

Carrie Davidson

Stable Foundation Life Coaching

Date _____

Hi _____,

It will be an honor to walk faithfully beside you as your Christian Coach. Coaching relationships are goal-directed and action-oriented life-changing experiences that supports your journey of self-discovery and personal growth. Go from insight to action!

We will customize our coaching relationship to meet your needs as well as you're working and learning styles. You will set the agenda and the direction of our coaching sessions and while I manage the coaching process.

My role is to provide you with the support you need to: *articulate* your dreams and desires, *clarify* your values and purpose, *establish* your visions and goals, *set* realistic boundaries and *achieve* those outcomes through accountability as you discover and follow God's plan for your life.

As your coach, I will give you my full attention while asking challenging questions to deepen Your learning. I will encourage you to explore your options and sometimes with your permission, I make requests. You always have the option to accept, modify or decline those requests.

I will be a reflective listener, hearing not only your words but your heart. I will encourage your strengths while being honest, direct, and objective about the things that hold you back.

It is evident that you are highly motivated to grow and make changes in your life. Succeeding in this process requires a commitment of your time, energy and financial resources. You will complete most of your work between our scheduled coaching sessions.

Let's get started!

Please thoughtfully and prayerfully complete and return this Welcome Packet. It will be of great benefit for both of us.

Feel free to contact me with any questions.

With anticipation,

Carrie Davidson, PCC Professional Life Coach & Equine Professional who uses horses for deeper understanding!

["In all your ways acknowledge Him and He shall direct your paths." ~ Proverbs 3:6](#)

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Getting Started

This Welcome Packet includes six documents. Please complete and return each one.

1. Client Information

All client information is confidential and treated appropriately. I will keep a confidential record of your name, phone number and email address in order to meet the requirements for coach credentialing by the International Coach Federation (www.coachfederation.org).

2. Coaching Relationship

This quick survey gives me an idea of where you are and where you want to go through our coaching relationship.

3. Getting to Know You

In addition to the information that you provide through this exercise, I would love to have a picture of you or one of you and your family for your file.

I am very visual and photographs are a wonderful tool as I pray for you.

Also, please feel free to send me anything else that you think might help me get to know you better.

4. Life Satisfaction Survey

This survey captures how satisfied you are with different parts of your life at the current time.

5. Coaching and Payment Agreement

Review these guidelines and procedures before signing and returning this agreement. A clear understanding of these will help our professional coaching relationship be productive and enjoyable.

Please keep a copy of this form for your personal records.

6. Coaching Prep Form

You will complete and email this form to me stablefoundationministry@gmail.com. Please submit your completed Coaching Prep Form at least one day in advance of your session to give me enough time to prepare for our time together.

Please email this Welcome Packetss to:
coachingthruquine@gmail.com before our
first coaching call.
Phone (763)242-8678
1234 115th Ave., Princeton, Minnesota 55371

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Client Information

Full name: _____

Name you like to be called:

Address:

Email:

Home phone: _____ Work phone: _____

Cell phone: _____

Date of birth: _____ Marital status: _____

Spouse's name: _____ Anniversary date:

Names and ages of children:

Education:

Employer: _____ Occupation:

Briefly describe your occupational responsibilities:

Employment history and work experience:

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Coaching Relationship

Have you previously hired a life coach? Yes / No

How did you hear about Stable Foundation Life Coaching?

What motivated you to hire a life coach?

In what areas can I best coach you?

(Examples: encouragement, brainstorming, accountability, challenging, clarifying, new perspectives, processing, discovery, strategy, etc.)

Have you done any work to define your core values? If so, what are they?

Do you have a personal vision, purpose or mission statement? If so, what are they?

What do you hope to accomplish through our time together?

On a scale of 1 – 10, how willing are you to make changes in your life to do things differently?

not very 1-----2-----3-----4-----5-----6-----7-----8-----9-----10---extremely

Please explain your score.

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Getting to Know You

Describe a great day.

Share your personal interests and hobbies.

List things that you like to do. List things that you don't like to do.

List specific areas where you are most responsible.

List specific areas where you are most irresponsible.

What motivates you?

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What negative attitudes, self-talk or beliefs block your progress?

Describe the things that are missing from your life.

Describe the things that would make your life more fulfilling.

List three things that you like most about your life right now.

List three things that you like least about your life right now.

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If you could go back and do three things differently, what would they be?

Describe the things that you procrastinate over and continue to put off?

How do you resolve conflict with those closest to you?

Are you now, or have you ever been, in therapy? Yes / No

For what issues?

What is/was the result?

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Describe your spirituality.

Describe your relationship with God?

In what ways do you sense God challenging you or trying to get your attention?

If you have favorite scripture verses, please list the citations (chapter/verse/references).

If you had an extra 15 minutes in your day, how would you spend them?

What else would you want me to know about you so that I can be the most effective?

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Life Satisfaction Survey

Often referred to as the Life Wheel, this survey captures how satisfied you are with different areas of your life.

Highlight a number (from 1 – 10) in each life area.

1 = completely dissatisfied

(This part of my life is entirely unacceptable to me in its current state.)

10 = completely satisfied

(I couldn't be happier or more satisfied with this area of life.)

