

Session 4: How to structure the first appointment with a Client.

The intake or foundation appointment is your opportunity to get to know your client and see if the two of you are a good fit for coaching. You will discover what is important to the client and how you can serve him/her as a coach. You will also be “training” your client to be in a coaching relationship with you. This is the beginning of co-creating the relationship that the two of you will continue to design as long as you work together.

The value of taking time with the intake appointment cannot be overstated. Everything that follows in the relationship begins here. As a professional, you should be clear about what your ground rules are in the coaching relationship, what you expect from the client and what the client can count on from you. Discuss confidentiality and the ethics and standards that guide your behaviour.

Now is the time to start creating trust. You will want to set a foundation of honesty to build upon. Communicate to your client that the coaching will be formed by the two of you together. Invite them to make requests and ask for changes. You are not providing a standard service or product, rather the relationship you have with this client will be unique. The two of you will tailor-make an alliance that is intended to serve them. This is true even if the company is paying the bill.

The intake appointment differs from later coaching in that you will be setting the agenda for this appointment. You may have written work that the client will do either before or during the intake appointment. You will decide what information you want from the client, and how to use the time. It is useful to tell the client this at the beginning of the appointment.

To create your own intake or foundation appointment, choose from the structures we explore here, or create your own. Decide how long the session should be. Typical intake appointments are one and half to two hours, but one coach does a ½ hour intake over two days. Whatever you decide for your overall time frame, choose how much time you will allocate to each section. Remember that this is a map, a plan, and few if any appointments will follow the plan exactly.

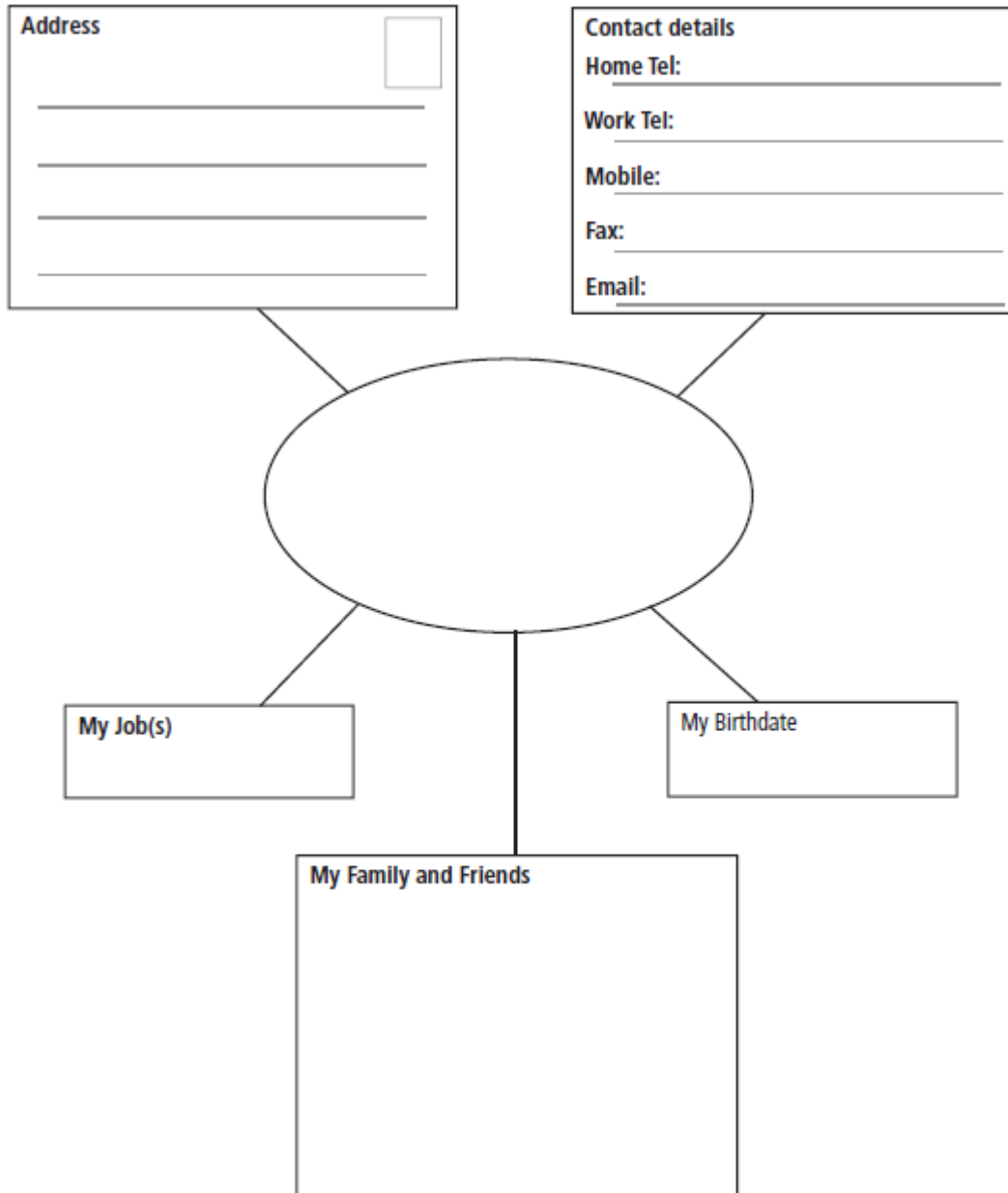
We recommend that you collect the following information and work through the following exercises with your client:

