



## ***Welcome Packet***

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August 14, 2024

Dear Client,

Welcome and thank you for the opportunity to work with you! I am very excited to have you as a new client. I look forward to coaching you to gain clarity on and choose the best next career path for you.

On a business note, I would like you to be familiar with my policies and procedures. This document contains everything you will need to begin our coaching engagement. I need to have the following forms filled and returned to me via e-mail prior to our first session:

- Sign and date the Client Agreement and Terms of Service.
- Fill out the Primary Questionnaire.

The information in the Primary Questionnaire will assist me in getting to know more about you and what you would like to accomplish. Many clients share that answering these questions is quite valuable and increases their motivation to begin the coaching engagement.

I have included an exercise called the Whole Life Model. Review and rate the life segments in the model as best as you can. We will discuss it in detail during our upcoming sessions.

The last page of the document (Pre-session Call Prep Form) is a form you will use continually between our coaching sessions. ***Please save a blank version of it on your computer.*** After our first session, I will ask that you use this form to evaluate your weekly progress and email it back to me 24 hours prior to each subsequent session. This will help you and me to maximize our time together.

I look forward to working with you!

With gratitude,

*Meaghan Janedis*

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## *Client Agreement and Terms of Service*

**Coaching Sessions:** Our sessions will be conducted either via phone or in person and will last approximately 60 minutes each.

**Timeliness:** It is important for us to keep our appointments timely - for your benefit as well as the benefit of my other clients. 24-hour notice is requested to cancel an appointment.

**Fieldwork:** A critical piece of the coaching process is the fieldwork you conduct (i.e. assignments, research, exercises, etc.) between our sessions. This fieldwork must be one of your top priorities in order for you to derive the most benefits that coaching offers.

**Availability of On-Call-Coaching:** E-mail and short phone calls are included in this coaching engagement. You may e-mail me at any time or call during business hours to ask questions, share wins, ask for support or for any other reason. I will respond to unscheduled communication within 24 hours.

**Payment:** The fee for each single session is \$250. A payment made through eaglepointcoaching.co with credit/debit card, Zelle or Venmo should be made prior to each session.

**Termination:** Should either you or I determine that insufficient progress or cooperation exists or if you determine that you have reached your desired goal, either party may cancel this Agreement without recourse other than full payment for the sessions used to date.

**Confidentiality:** I recognize that certain confidential information may be relayed during our coaching engagement. I will not, at any time either directly or indirectly use this information for my benefit nor disclose said information to anyone else without your specific permission - excluding disclosure of illegal or unethical activities.

**Other:** You have been made aware that this coaching relationship is in no way to be considered or construed as psychological counseling or any type of therapy. You have agreed that you are responsible for your results from the engagement.

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Client Signature

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Date

Please sign and e-mail back.

## *Primary Questionnaire*

1. What led you to seek out hiring a coach?
2. What are 2-3 tangible goals you would like to achieve by the end of our engagement?
3. What words describe you at your best?
4. In your personal and professional life, what encourages or motivates you to succeed?
5. What are your greatest accomplishments - what are you most proud of?
6. What is the compliment or acknowledgement you hear most often about yourself?
7. What are your favorite pastimes (name at least 5)?
8. What are some weaknesses you would like to improve upon?
9. What has stopped you in the past from accomplishing desired goals?
10. Are you aware of any behaviors/beliefs that stand in the way of you achieving professional success?
11. What has been your biggest disappointment?
12. What are your biggest fears?
13. If you trusted me enough as your coach to tell me how to manage you most effectively, what tips would you give me?
14. Is there anything else you would like me to know about you?
15. How will you know that our coaching has been effective?

## *How to Get the Most Out of Your Coaching Engagement*

I want you to get the most from the time we have together each week and from the time in-between our sessions. This brief guide describes what most of my clients do to get full value from their coaching with me.