Although your overall satisfaction likely changes from day to day, try to give an overall assessment of where you are at present. Skip any items that don't apply to you.

Physical Health 1----2----3----4----5----6----7----8----9----10

Mental / Emotional Health 1----2----3----4----5----6----7----8----9----10

Career / Employment Satisfaction 1----2----3----4----5----6----7----8----9----10

Financial Stability 1----2----3----4----5----6----7----8----9----10

Marriage / Romantic Relationship 1----2----3----4----5----6----7----8----9----10

Home Life (Immediate Family) 1----2----3----4----5----6----7----8----9----10

Extended Family / In-Laws 1----2----3----4----5----6----7----8----9----10

Friends / Social Life 1----2----3----4----5----6----7----8----9----10

Recreation / Relaxation 1----2----3----4----5----6----7----8----9----10

Lifestyle (Degree of Busyness) 1----2----3----4----5----6----7----8----9----10

Personal Life Fulfillment 1----2----3----4----5----6----7----8----9----10

Personal Spiritual Life 1----2----3----4----5----6----7----8----9----10

Church / Religious Life 1----2----3----4----5----6----7----8----9----10

Physical Comfort (Housing, Car, etc.) 1----2----3----4----5----6----7----8----9----10

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Coaching and Payment Agreement

Guidelines

1. I understand that life coaching is a relationship between a coach and an individual or couple desiring coaching. The relationship is designed to facilitate the creation and development of personal, professional or business goals and to develop and carry out a strategic plan to achieve those goals.
2. I understand that life coaching is a comprehensive process that may involve all areas of my life. It is designed to address issues that I, the client, would like to consider. These areas could include but are not limited to; relationship enhancement, lifestyle management, life/work balance, health, decision making, career development, spiritual growth, and recreation.
3. I understand that life coaching can involve several methods including: brainstorming, values clarification, and written assignments, goal-setting, identifying plans of action, accountability, making requests, agreements to change behavior, examining lifestyles and questioning.
4. I understand that life coaching is an ongoing relationship that may take a number of months to complete.
5. I understand that either party (client or coach) can choose to discontinue coaching at any time.
6. I understand that my coach has made no guarantees to me as to the expected outcome of my coaching.
7. I understand that life coaching is for people who are basically well-adjusted, emotionally healthy and functioning effectively but who desire to make changes in their lives.
8. I acknowledge and agree that I am fully responsible for my wellbeing and the choices and decisions I make during my coaching sessions.
9. I understand that life coaching is not therapy, counseling, advice-giving, mental health care or treatment for substance abuse. My coach is not functioning as a licensed mental health professional, and coaching is not intended as a replacement for counseling, psychiatric interventions, treatment for mental illness, and recovery from past abuse, professional medical advice, financial assistance, legal counsel or other professional services.

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10. I acknowledge and agree that coaching is not psychotherapy, and that Carrie Davidson is Not a licensed therapist. I understand that professional mental health referrals may be given if it appears they are needed.

11. I understand that life coaching is most effective when all parties are honest and straightforward in their communication.

12. I understand that my coaching sessions and resulting information are strictly confidential except in those situations where such confidentiality violates the law.

13. I agree to allow my coach to submit a confidential record of my name, phone number and email address to the International Coach Federation (www.coachfederation.org) in order to meet the requirements for coach credentialing. I understand that the ICF will only utilize this information to verify my coach's professional requirements and that following the credentialing process where two assessors will validate the list and then destroy the two copies the ICF will only maintain this information in its secure files.

14. I understand that each person (client and coach) in the coaching relationship is guided by his or her values and beliefs. I know that my coach is a committed follower of Jesus Christ and seeks to live in accordance with this commitment. I know that my coach will be forthright in making this known, but will respect my freedom to make my own choices.

Procedures

15. I understand that some or all of my coaching may be done in person, in the pasture, via phone call or on Zoom. I will make scheduled sessions time. My coach can be reached at her home office cellphone at (763) 242-8678. Each session will be approximately 50 minutes in length.

16. I understand that rescheduling and cancellations need to be made at least 24 hours in advance. Rescheduling for a valid emergency will be allowed otherwise, missed sessions are not made up or refunded.

17. I agree to the Payment Protocol.

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Commitment:

My coaching sessions will begin on _____

I have read and agree to the conditions included in the Coaching and Payment Agreement. By entering into this agreement, I agree to hold the coach harmless from all liability.

Client Name _____

Client Signature _____ Date _____

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Prep Form

“The plans of the diligent surely lead to advantage.” Proverbs 21:5

Please answer using different colored ink.

Name:

Date/Time:

WINS ... progress since last call:

A) NEXT STEPS FORWARD

B) Additional celebrations, insights, breakthroughs, new choices or decisions

AREAS OF RESISTANCE ... I didn't complete and want accountability for:

CURRENT CHALLENGES:

FUTURE OPPORTUNITIES ... that make my heart sing!

FOCUS: Today I want to ... explore, discover, gain awareness, renew my perspective, make a distinction, make an effective choice, share my dreams, clarify my direction, face a challenge, change a habit, take a risk, develop an action plan, or vent.

I am thankful for:

I need prayer for:

NEXT STEPS FORWARD ... to be determined during this coaching call

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