- (1) Information Mind Map
- (2) Coaching Contract
- (3) The Balance Wheel
- (4) Values
- (5) Unique Abilities
- (6) Primary Focus for Coaching

You may want to add an NLP exercise on well-formed outcomes or use a timeline exercise to explore the client’s vision. Think about what you want to know to lay a foundation for working with this client.

Information Mind Map

We recommend that you collect the following information from a client as a minimum:



Coaching Contract Template

We strongly recommend that you agree a contract with your clients so that both you and your clients are clear as to what the expectations are:

I CLIENT am committed to creating a coaching alliance with COACH that will support me as I clarify and realise my goals and move steadily toward living exactly the life I want to live. COACH agrees to hold all content of our sessions confidential, to the extent permissible by law.

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

I agree to an initial intake appointment of two hours yes no

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

- Learning about my own motivation yes no
- Noticing my values and what is important to me yes no
- Co-designing strategies that will support me yes no
- Refining and changing when a strategy doesn't fit for me yes no

I give COACH permission to:

- Challenge me with powerful questions yes no
- Request that I take action yes no
- Hold me accountable for actions that 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 £ ___ per hour , 2 hours totalling £ ___ yes no
- 3 sessions per month, each 30 minutes long yes no

I agree to the following scheduling arrangements:

- I will re-schedule any appointments 24 hours in advance yes no
- The final call at the conclusion of our coaching alliance will be a completion call yes no

Make sure you have included:

- Your intake materials
- New clients – cheque for intake and 3 months (£ ___)

I will review the intake materials and contact you to schedule an intake and reserve a regular coaching time

