

Congratulations on your decision to work with a coach.

Coaching can truly be a transformational experience! You may be wondering, what is coaching? The International Coaching Federation defines coaching as: “Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.”

That’s my goal...to inspire you to maximize your personal and professional potential. Think about the possibilities!

As your coach, I will support you by:

- Using a client-centered focus
- Actively listening
- Asking questions
- Helping you explore options
- Helping you prioritize actions
- Facilitating guided meditation
- Asking about progress
- Being there at each step in the process
- Maintaining confidentiality
- Providing optional assessments
- Meeting in person, by phone, or by Skype



Your role is to fully participate in the coaching process. Be open-minded. Honestly respond to questions. Be willing to think of new options. Take new steps.

This process can make a difference!

In this packet you will find the following support materials:

- Coach's Background
- Code of Ethics
- Phone Etiquette & Session Guidelines
- Call Prep Form
- Coaching Agreement
- Client Information Sheets
- Energy Drainers / Gainers Exercise
- Life Balance Wheel

In order to determine if I am the right coach for you, let's do a complementary session to get acquainted.

Call me today at (678)907-2994 or by email at cmusholt@gmail.com. I wholeheartedly look forward to working with you and helping you maximize your personal and professional potential!



Coach's Background

Name: Chuck Musholt, ACH

Background: I work with individuals and groups in the field of Transpersonal Coaching to expand beyond ideas and concepts that have limited accomplishment and happiness. Before entering coaching, I worked as an entrepreneur, salesman, trainer, band director, and career consultant. With a background so varied, the common thread is influencing others to do good for them.

Here is a summary of my education and training.

Education

Certification in Transpersonal Coaching, The Wellness Institute, Issaquah, WA, 2016

Advanced Certified Hypnotist, The Wellness Institute, Issaquah, WA, 2011

Master of Music, University of New Mexico at Albuquerque, 1998

Bachelor of Music Education, Indiana University at Bloomington, 1992

When appropriate, I use tools to assist with coaching. The first is the VIA Signature Strengths, at <http://www.viacharacter.org/www/Character-Strengths-Survey>. Others will be used as helpful to each individual client.



Code of Ethics

As your coach, I aspire to conduct myself in a manner that reflects positively upon the coaching profession; am respectful of different approaches to coaching; and recognize that I am also bound by applicable laws and regulations.

Here are key excerpts from the International Coaching Federation's Code of Ethics, which I embrace. As your coach:

1. I will not knowingly make any public statement that is untrue or misleading about what I offer as a coach, or make false claims in any written documents relating to the coaching profession or my credentials.
2. I will accurately identify my coaching qualifications, expertise, experience, and certifications.
3. I will conduct myself in accordance with the ICF Code of Ethics in all coaching related activities.
4. I will not knowingly take any personal, professional, or monetary advantage or benefit of the coach-client relationship, except by a form of compensation as agreed in the agreement or contract.
5. I will not knowingly mislead or make false claims about what my client or sponsor will receive from the coaching process or from me as the coach.
6. I will not give my prospective clients or sponsors information or advice I know or believe to be misleading or false.
7. I will honor all agreements or contracts made in the context of professional coaching relationships.
8. I will carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement or contract.
9. I will respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement or contract. I will be alert to indications that the client is no longer benefiting from our coaching relationship.
10. I will maintain the strictest levels of confidentiality with all client and sponsor information. I will have a clear agreement or contract before releasing information to another person, unless required by law.



Phone Etiquette & Session Guidelines

My desire is to make each coaching session as productive as possible. Here are some things you can do to contribute to a great session.

Before the session:

- Email the Coaching Call Prep Form and any other information to the coach twenty-four hours prior to the session.
- Clear your mind.
- Remove distractions.
- Turn off other telephones.
- Arrange to be in a place conducive for coaching...quiet and confidential.
- Avoid calling on a cell phone while driving or in areas with intermittent service.
- Have a pencil and pad handy for notes.

Starting the session:

- Call as close as possible to the scheduled time.
- If the phone is busy or isn't answered, please call back in 5 minutes.

During the session:

- Please speak clearly and concisely.
- Be present, which requires FOCUS. Your center of interest should be on the session and our conversation.

Here are some useful tips:

- Turn away from your computer and desk, unless you are taking notes on the computer.
- Remove reading material.
- Avoid drinking or eating.
- Take a moment to think before you respond, if needed.

After the Session:

- Finish writing any notes.
- Make sure the next coaching session is on your calendar.
- Schedule time to follow through on your goals.
- Share your goals with others you trust.



