



PEOPLE FIRST
COACH LLC

Welcome !!

Congratulations on your decision to work with me as a coach. I am optimistic about what we can accomplish in our work together. It is important that we share the same understanding about how we will work together.

How can you get the most out of coaching?

- Make your coaching a priority. Take this as seriously as work or family.
- Keep your coaching appointments and show up on time.
- Do all your fieldwork, every week.
- View your coaching time as something truly special, a gift.
- Pay close attention to what's working for you and what's not – and talk about it openly with me.
- Share with others what you're experiencing in coaching and ask them for support.
- Take notes or journal about what you notice or experience.
- Say no to any extra obligations if they might cut into your coaching focus.
- Take good care of yourself, especially in terms of sleep, diet and exercise, so you have a good store of energy.
- Be open and curious about ideas and trying new things; withhold judgment until you've really given something a shot.
- Practice self-compassion; begin to treat yourself and talk to yourself as you would a good friend.
- Take initiative – change happens when you take action.
- Arrive at our sessions as calm and centered as possible, even it's as simple as taking a deep breath before picking up the phone.
- Have fun and bring your creative side to our sessions.

Here's what you can expect from me as your coach:

- I will listen a lot.
- I'll be fully present and bring my best to our meetings.
- I'm here in total support of you, your goals and your development.
- I will ask you questions that aim to get at your truth and lead to your further development.
- I don't have an agenda other than the one you set for us.
- I will be open and direct.
- I'm not going to tell you what to do.
- I might offer you possibilities, information or different ways of thinking about something, yet ultimately you are the person in charge of deciding what's best for you.
- Sometimes I may challenge you or ask you to try something – you can always say no or renegotiate with me.
- I always aim to create a safe, non-judgmental coaching space. I am here to encourage you and facilitate your learning, not to judge.
- I'm always going to ask you what you've done well or what you'd like to celebrate. Creating habits where you regularly notice your progress will be one of the biggest contributors to your success.

What to expect from our sessions:

- At first you might feel a bit uncertain after our coaching sessions. This is okay. Let me know your questions or concerns.
- You might wonder if "you're doing it right". That's normal too. There's no real "right" or "wrong" to coaching. Everyone is different. The most important factor in your success is your belief in it, and the time and energy you put into taking action.
- Coaching isn't just limited to our sessions, it goes on throughout your week. Continue taking action, being thoughtful and noticing what's going on.
- You might end a session feeling stirred up, or peaceful or energetic. It's all okay. Let yourself feel all these things.
- Our sessions are your space to experiment with the changes you want to make in your life. Maybe it's being kinder to yourself, maybe it's carving out time just for you, maybe it's keeping your promises or maybe it's speaking more honestly. Whatever it is, you can use this as your learning lab.

So we can have a strong start, this Welcome Packet includes a few documents that I would like for you to read, complete and return to me prior to our first call. Completing these forms will help me to understand what is important to you, how to be more focused as we begin our coaching relationship and how to utilize our time well as we move towards accomplishing your goals.

I invite you to answer each of these questions as clearly and thoughtfully as possible. There are no right or wrong answers. While this may be a thought-provoking exercise, it is not intended to be stressful. You may be as brief or as lengthy as you like. You can also choose to skip a question.

Please feel free to add pages and not be limited to the amount of space I've given you. Most clients tell me they have completed the form in 1 – 3 hours. Some have worked with it over a few days because they enjoyed the process and it felt good to take their time. Almost everyone has said that they felt this was especially helpful in gaining clarity about where they currently are and what it is they would like to accomplish in our coaching sessions.

After completing this form, please return it to me by email ***at least 48 hours prior to your first session.***

One more note: my practice fills by referrals. If you are benefiting from our relationship, I would appreciate your referring friends and colleagues to me. I know many qualified coaches and will talk with anyone about coaching and refer them to a coach who I believe is right for their needs, whether that's me or another coach.

Thanks again for choosing me as your coach. I look forward to working with you!

Warmly,

Robert

Please fill out pages 2 to 13 & Page 16 for our first call.

Part 1: Forms to be filled out and returned to me:

Email: Robt002@gmail.com

All Information is confidential and will be read only by me.

Client Information:

Name: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone Numbers & Contact:

Home: _____ Office / Work: _____

Cell Phone: _____

Email Address: _____ Web address: _____

I'm single

Spouse / Partner's Name: _____ Wedding Anniversary: _____

Children's Name(s): _____

Work Information:

Employer Name: _____

Nature of the work you do: (Brief description)

Payment:

Invoices will be sent 3-7 days prior to our scheduled call. Payment is due upon receipt, through PayPal. You may use credit cards on PayPal. If you will be paying by check, alternate arrangements can be made. Payment confirms appointment and is non-refundable. If payment is not received within 24 hours of our call, appointment will be cancelled and will need be rescheduled.