Client _____

Date _____

Coach _____

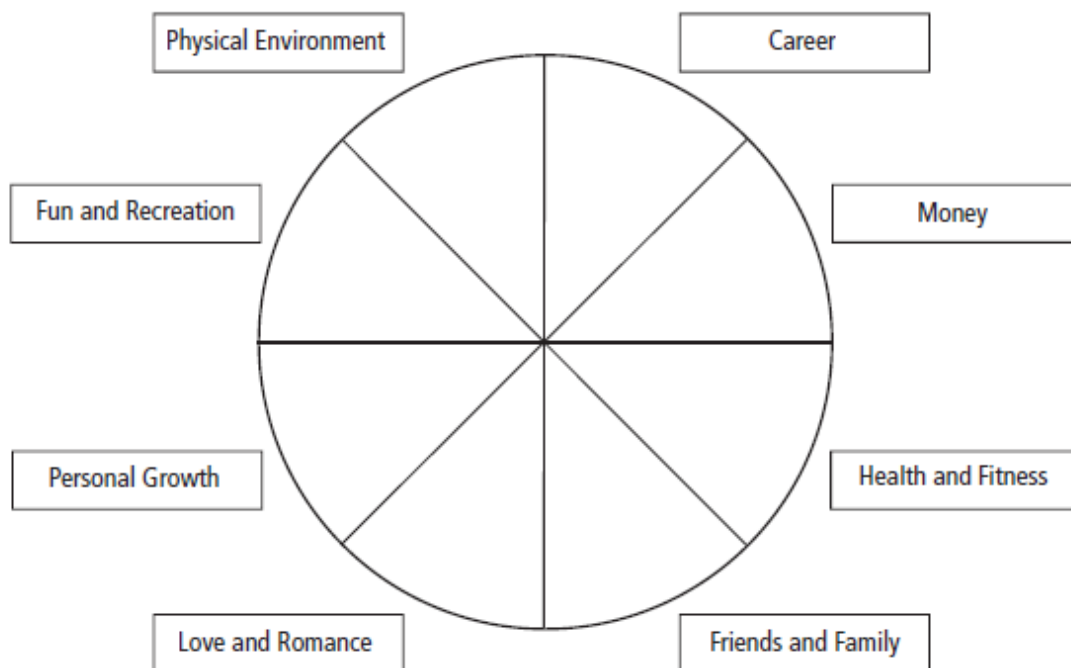
Date _____

Balance Wheel

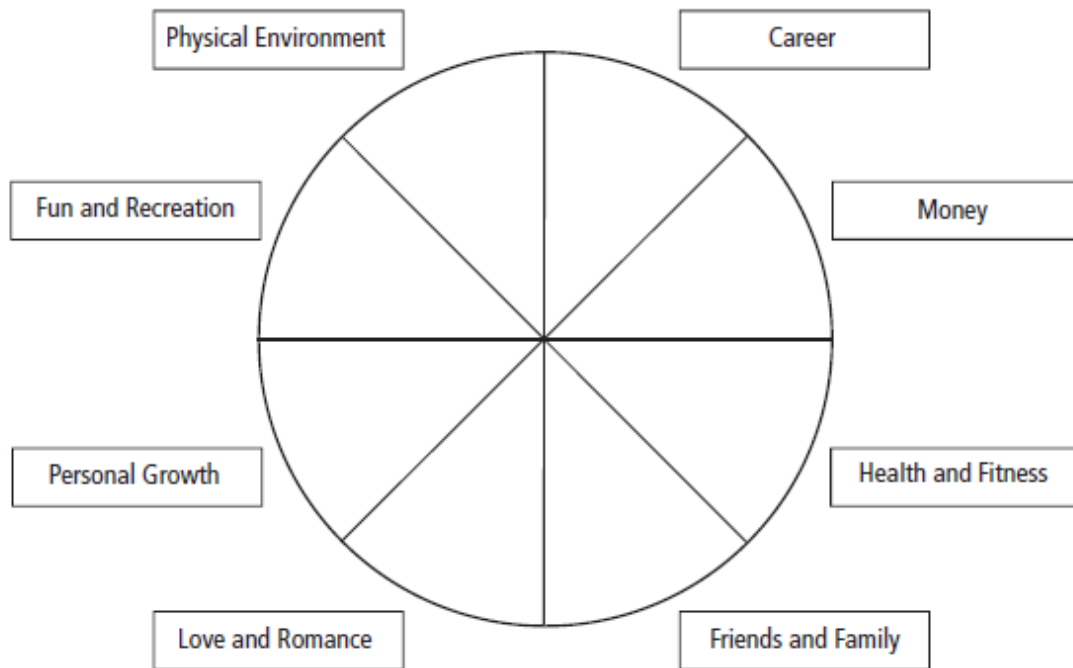
The Balance Wheel is your first opportunity to invite your client to assess what is at this moment in his or her life. As a Coach, you can stress that this is their assessment, not anyone else's. This inventory asks how satisfied THEY are, right now, according to their standards.

This wheel changes day by day and year by year. Yes to and no to choices move wedges out of balance and you correct.

The eight sections in the wheel represent Balance. Seeing the centre of the wheel as 0 and the outer edge as 10, ask your client to rank their level of satisfaction with each life area by drawing a new outer edge (see example) The new perimeter of the circle represents the Wheel of Life. The objective is to illustrate to your client how bumpy their ride would be if this were a real wheel.



