

Putting Together a Welcome Packet

Below are suggestions with the exception of the Coaching Agreements. Some are included in the Real Balance Tool kit. You can experiment with the Real Balance tools or use them as models to create your own. Your organization may provide customized versions of some of these tools

Item	Included in Real Balance Tool Kit	Required/Recommended/Totally Optional	Value
Written Coaching Agreements form	x	Required	<p>This is a Core Coaching Competency for both the ICF and the NBHWC</p> <p>At a minimum it:</p> <ul style="list-style-type: none"> Ensures the client is aware of what coaching is about, role and responsibilities of the client and the coach Clarifies confidentiality Specifies how, when, where a coaching will be conducted, any fees and payment structure, cancellation policy
Value Proposition of Coaching for your own variation	In the class Forum	Optional	Explains what coaching is about
<p>Real Balance Welcome Packet including or your own variation:</p> <ul style="list-style-type: none"> Client contact information Health & Wellness section Powerful questions regarding what the client would like to get from the coaching engagement & eliciting who the client is and what is important to them 	x	Strongly recommended	<ul style="list-style-type: none"> Basic information Gets the client thinking about what they want to get out of the coaching engagement Explores how the client deals with stress and the best way to coach them Clarifies any health issues (including medications) and current lifestyle behaviors
<p>The ICF Code of Ethics</p> <p>The NBHWC Code of Ethics</p> <p>The NBHWC Scope of Practice</p>		Highly recommended	Clarifies ethical guidelines in the field of coaching for the client
A wheel (i.e. the wheel of life or another more specifically focused wheel or your organizations wheel)	X (several wheels are available)	Optional	<p>This can be very nice tool to explore:</p> <ul style="list-style-type: none"> What's working well in your client's life Potential areas of focus for the coaching engagement the bigger picture of the client's whole life

Item	Included in Real Balance Tool Kit	Required/Recommended/Totally Optional	Value
Real Balance Well Life Vision Tool or your own	x	Optional as part of the Welcome Packet	Gets the client thinking about how they want to be living their life (“begin with the end in mind”)
Connectedness Scale or Self – Permission/Self – Denial inventory	x	Optional	Based on your awareness of the client coming into coaching one or the other may seem appropriate
Strengths tools (i.e. the online free VIA inventory)		Optional	Helps the client it very clear on the strengths they can draw upon
Values Clarification Tool		Optional	Aligns with the client’s vision
Other Types of Self – Awareness exercises: <ul style="list-style-type: none"> • Passion/Motivation Questionnaire (see example below) • A Fulfilling Life Exercise (see example below) 		Optional	Gets the client connected with what’s really important to them – values and desires
Learning Style Exercise & how the client likes to go about learning new things (i.e. research, professional resources, etc.)		Optional	To identify whether your client is primarily visual, auditory or kinesthetic & to be aware of where your blind spots may be
Other personality or personality trait tools (i.e. Myers Briggs, the enneagram, stress inventory)		Optional	Some coaches are trained in the use of these tools and will integrate them in the coaching conversation

Other things to potentially educate your client on, clarify and/or explore when setting the foundation:

1. Educate your client that you may interrupt them from time to time to keep the coaching on track and to use their time most effectively. Co-create how you will interrupt the client.
2. Educate your client on negative self-talk, that it is natural and comes up when people start to make changes and that it’s important to identify and address. Explore their awareness of it in their current live. Co-create how the client would like to refer to it (i.e. negative self-talk, saboteur, the gremlin, monkey mind, other) and the best way to address it.
3. Session structure (i.e. the accountability check-in, creating the session agreement and exploring whatever focus the client chooses, identifying next steps)
4. **If you are going to switch hats**, clarify your area of expertise and credentials. Clarify that you will switch hats at the client’s request or if you feel there is some education that would be valuable to the client. You will always do so by asking permission, identifying when your switching to your expert hat, and when your switching back to your coach hat.

Passion/ Motivation Questionnaire

1. Where do you get your energy from?
2. What motivates you to take action?
3. What is going well?
4. I am at my best when:
5. I am at my worst when:

A Fulfilling Life Exercise

It's a year from now. You are looking back over the past year with a sense of satisfaction and accomplishment. It has been a great year for you – both personally and professionally. You feel very good about yourself and all that has transpired over the last 12 months.

You sit down to write a letter to your best friend, describing the year. The letter starts with:

Dear _____

“This has been a most wonderful year for me....”

What were the highlights?

What were the obstacles you faced and overcame?

Who did you have to be to get to that place?

Has there been an underlying theme for the whole year? What is that thread?