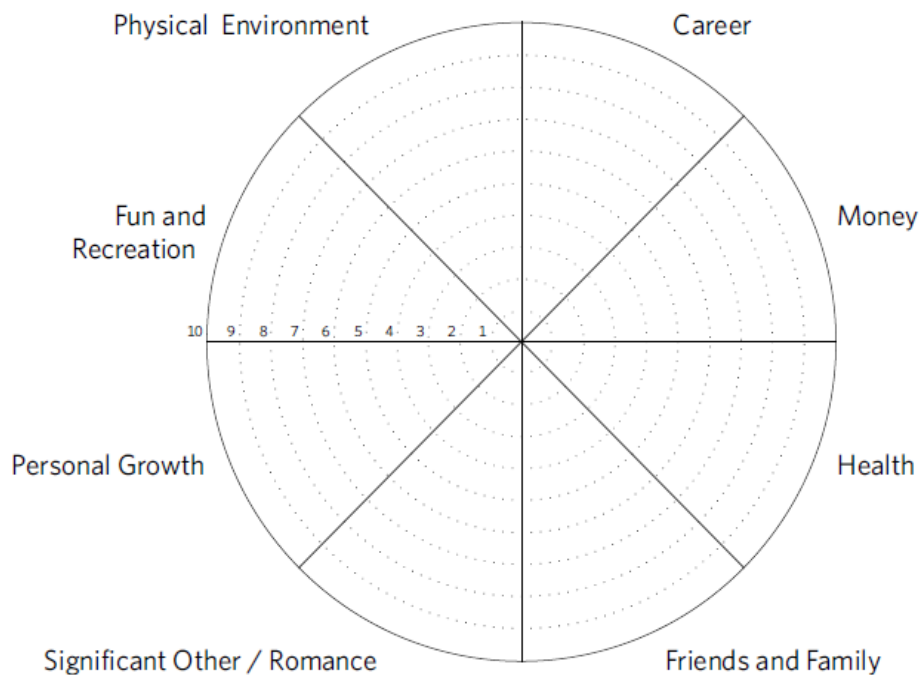
- Keep your own coaching notes or even a journal.
- Coaching requires resources (both time and financial) to be successful. Make sure you are well equipped to devote necessary resources to enable you to focus and carry out your coaching assignments in between sessions.
- Trust your coach to be a fair and unbiased resource with no agenda.
- Be honest with yourself and your coach.
- Come into coaching sessions well prepared (completed tasks, prep-form, agenda, etc.).
- While in session, make sure you have no outside distractions (smart phone, e-mail, laptop, etc.).

## Whole Life Model

This wheel contains eight sections that, together, represent one way of describing a whole life. The exercise measures your level of satisfaction in these areas today. It is not a picture of how it has been in the past or what you want it to be in the future. It is a snapshot taken in this moment. It is not a report card on how well you have performed. Please rate each area on a scale of 1 to 10.

- “1” means the area does not work the way you envision it (you might feel frustrated or stuck).
- “5” would indicate that things in this area are working, but you are looking to take it to the next level (you might feel content, but not overjoyed).
- “10” would indicate this area brings you a feeling of success and confidence. When you think about it you are happy (you might feel peace, excitement, and accomplishment all at the same time).
- Some areas will be in between. Rate them accordingly.
- If there is an area you do NOT see here that applies to your life, please add it.
- Ignore areas that do not apply to you.

### Wheel of Life Exercise



## *Pre-session Prep Form*

**Instructions:** Please complete this form for each coaching session and return via e-mail at least 24 hours before each session.

1. What have you accomplished since our last coaching call? (What are your wins?)
2. Did you face any obstacles and how did you overcome them?
3. What didn't you get done, but intended to do?
4. What challenges and problems are you facing now?
5. What opportunities are available to you right now?
6. Did you gain any insights and/or new awareness which excites you?
7. Anything else?
8. What would you like to use the upcoming coaching session for?