Balance Wheel



Coaching Tips

- What did you notice from the wheel?
- How fulfilled is your life right now?
- So where are you out of balance?
- What do you want to change?
- How satisfied are with your current state of balance?
- How do you prioritise these wedges?
- How would your life be different if you had 100% in all of the wedges?
- Which of these wedges requires immediate attention?
- What actions could improve some of the scores?
- How would your life be different if you created a single change that would give more balance?
- If this wedge were to be the right size, how would your life be different?
- How would it enhance what is going on in your life?
- Which wedge has the greatest leverage (big effect)?
- Is there anything you can add?

Values

Our values help us to 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 start to feel resentful, or frustrated, or perhaps just a persistent niggling that something isn't right. If you are not honouring your values when you make choices about activities and relationships, you will get a sense that something is missing or wrong in your life. For our purposes then your values mean the qualities that define you, that are at the core of who you are. Without these things, you would not be you.

While it is enormously helpful to know our core values, it's not always easy to identify them.

Ask your clients to create a list by answering the questions and thinking about the ideas below. Explain that the list will be a work in progress. Also, suggest that values don't have to be a single word – they could be a string of words or sentences.

Coaching Tips

Try thinking about the following

What is important to you?

What do you care about?

What do you want in your life?

Peak Experiences

When has life been rich, full, exhilarating, flowing? Pick a time. There may have been challenges, but you were on a roll. It may have been a few minutes, or hours, or weeks. What was important about that experience? What values were you honouring?

Crazies

What drives you nuts or makes you angry or frustrated? Think about one of these things. What value is being violated? What is being stepped on? What is it that you can't live with and still be true to yourself?

Invisible Values

What is so much a part of who you are you haven't even thought to put it on the list?

Your Unique Abilities

Ask your clients to make a list of all the life skills that they possess. To facilitate this process you can ask the following questions:

- What are you especially good at?
- What do you do well?
- Are you friendly?
- Optimistic?
- Do you facilitate well?
- Are you tidy?
- Methodical?
- Do you have big visions?

Ask them to start writing a list before showing them the list provided on the next page. Then, ask them to notice any abilities that they might have overlooked. Suggest that they choose ten to fifteen words from the list that stand out as their unique abilities.

Able to choose	Enthusiastic	Polite
Accountable	Ethical	Powerful
Acknowledges	Excited	Practical
Adapts well	Expressive	Presents self well
Alert	Facilitates	Proactive
Anticipates wants and needs	Faithful	Problem-solver
Appropriate	Financially independent	Productive
Asks for what he/she needs	Firm	Punctual
Assertive	Flexible	Re-creates
Astute	Generative	Refines
Attentive to details	Generous	Reliable
Authentic	Happy	Resourceful
Aware	Healthy	Responsible
Begin things	Honourable	Satisfied
Boundaries clear	Independent	Seasoned
Builder	Initiates	Self-confident
Calm	Innovative	Self-generating
Candid	Inspiring to others	Self-reliant
Capable	Integrates	Sense of humour
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	Trustful
Emotionally stable	Organised	Validates
Empathetic	Patient	Versatile
Empowers	Peaceful	Visionary
Energetic	Perfect	Vital
Engaging	Planner	Willing

Introductory Questions

Pam uses the following questions both with clients and to introduce live trainings. Read as many books as you can, borrow other people's questions and begin to create your own.

1. What would you do and how would you change your life if you won the lottery tomorrow – after you have taken a break!
2. What have you always wanted to do in life but been afraid to attempt?
3. What activities throughout your life have given you the greatest feelings of achievement?
4. What would you do if you couldn't fail?
5. What are your three most important goals in life right now?
6. What is the one thing you have always wanted to do and somehow keep managing to put off?
7. If your life was perfect in every respect and you were too what would it look like?
8. Who do you need to be to live the life that you want?
9. If you were standing in front of a fountain and threw a coin in what would you wish for?
10. What will it be like when you catch the wave?
11. What are you tolerating?
12. What do you want more of in your life?
13. What don't you want more of?
14. What do you want less of?
15. What don't you want less of?

Primary Focus

Finally, ask your clients to identify the areas that they want held as their main focus for the next three month period. For each focus area, ask them to provide

- 1) a simple heading
- 2) a brief description of a measurable result, their evidence that the goal has been or is being reached.