Coaching Agreement (Please sign and return)

1. Services:

The services to be provided by the Coach to the Client are strategic in scope where the Coach facilitates the Client's personal and or business growth, and problem-solving abilities to achieve the Client's goals using various coaching and diagnostic methods. The services are to be delivered primarily via the telephone / live and secondarily via email.

2. What I ask of You (client)

Timeliness

It is important for us to keep our appointments, for your benefit as well as the benefit of my other clients. 24-hour notice is required to cancel an appointment; I reserve the right to charge for the session cancelled with less than 24-hours notice. If you are delayed for an appointment, please let me know by calling (and leaving a message) or texting me at 804 349 8776. I do my best to schedule clients with enough buffer time on either side of an appointment.

Completion of Assignments

It is up to you to complete assignments as given. Whenever possible, I would appreciate getting your assignment at least 2 hours before the appointment, so I can review the material before we speak. Prep sheets are a must. (My experience has shown that non-prepped calls do not produce the value as prepped calls.) Clients who get their assignments completed outside of our session get far more out of the coaching program.

Fees

My coaching fee is based on a 50-minute session. Invoices will be sent 3-7 days prior to our scheduled call. Payment is due upon receipt, through PayPal. You may use credit cards on PayPal. If you will be paying by check, alternate arrangements can be made. Payment confirms appointment and is non-refundable. If payment is not received within 24 hours of our call, appointment will be cancelled and will need to be rescheduled.

The fees for coaching are established at the beginning of our coaching relationship. I reserve the right to raise fees. Fees are per session or by package as designated on the invoice.

Feedback

Give and ask for feedback as much as possible. I want to know when something works for you, as well as if it is not working.

Referrals

My compensation as a coach is two-fold. First is the coaching fee for service, the second is by the referrals you give once I earn your trust. Many of my clients choose to refer my services to others. I like to ask for referrals outside of our coaching sessions, so the focus of our work is exclusively on you, and the results you want. Whether you choose to refer people to me or not, I would like you to know how the referral process works. As you have experienced, the first session is always free, and I will first have a discussion with anyone who is interested in my services so that both they and I can determine if there is a good fit between their needs and my experience. If there is a fit, they will become clients. If there isn't a good fit, I will do my best to refer your referral to another coach who may fit their needs.

In all cases, I will do my best to satisfy your referral's questions, needs, and concerns. Referrals form a substantial part of my practice and come from clients whose trust I have worked hard to build. You can be assured I will go out of my way to take good care of anyone you send my way.

2. Confidentiality:

The client *agrees* to treat the coaching relationship as privileged. Webster's dictionary definition of privileged is not subject to the usual rules or penalties because of some special circumstance; *especially*: not subject to disclosure in a court of law.

Coach agrees to maintain the ethics and standards of behavior set by the *International Coach Federation* www.coachfederation.org/ethics. The Coach will not at any time divulge, either directly or indirectly that the Client and the Coach are in a Coaching Relationship without the Client's express permission. The Coach will not use any of the Client's personal information for the Coach's benefit or disclose or communicate in any manner any information to a third Party unless the Client provides written permission to disclose with exception of the credit card service provider, the Credit Card Company and/or bank the Client and Coach are using to process payments.

Our calls and information you share with me are kept confidential to the extent allowed by law. Attorney subpoena for client privileged information will be presented with client approval only. In situations where a client is subpoenaing records, this request will be made to my attorney. I subscribe to and am governed by the International Coach Federation's Code of Ethical Conduct. (<http://coachfederation.org>) This code includes a prohibition against disclosing that you are a client, without your express permission.

3. Content:

The Client is aware that the Coaching Relationship is in no way to be construed as psychological counseling or any type of therapy or a part of the medical field. In the event the Client feels the need for professional counseling or therapy, it is the responsibility of the Client to seek a licensed professional. Coaching results are not guaranteed. The Client enters into Coaching with the understanding that they are responsible for creating their own results.

4. Communication Procedures:

The Client will call the Coach on the scheduled day and time - at the number below. The Client may also email the Coach anytime as the address below. The Coach will make every effort to respond to emails and voice messages within 48 hours excluding weekends and holidays.

Coach contact methods:

Session Call Line:

804-349-8776

Email: Robt002@gmail.com

5. Session Cancellations, Rescheduling and Lateness:

In the event either Party needs to cancel and/or reschedule a session or has an emergency, both parties agree to give the other Party a minimum twenty-four (24) hours notice (if possible) to reschedule the session at another mutually agreeable date and time.

