

Signature _____

Date _____



Client Interview

CURRENT SNAPSHOT

What are the three biggest changes you would like to make in your life?

1. _____
2. _____
3. _____

List three goals you would like to achieve in the next three months.

1. _____
2. _____
3. _____

If you could change one thing in your life right now, what would it be?

How willing are you to do what it takes to change your situation?

How close/far does success seem to you, in your current life/career situation?

How would you rate your happiness on a scale of 1 to 10?



Client Interview (cont.)

In one sentence, how would you describe your previous year?

What irritates you?

1.

2.

3.

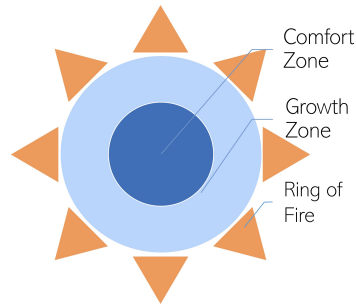
What events in your life have been the most influential? Why?

What two or three people have had the greatest impact in your life? Why?



Client Interview (cont.)

SWEET SPOT



What is in your comfort zone now? What are you really good at, without much effort? These are things you feel comfortable, confident and at ease doing.

What is in your growth zone now? These are things that require intention and attention to execute effectively. To do them, you need to grow, stretch, and develop new skills - physically, intellectually, emotionally, and spiritually. This is where most of us feel more awake, inspired, engaged and alive.

What is in your ring of fire? These are things that cause stress and panic.

Client Interview (cont.)

SWOT

List at least three of each

Strengths - What are you good at?

1. _____
2. _____
3. _____
4. _____
5. _____

Weaknesses - What aren't you good at?

1. _____
2. _____
3. _____
4. _____
5. _____

Opportunities - What are you learning to be better at?

1. _____
2. _____
3. _____
4. _____
5. _____

Threats

1. _____
2. _____
3. _____
4. _____
5. _____



Client Interview (cont.)

NO HOLDS BARRED

If you only had five years left to live, what would you do?

If you had unlimited money, what would you do?

If you could design your dream job, what would it be?



Let's get started!