These focus areas could be specific projects or ongoing quality of life shifts

For Example:

Outcome - 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

Outcome - I feel more in control, less in overwhelm

Ongoing Evidence – I have a system to follow 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 recharge. I feel more relaxed.

Primary Focus

1)

2)

3)

4)

Choose Carefully

At the close of the intake or foundation appointment it is good to re-assess how both of you feel about moving forward and working together. Is this a good coach/client match?

Make your final decision about a client at the intake, and if you choose not to work with them you may decide not to charge them for the intake.

When you are starting, you will have all kinds of clients. Try to pass on the clients you are not excited about working with. There is a better coach for them, and that time in your calendar will fill.

If you do not consider this potential client to be resourceful and whole, you are not the coach that they deserve. And the work you normally love will become a struggle.

Intake Checklist

1. Setting the Frame (10 minutes)

Welcome Rapport

What to expect from the session:

“Today will not be a typical coaching session. We have a foundation to build. I will see places to coach, and I will try to focus on the intake agenda and hold those issues for future calls. As you become aware of coaching topics, point them out so that we can address them as we move forward with coaching”.

What to expect from coaching:

“I am not an expert or a consultant. We will create this relationship together. The value that comes from coaching depends on how consciously you use the process. If you love exploring and learning about yourself the rewards will be great. Many people come to coaching looking for answers. I’ve found that as we discover more, instead of finding answers, we often find richer and more interesting questions. And so you will notice that, rather than giving you answers, I’ll be asking you a lot of questions”.

Your background and training:

Briefly speak about your experience as a coach and any other relevant details about your background.

2. Creating the Contract (10 minutes)

The Agreement:

“These are my expectations regarding our relationship”. Go through the agreement section by section or point by point:

Confidentiality:

Say it again, even though it is in the agreement. Does confidentiality mean that you not disclose that this individual is a client? You may want to, it is your (and your client’s) decision. What are the legal limits of confidentiality in your country?

Co-Creating the Relationship:

“Today is the beginning of a process that will be overt and conscious for a month or so and less conscious throughout our coaching relationship. I am a tool, a chisel that you need to point. I want you to train me to coach you. I can be used to hold you accountable for actions you want to take.

You may want to use your time to reflect. We can brainstorm, or design strategies and make plans. I won't have your answers, you will, and I will be there for the discovery. This starts next week. You will decide the agenda next week on our call, and on all the other calls". (Offer a preparation sheet as an option).

3. Discovering who your Client is (90 minutes)

Introduce your forms:

Include for example the MindMap, the wheel, a values exploration, the primary focus, and a unique abilities exercise. Give your clients the option to do pre-work with these forms or to do them during the session.

You may want to offer different discovery tools in your intake i.e. a timeline exercise, the LAB or other meta-programme profile, the MBTI or Disc or any other assessment tool that you are certified to use.

See Introductory Questions below.

Go through each of the discovery areas:

Elicit from the client the information requested in each of your forms. If the client has done pre-work, go over their discoveries and ask questions to deepen the learning from the exercise. The client should be doing almost all of the talking during the discovery portion of the intake.

4. Moving Forwards (10 minutes)

About change:

Talk about the process of change, being human, choosing a pace, ups and downs, learning curves, habits, being compassionate with yourself.

Closing:

Leave them with an enquiry, an open ended question that they can ponder for the next week. See if they want to identify and commit to at least one small action and be accountable for it. Ask them to prepare an agenda for the next call. Introduce the preparation form. They can dash this off 5 minutes before the call; preparation is very important, but it does not have to be time-consuming. They may want to send you this form or not. (When they do, it means you start the call off and running and often get more out of your time together).

Schedule for next month of calls:

Get paid for the intake and first month and explain the invoice process (paper, email or verbal). Did you find that difficult? Asking for money? Then get some good coaching and get over it. As a goodbye, acknowledge the client by recognising the commitment they have made, and share with them your enthusiasm at getting the opportunity to coach them. Repeat the time you will talk next.

5. Keeping Your Records (after the meeting)

Create a place where you will keep all the information about this client. Some coaches have separate notebooks or files for each client. Pam uses a loose leaf binder with tabs for each client.

File all the intake forms and the contact information and each week's preparation sheet (if they send one) and notes from each call.