Coaching Call Prep Form: Please E-mail to chuck@boldheartcoaching.com 24 hours prior to Coaching Call

Name: _____ Call Date/Time: _____

Next Call: _____

What I have accomplished since our last call (Wins/Successes):

-
-
-

What I wanted to complete, but did not:

-
-
-

The challenges/problems I am facing now:

-
-
-

The opportunities which are available to me right now:

-
-
-

Coach, what I want to focus on during this coaching session is:

-
-
-

What I am committed to do by the next call (to be decided during coaching session):

-
-
-

Please file this in your Coaching Folder



Client Data Form

Name:

Date:

Occupation:

Business Name:

Home Address:

Preferred Address:

Business Address:

Preferred Address:

Day Phone:

Evening Phone:

Fax Line:

Cell Phone:

E-mail address:

Okay to leave messages everywhere? If not, explain:

Preferred means of communication (circle one):

Phone

E-mail

Date of Birth:

Age:

Other Significant Dates:

Preferred Coaching Schedule on (day of week) (time of day)



Names of important people in your life (spouse, partner, children, friends, etc.)

Emergency Contact:

How did you hear about my coaching services?

What influenced your decision to work with a coach?

Have you ever been coached? If so, please describe the experience:

Do you have specific goals for the coaching relationship? If not, what goals might you now create?

What are your significant commitments?

What would your perfect life look like?

What are your dreams?

What dreams have you given up on?

Where do you want to focus first?



PERSONAL VISION STATEMENT

I strongly believe that we are each the creator and director of our own life drama able to create “on purpose” what our life will look like, feel like, and be like.

It is your opportunity and responsibility to write the script, be the producer and director, and to gather the other characters in your life drama. Some people live painful dramas or unfulfilling dramas, but if you are conscious and on purpose with what you want your life to be, it has a much greater chance of evolving into your vision.

So how does one begin designing one’s life? First of all you can begin to revisit and remember dreams and desires from your younger years. What drove you? What did you want to become? Who did you admire? Divide your life into thirds and ask yourself what accomplishments or happy events occurred in each third of your life? What values were represented? Are those values still present?

Exercise: My personal lifestyle

Read through the following sentences and answer as if your life were exactly as you would like it to be. Let this be an accurate reflection of what you envision for your ideal life. After you have completed all these pieces of your Personal Vision, you can write a summary paragraph that encapsulates all your intentions, desires and values.

1. In my family I am committed to _____ (spending time with enjoying, teaching, working with, taking care of) my _____ (spouse, partner, friends, family and/or children).
2. For recreation and fun, I enjoy _____
3. My home environment will be _____ (nurturing, comfortable, a place for entertainment, on the water, spacious, have a home office, in the city, in the country, etc.).
4. My retirement home will be _____ (a cabin in the mountains, a seaside condo, a small restored Victorian home, a large, spacious home to accommodate visiting grandchildren, and guests, a large motor home, a houseboat).
5. My hobbies, passions, interest are _____ (world travel, politics, reading, writing, sports, gardening, martial arts, etc.)
6. I will maintain (or regain) my health by _____ (exercising, eating



healthy foods, lowering my stress, meditating, etc.)

Exercise: My professional life

1. I will concentrate my practice in the areas of _____ (fill in with niche or types of clients).
2. My office environment will be _____ (spacious, comfortable, a home office, efficient, well-organized, etc).
3. My financial plans are to _____ (earn a minimum of _____ per year, save 20% of my income, leverage my investments to retire at age _____ with a yearly income of _____, allow for 4 vacations a year, buy a retirement home, etc.).
4. My business philosophy is one of _____ (integrity, leadership, dedication to my clients, providing superior coaching and modeling for my clients, being known as an expert in my specialty, etc.)

Personal Vision Worksheet

Using the information you have gathered about yourself in the preceding exercises, write your personal Vision in paragraph form. You may do a rough draft and then polish it in the weeks to come.

In my personal life I am committed to

In my professional life I am committed to



De-Cluttering - Energy Drainers

We put up with, accept, take on, and are dragged down by people and situations that we may have come to ignore in our lives rather than fix them. Now is the time to identify those things that drain your energy for positive activities. As you think of more items, add them to your list. You may or may not choose to do anything about them right now, but just becoming aware of and articulating them will bring them to the forefront where you'll naturally start eliminating, fixing or resolving them.

ENERGY DRAINERS AT WORK

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

ENERGY DRAINERS AT HOME

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.



Energy Gainers

The flip side of Energy Drainers are Energy Gainers – those things in your life that are good and give you energy for positive activities. These are items you may want more of in your life for the good that comes from them.

