



## **Welcome**

Welcome to the magic of coaching! I am looking forward to working with you. The information that follows is designed to answer some frequently asked questions and provide a better understanding of the coaching process. If at any time this information is not clear feel free to email me at [jnovick@careersolution.biz](mailto:jnovick@careersolution.biz)

## **What you can you expect from the coaching process?**

During the coaching process, my complete attention and focus will be on you! The coaching process is designed to help you achieve your personal and professional goals with support and guidance. I will provide a forum for you to establish your goals. I will ask powerful and probing questions, offer different perspectives, while helping you pave the way to achieving what you want most in business and in life.

Everything that we discuss will be confidential. I will always be in your corner with your best interests and your agenda at heart.

## **What will I expect from you?**

Make your coaching sessions a priority in your life. We are a team, accomplishing more together than either of us could do alone.

For this to happen, you need to be prepared for every session. Our coaching sessions are designed to get you from where you are today to where you want to be. Feedback is encouraged. Let me know how the process is working for you.

Lastly, have fun with this process and make sure to listen to your heart as well as your head. Pay attention to your intuition and to what your "gut" is telling you. These responses occur for a reason.

## **Extra Time**

Between sessions, if you need to ask questions, tell your story, or bounce some ideas around, please email me at [jnovick@careersolution.biz](mailto:jnovick@careersolution.biz) or call me at 714-928-NEXT. This extra time together is part of the service and there is no extra charge.



## **Communication**

Please share with me your stories, your wins, disappointments, anything you like, as well as your thoughts about your coaching experience. I want to know what works as well as what does not.

Please note all of the details of our client – coach agreement. The purpose of this agreement is to assure that we are both clear about what we expect from our coaching relationship. Please let me know if there is anything below that is not clear and we can talk about it.

The real work is yours to do, and I want you to choose the pace that is effective for you. If at any time, you are not comfortable with any part of our coaching partnership, let me know immediately so that we can deal with the situation and move forward. Please note the following important information:

### **What I do as a Coach:**

- Listen to you openly and actively
- Ask powerful questions
- Reflect/mirror back to you
- Offer different perspectives
- Provide structure
- Assist in setting goals, planning and strategizing
- Hold you accountable for what you want to achieve
- Trust you to make your own decisions
- Show up with your best interests at heart
- Tell the truth
- Believe in you and your highest good



**What I do not do as a Coach:**

- Do your work for you
- Judge you
- Give you legal or financial advice
- Take responsibility for you or your actions

**What I ask from you:**

- For each session, create and email your agenda 24 hours prior the session
- Please email this agenda to me at [jnovick@careersolution.biz](mailto:jnovick@careersolution.biz)
- When you email the agenda each week please title the email:  
Agenda for YOUR NAME Session THE DATE / TIME OF SESSION
- Create an agenda for each coaching session that reflects what YOU want to discuss and explore.
- Be completely truthful with me and to yourself
- Be willing to stretch beyond your current comfort zone
- Let me know if something isn't working for you
- Have fun and enjoy the process!
- Cellular phones are discouraged. The coaching session should take place in a quiet environment with no distractions. We would suggest taking coaching calls from a quiet room with a land – line telephone.
- If the phone connection is poor, I may ask you to call back when you have found a quiet location with a land – line connection.

I have read this agreement and will comply with its provisions:

Client Signature \_\_\_\_\_ Date \_\_\_\_\_



## New Client Welcome Packet

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### Table of Contents

1. Client Information
2. Coaching Terms of Agreement
3. Policies & Procedures
4. Life Balance Snapshot
5. Ten Big Questions
6. 6 Goals to Attain in 90 Days
7. Recommended Supplies
  - As you are going through this packet please feel free to email me or call with questions.
  - When answering questions please feel free to use extra sheets of paper, utilizing as much space as you need.
  - Please fax or email the entire contents of this packet back to me 1 week prior to our first session: [jnovick@careersolution.biz](mailto:jnovick@careersolution.biz) or fax them to 949-713-7442.



**Client Information**

1. Client Name:

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2. Address:

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3. Spouse's / Partner's Name(s):

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4. Children's Name(s):

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5. Pet's Name (s):

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6. Phone 1:

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Phone 2:

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7. Fax:

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8. Email Address:

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9. Occupation / Employer:

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## Coaching Terms

This agreement is between The Next Step Career Solutions and \_\_\_\_\_.