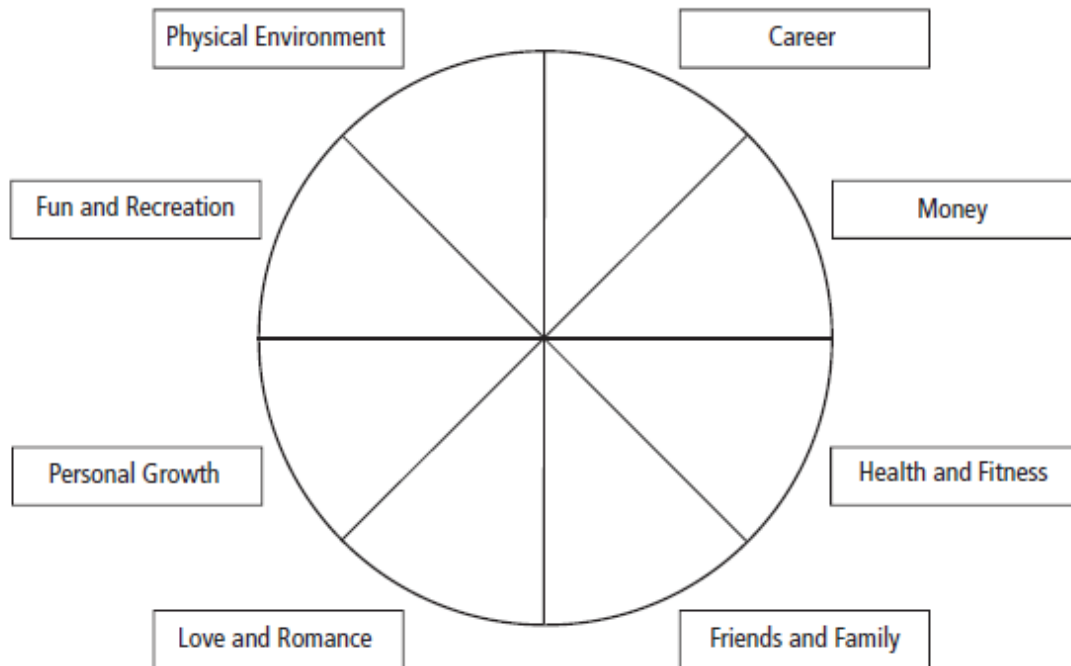
Have some way to track finances (to note when the client's fees are paid and when they are due).

Session 4: The Intake Session / Assignment

Please ensure that you have read Pages 19 – 34 and have listened to the MP3 recording before completing the following exercises:

1) Balance Wheel

a) Seeing the centre of the wheel as 0, and the outer edge as 10, please rank your level of satisfaction with each area of your life and draw a new outer edge. The objective is to illustrate how bumpy your ride would be if this were a real wheel.



b) Referring to your Balance Wheel, please answer the following questions:

- What did you notice from the wheel?
- How fulfilled is your life right now?
- So where are you out of balance?
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- How satisfied are with your current state of balance?
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2) Values

Create a list of your Values by answering the questions and thinking about the ideas below:

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Try thinking about the following

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Invisible Values

What is so much a part of who you are you haven't even thought to put it on the list?

3) Unique Abilities

Start making a list of all the life skills that you possess.

Next, look at the list provided on the next page. Notice any abilities that you might have overlooked. Choose ten to fifteen words from the list that stand out as your unique abilities.

Able to choose	Enthusiastic	Polite
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Conscious	Knowledgeable	Spontaneous
Consistent	Leader	Stable
Contributes	Learns naturally	Steps over nothing
Cooperates	Listens	Strong
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Effective	Orderly	Trustful
Emotionally stable	Organised	Validates
Empathetic	Patient	Versatile
Empowers	Peaceful	Visionary
Energetic	Perfect	Vital
Engaging	Planner	Willing

4) Introductory Questions

Please answer the following questions:

1. What would you do and how would you change your life if you won the lottery tomorrow – after you have taken a break!
2. What have you always wanted to do in life but been afraid to attempt?
3. What activities throughout your life have given you the greatest feelings of achievement?
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14. What do you want less of?
15. What don't you want less of?

5) Primary Focus

Please identify the areas that you would want held as your main focus if you were a client.

1)

2)

3)

4)