

Welcome to Coaching



Welcome

This packet includes:

- Coaching definition
- Range of deliverables,
- Pledge of ethics,
- 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. If you are late calling in, I will not be able to make up the missed time at the end of the call.



Coaching Definition & Method

Executive coaching is intended to support leaders in making decisions and advancements when existing support is unavailable or inappropriate.

Coaching begins with the assumption that clients, especially executives, are whole, wise, and highly knowledgeable about the nature of their own personal and professional development.

Therefore, the coach's primary role is to draw out the leader's wisdom through inquiry, curiosity, gentle provocations, and challenges that help the leader to stretch into their best capacities.

To do that, we introduce or co-create self-observation exercises and behavioral practices. I approach coaching from a holistic lens, attentive to the leader's interior life (physical, emotional, cognitive, and spirit) as well as how their interior reality is expressed through their physical presence and behaviors. I seek mutual understanding regarding the dynamics of the organizational culture and systems (including policies and practices) within which the executive leads.

These roles are distinct from consulting, advising, therapy, or counseling. However, coaching may address personal issues or life conditions that have an impact on a leader's professional effectiveness, and can at times work in conjunction with consulting.

My approach to leadership coaching includes the following:

- Determine client's commitment to the coaching process to be open to doing the work to achieve the desired goals.
- Identify with client the high leverage influences, behaviors, or factors that will provide the most strategic benefit for the client.
- Partner with the client in understanding and responding to input, feedback, and other external stimuli to best achieve their goals.
- Support the client in reaching their goals.
- Conduct regularly scheduled coaching sessions by phone or zoom.
- Be available to the client for needed coaching and consultation between regularly scheduled sessions.

Range of Deliverables

PERSPECTIVE:

The Coach helps the Client look at a situation in fresh or different ways or contexts.

VALIDATION:

The Coach validates via encouragement and acknowledgement.

MESSAGE:

The Coach offers reflections and observations when welcome.

ENERGY:

The Coach provides energy and support as needed.

SOLUTION:

The Coach supports the client developing solutions to a problem or issue.

PLAN:

The Coach supports the Client developing a plan of action.

STRATEGY:

The Coach supports the Client developing a strategy.

STRUCTURE:

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

RESOURCE:

The Coach introduces books, tools, and assessments when welcome.

OPTIONS:

The Coach helps the Client expand the number of options the client thought they had.

CARING:

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

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.

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

Coaching Agreement

Name _____

Address _____

Email _____

Phone _____

Birthday (optional) _____

Session Procedure Sessions will be held via Zoom in 30-60 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. If you are late calling in, I will not be able to make up the missed time at the end of the call.

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 Coach's own benefit and will keep such information confidential. (The confidentiality statement shall be as confidential as the applicable state or federal laws allow). The Client will have sole discretion to share or not share feedback, assessments and any other information related to the coaching process. This is essential to building the trust needed for an effective working relationship between the client and the coach.



Coaching Agreement (cont.)

Relationship Client understands and agrees that coaching is not therapy, psychological counseling, or social work, even though the coaching work may address personal issues or life conditions that impact on professional effectiveness. Client further understands and agrees that coaching conversations do not constitute legal, financial or business advice. In the event Client desires any of the aforementioned services, it is Client's responsibility to seek a licensed professional other than Coach.

Hold Harmless Client agrees to hold Coach harmless and exonerate them from any liability occasioned or claimed in connection with the coaching provided under this agreement.

Terms Client agrees that the coaching will be offered in exchange for a fee to be payable in advance on a monthly basis.



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

This is an optional exercise designed to help you begin to think about things differently. It does not have to be completed and if completed, does not have to be shared with your coach.

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.

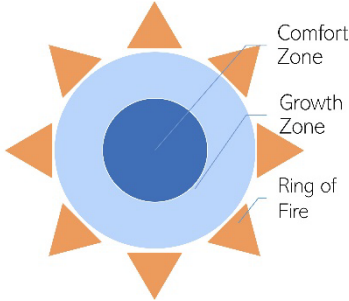
3.

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!