ENERGY GAINERS AT WORK ENERGY GAINERS AT HOME

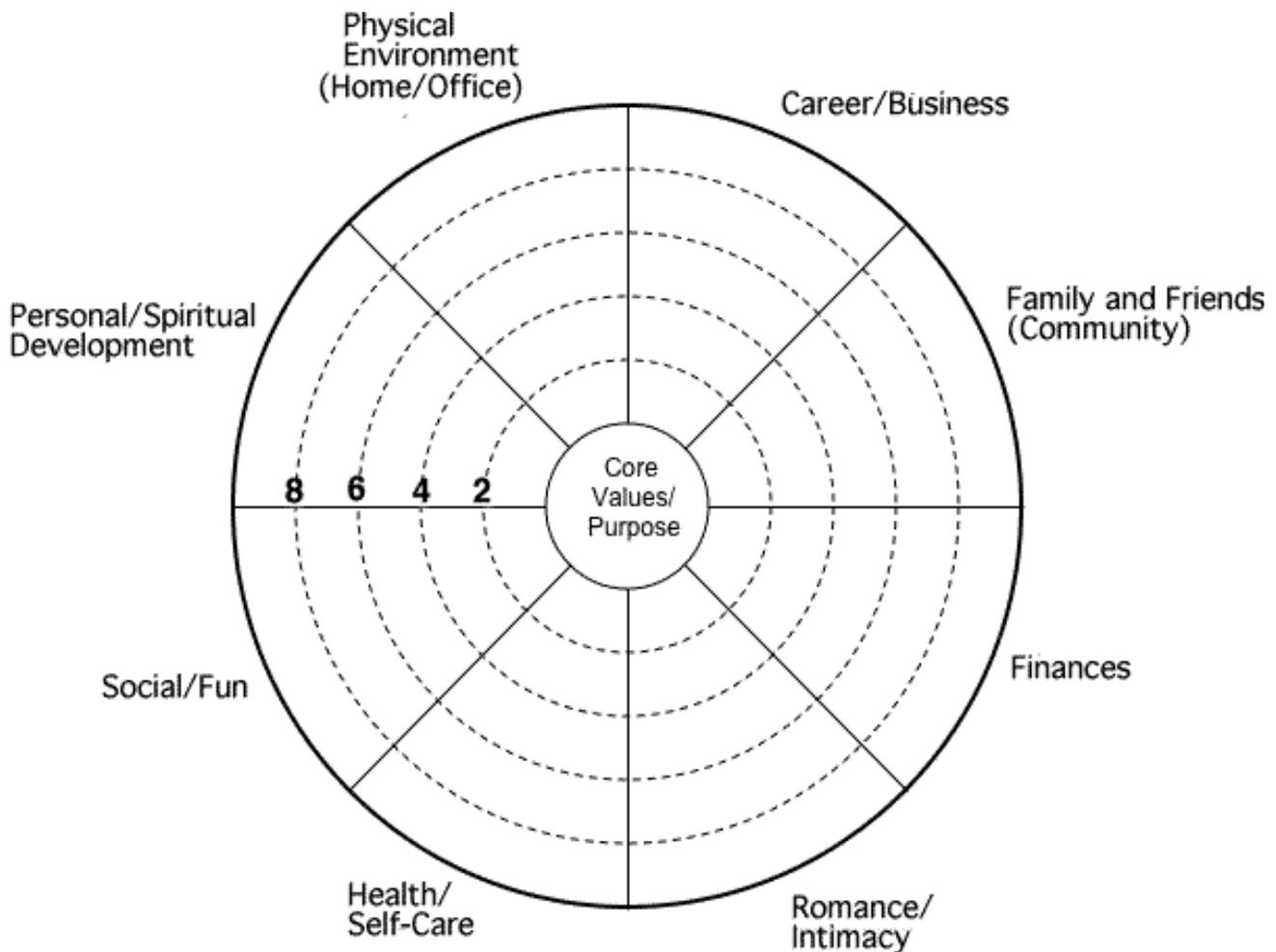
- | | |
|-----|-----|
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| 4. | 4. |
| 5. | 5. |
| 6. | 6. |
| 7. | 7. |
| 8. | 8. |
| 9. | 9. |
| 10. | 10. |



Life Balance Wheel (Coaching Mandala)

Core Values/Purpose

The hub represents your core values—each area interrelated in an ideal life. Give yourself a score from 1-10, with 1 being totally dissatisfied and ten being satisfied with that area. Shade or color in the space accordingly. We may use it to have a coaching conversation about gaps between where you are now and where you would like to be.



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After scoring each area of life and shading in the area on each spoke/value, notice the differences. If you feel satisfied with your health, then your shaded area will be toward the outside of the wheel. If you feel dissatisfied with your social life/fun, then your shaded area will be close to the center of the wheel. Then, look at the shaded areas as a whole, to see a circle, or lopsided oval, or whatever shape comes out of connecting the dots around the wheel.

Imagine using this wheel as your mode of transportation in life. We travel through life this way, bumpy if out of balance, feeling strong sometimes but also stumbling.

This can be used to evaluate where you are now, and also to focus on where you want to be.

Later, this can be taken to evaluate progress toward goals, or changes in goals.