6. Refund Policy:

Since you primarily pay by session (no contracts), there are no refunds. If you have purchased a package (resume, etc) they you may receive a partial refund after the first call if you do not find value.

Coaching Client

Robert Tignor, ACC
People First Coach, LLC

Background Information and Thoughtful Questions (Please fill out and return to Me)

(Please answer the questions to the best of your ability; if the question is not appropriate to our work or is too personal- Please skip it.)

Current Occupation/ Profession: _____

Education: ___ High School; ___ BA/BS; ___ MA/MS; ___ Advanced Degree: (Specify) _____

General health & well being:

Have you ever worked with a coach?

Have you ever worked with a counselor/ therapist? (If yes, please describe within your comfort)

What accomplishments are you most proud of, and why?

What do you feel are your *personal* strengths and assets?

What do you feel are your *professional* strengths and assets?

What are your guiding values? (The important values that make you who you are?)

Things I Really Enjoy Doing:

Things I Can Do at the Good-to-Excellent Level:

As your coach...what could I bring that would be most valuable to you? Choose one to three and highlight:

<i>Challenge</i>	<i>Accountability</i>	<i>Focus</i>	<i>Support</i>
<i>Inspiration</i>	<i>Direction</i>	<i>Sounding board</i>	<i>Ideas/brainstorming</i>
<i>Validation</i>	<i>Mentor</i>	<i>Advice</i>	<i>Strategies</i>

What do I really need to know about you that will help me most in coaching you?

What do you see as *your* role in the coaching process?

How have you been motivated in the past to reach difficult goals, make difficult decisions, or do difficult things?
How can we best utilize that motivator now?

Where are you most irresponsible?

How will you sabotage our professional relationship?

How willing are you to make substantial changes?

Any thing else I should know to coach you more effectively that hasn't been covered previously?

10 GOALS TO REACH IN THE NEXT 90 DAYS

Name: Robert Tignor Date: May 2018

Goals: Setting goals tends to outcomes in four ways:

- Choice: Goals narrow attention and direct efforts to goal-relevant activities
- Effort: Goals can lead to more effort and you may work more intensely towards the goal than you would otherwise.
- Persistence: You may work more intently and focused if pursuing a goal.
- Cognition: Goals can lead individuals to develop and change their behavior.

What are the goals you most want to set for yourself for the next 90 days?

Please think about:

What is the focus- Money Love, Health, or Career?

What type of goal- Internal, External, or Skill? *

Does this goal align with my personal/business foundation?

Am I setting this goal for the "right" reasons?

Does this goal meet existing wants and/or needs adequately?

Is this goal attainable?

Is this goal big enough, or too big?

Do I have a vision for this goal?

Is this goal a priority?

Start Date	Finish Date	The Specific Measurable Goal	Completed	Focus: Money, Love, Health, or Career	TYPE: Internal, External, or Skill Based
		1.		M L H C	I E S
		2.		M L H C	I E S
		3.		M L H C	I E S
		4.		M L H C	I E S
		5.		M L H C	I E S
		6.		M L H C	I E S
		7.		M L H C	I E S
		8.		M L H C	I E S
		9.		M L H C	I E S
		10.		M L H C	I E S

Types of Goals

Internal: Changing on the inside; being different or better; growing up, attitude changes: raising standards, clarifying values (these goals involve personal foundation, specifically values and integrity).

External: Goals involving the physical self. These can be both wants and needs: new car, better job, more business, savings, clothes, house, etc.

Skills: Goals that help you do something better: communication, relating, managing, decision-making, problem-solving, etc.

The "CLEAN SWEEP" PROGRAM

A. PHYSICAL ENVIRONMENT

- I live in a home/apartment that I love.
- I live in the geographic area I choose.
- I live in a neighborhood that is safe and does not cause any stress.
- People feel comfortable in my home.
- I am not tolerating anything about my home or work environment.
- The place I live has an area where I can go to have peace, read, work on personal productivity or inspiration.
- The place I live has an area where I can go to be entertained and have fun (TV, music area, games.)
- I surround myself with music, art, hobbies which make my life more enjoyable.
- I have nothing around the house or in storage that I do not need.
- My plants and animals are healthy (Fed, watered, getting light, etc.)
- I drink clean, healthy water. I recycle and am "Green" conscious.
- I contribute to protecting the environment (conserve energy, recycle etc.)
- My bed/bedroom lets me have the best sleep possible (Firm bed, light, air.)
- My clothes are all pressed, clean and make me look great.
- My home is neat and clean (Vacuumed, closets clean, desks and tables clear; windows clean.)
- My car is in excellent condition (Doesn't need mechanical work, repairs, cleaning or replacing.)
- My appliances, machinery and equipment work well.
- My home support structures are in good working order (Heating, plumbing, air conditioning.)
- My personal files, papers and receipts are scanned or neatly filed away.
- My office is clean and organized (Desk, file cabinets, bookshelves.)
- My work environment is productive and inspiring.
- My computer is 100% effective (enough memory, speed, etc.) and the software supports my life and work.
- My computers and files system are backed up in case of emergency.
- I effectively use the web, computer, internet and do not waste time with email and searches.
- I consistently have adequate time, space and freedom in my life.

____ Number of boxes checked (25 max)

B. WELL-BEING

- I take care of me every day.
- I am conscious of my use of caffeine and I am within healthy limits for me.
- I am conscious of my use of sugar and I am within healthy limits for me.
- I am conscious of my television viewing habits, and I am within healthy limits for me.
- I am conscious of my use of alcohol and I am within healthy limits for me.
- I am conscious of my use of tobacco and I am within healthy limits for me.
- My weight is within my ideal range.
- I have no habits which I find to be unacceptable.
- My teeth and gums are healthy (I floss daily, brush regularly, have seen dentist regularly.)
- My cholesterol count & blood pressure is healthful.
- I have had a complete physical exam, hearing exam, and eye exam in the past 3 years.
- I walk or exercise at least three times per week.
- I feel I am free of any illness, viruses or physical challenges.
- I do not use illegal drugs or misuse prescribed medications.
- My nails, skin, and hair are healthy and look good.
- I don't rush or use adrenaline to get the job done.
- I am aware of any physical or emotional challenges or conditions I have, and I am attending to them.
- I consistently take evenings, weekends and holidays off and I take at least two weeks of vacation each year.
- I rarely miss work due to illness.
- My life and work are in balance.
- I have a resource to generate peacefulness. (Spirituality, religion, meditation, etc.)
- I have something to look forward to virtually every day.
- I have a rewarding life beyond my work or profession.
- I celebrate when good things happen in my life or my work.
- I have fun on a regular basis.

____ Number of boxes checked (25 max)

C. MONEY

- I like my work.
- I do not worry about money.
- My income source/revenue base is stable and predictable.
- My earnings are commensurate with the effort I put into my job.
- I am on a planned career path. I am satisfied with my progress and am taking steps to stay on my plan.
- I know how much I must have to be financially independent and I have a plan to get there.
- I currently live well, within my means.
- My earnings outpace inflation, consistently.
- I currently save at least 10% of my income.
- I pay my bills on time, virtually always.
- I have minimum balances on my credit cards.
- I have written agreements and am current with payments to individuals or companies to whom I owe money.
- I have 6 months' living expenses in an interest-bearing savings account.
- I have a financial plan for the next 1, 3, 5 years.
- I know my net worth (My assets minus liabilities.)
- I have a budget that allows me to save money for my future.
- My investments are diversified, managed, and do not keep me awake at night.
- I subscribe to publications or visit websites, read resources relevant to my work.
- I have good relationships with people who can assist in my career, professional development.
- I have excellent medical insurance which covers prevention and emergencies.
- My will is up-to-date and accurate.
- I own appropriate levels of life insurance, long term care, home care insurance, and disability coverage.
- My assets (car, home, possessions, and treasures) are well insured.
- I have no current, impending legal or tax infringements.
- I have safeguards in place to protect my assets and my identity (computer.)

____ Number of boxes checked (25 max)

D. RELATIONSHIPS

- I put people first and results second.
- I have a best friend or a group of close friends whom I have mutual trust and respect.
- I am a person of my word. People can count on me.
- I communicate with friends or peers on how they can assist me in meeting my needs or goals.
- I get along well with my manager, staff, and coworkers.
- I have a coach to work on my life, business or career.
- I have an individual in my life that inspires me (Teacher, hero, leader, guru, friend.)
- I intentionally maintain a personal and professional network to move my life and business forward.
- I am consistently early or easily on time.
- There is no one who I would dread or feel uncomfortable "running across" (In the street, at an airport or party.)
- I have let go of the relationships which drag me down or damage me.
- I have communicated, or attempted to communicate with everyone who I upset, even if it wasn't fully my fault.
- I am able to freely tell people my expectations of our relationship.
- I am fully caught up with letters and calls.
- I always tell the truth, no matter what.
- I have enough love and respect from people around me to feel good.
- I have fully come to terms with those people who have hurt/damaged me, intentional or not.
- I quickly correct miscommunications and misunderstandings when they do occur.
- I live life on my terms, not by the rules or preferences of others.
- I am complete with all past significant relationships.
- I am in tune with my wants and needs and get them taken care of.
- I do not judge or criticize others.
- I do not "take personally" the things that people say to me.
- I have a circle of friends/family that love and appreciate me for who I am more than just what I do for them.
- I consistently tell my parents, children, and siblings that I love them.

____ Number of boxes checked (25 max)

____ TOTAL SCORE (ALL 4 SECTIONS,/ 100 MAX)

What Am I Tolerating?

We humans sure have learned how to tolerate a lot! We put up with, accept, take on and are dragged down by people's behavior, situations, unmet needs, crossed boundaries, unfinished business, frustrations, problems and even our own behavior. You are tolerating more than you think. So, what are you tolerating? Please take a couple of minutes to write down stuff you sense that you are tolerating. As you think of more items, add them to your list. Do you have to do anything about them? No, not really. Just becoming aware of and articulating them will bring them to the forefront of your soul and you'll naturally start handling, eliminating, fixing, growing through and resolving these tolerations. **(Enjoy this, okay?)**

1. Home & Office.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

2. Relationships & Family.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

3. Car, Appliances & Equipment.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

4. Work & Clients/Customers.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

5. Personal Finances & Income Level.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

6. Personal Integrity & Self-Care.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

7. Lifestyle & Desires.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

8. Body & Appearance.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

9. Children & Parents (Your caring of /for)

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

10. Problems & Stress.

__ 1 _____
__ 2 _____
__ 3 _____
__ 4 _____
__ 5 _____

What You Can Expect of Me During Our Coaching Relationship

Confidentiality

All of our interactions will remain strictly confidential, meaning I will not share any information provided by you with anyone, without your express consent.

Availability

You may contact me outside of our scheduled sessions, if you prefer not to wait until our next formal meeting. You are encouraged to stay in touch with me via email, as this provides an easily accessible way for me to monitor your progress, and to add extra insights during our time together. I generally do not coach during the last week of the month – please respect this time.

Communications

I usually coach from the top of the hour to 50 minutes after. The most accessible time to reach me is in that 15-minute time period before the upcoming hour. Otherwise, I will always reply to your requests within 48 hours, except when out of town, on holiday, or during the last week of the month.

Commitments and Integrity

If I make a promise to you, it will be kept.

If I am unable to keep a commitment, I will notify you of this as soon as possible.

I will deal with you in the highest standard of integrity, honesty, professionalism, and respect.

I am adamant about delivering high value to my clients.

I will let you know if I feel my involvement is not likely to make a positive difference in your life.

Non-Judgmental Attitude

I am not here to judge right or wrong. My position is to coach the “real you” in the life you want. As there are times when you will share information that may make you vulnerable, I assure you that I will treat your choices and actions (past, present, and future) with respect.

Tenacity About Your Progress

As you have hired me to grow, I know that some of the best value I can deliver to you comes through the “tough places” you may be unwilling to visit on your own. I will give honest feedback, ask challenging questions, give assignments designed to challenge your comfort, make you accountable to your commitments, and every once in a while, give you a gentle, always caring kick in the behind.

In coaching, you can expect information, advice, support, collaboration, strategies, continuous presence, energy, creativity, availability, and partnership.

What You May Expect Before Our First Session

The coaching experience “begins the moment you make a commitment to your first session. Many clients report one or more of the following experiences prior to this session:

- Curiosity
- Doubt
- Excitement
- Unexpected negative feelings about the process
- Unexpected positive feelings about the process
- Uncertainty about this whole coaching idea

All of these symptoms are normal and expected AND is a sign that you are ready to make major positive shifts.

What You Can Expect of Yourself and the Coaching Experience

Just as if you were to read an exciting book, it is sometimes best not to know what exactly is ahead of you.

It is up to you to let me know of the results that you want our sessions to accomplish for you.

It is up to me to plan steps to take you to those results.

It is up to us together to make sure the steps are taken, and all necessary adjustments are made as we go along.

Our sessions are used to debrief on past assignments, ask and answer questions, strategize, and set up next steps.

In my experience, almost every client will go through some periods of feeling completely invincible and other periods of feeling fearful, doubtful, tired, or resentful of the whole process. I personally get excited to see ALL of these times because they all form part of the growth cycle.

To you, some time periods may feel great, other times you would do without.

Overall, however, the growth curve WILL BE POSITIVE.

Many clients report some or all of the following:

- Increased earnings,
- Better use of time
- Better physical shape
- Better relationships
- More sales and/or more customers
- Better Health
- More free time

And always – an overall huge increase in their sense of control and peace of mind!