The first Coaching session will take place on \_\_\_\_\_.

- The fee for each meeting is \$\_\_\_\_\_
- Or
- The fee for \_\_\_\_\_ months is \$\_\_\_\_\_ per month, payable in advance each month.
- After three months, this agreement converts to a month-to-month payment schedule.
- A 5% discount will be given when booking 4 or more session at a time.
- The client and coach both agree to provide a fourteen-day notice prior to canceling further services.
- Session times and dates will be determined during our introductory session.

May I mention to others that I am working with you as your coach? \_\_\_yes \_\_\_no

May we send session related information to this email address? \_\_\_yes \_\_\_no



## Policies and Procedures

- Call 949-713-7442 at the agreed upon time to begin our sessions.
- Please call on time.
- If the line is busy or there is no answer please call back one minute later until we connect.
- Please do not leave a message and wait for me to call you back.
- Cancellations must be made no later than 48 hours prior to a scheduled session.
- Failure to cancel 48 hours prior to a session will result in a cancellation fee to be determined by the Coach.
- Fees are collected one week prior to each single session or at the beginning of the month for multiple sessions.
- Please visit [www.careersolution.biz](http://www.careersolution.biz) for secure credit card payments.
- Session Duration: approx. 45-60 minutes.

The coach promises the client that all information provided to the coach will be kept strictly confidential.

I understand that Jamie L. Novick is not a licensed therapist and that I am responsible for all my decisions, actions and feelings.

Our signatures on this agreement indicate your full understanding of the agreement and willingness to comply with the conditions outlined above.

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Client Signature/ Date

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Jamie L. Novick Signature/Date



## Life Balance Snapshot

Take a few minutes to rank the following nine areas of your life with regard to your level of satisfaction (rank from 0 to 10).

Not satisfied at all = 0

Totally satisfied = 10

\_\_\_ Career

\_\_\_ Finances

\_\_\_ Health

\_\_\_ Friends and Family

\_\_\_ Significant other/Romance

\_\_\_ Personal growth

\_\_\_ Fun & Recreation

\_\_\_ Spirituality

\_\_\_ Physical Environment (your home, the city/town in which you live, neighborhood, climate, the part of the country in which you live)

- What is working best in your personal life right now?
- What is working best in your professional life right now?
- What are the most challenging aspects of your life right now?
- What one aspect would you like to change most?
- What motivates you?
- How do you deal with making mistakes?
- What typically holds you back from going after what you want?
- What do you want to accomplish by having a coach?
- What will you do to ensure your success?



## Ten Big Questions

- The purpose of these questions is to establish a launching point for your coaching sessions.
  - Please take time to answer these questions.
  - These answers may change and that is ok.
1. How would you describe yourself as a friend, worker, and partner? Do you want to change any of these descriptions?
  2. When in your life did you feel most creative?
  3. What is your dream job? Do you have it? If you do or don't, what does it look like?
  4. Why did you come to a Career & Life coach?
  5. What are your expectations for yourself?
  6. What traits, experience, and talents do you bring to each job? What are you best at? What do you need put more focus on?
  7. What does your perfect work and home life look like?
  8. Describe the most important accomplishment in your professional life. What did you do? How did you do it? Do the same for your personal life.
  9. What scares you in the workplace? At Home?
  10. Do you feel that you have a balanced life? If not why? If so, why?



## 6 Goals to Attain in 90 Days

- Begin by asking yourself what goals or projects would you like to complete in the next 90 days?
- Please fill out your 6 Goals to reach in the next 90 day's of working together.
- Three of them are personal goals and three are professional goals.
- If you're coaching sessions are geared more toward personal than professional growth or change, feel free to list your goals accordingly.
- The objective is to have 6 goals of your choice that will help you move forward with your life.
- These goals can and will be discussed and explored during our first coaching session together.
- For each goal please write detailed action steps of how you are going to reach this goal.
- It is ok to put a goal down without an action step when you begin this process.
- These goals and steps are a working tool that will be revised many times.
- Goals should be challenging and reflect your big-picture objectives.



1. Goal:

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Action Steps:

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2. Goal:

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Action Steps:

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3. Goal:

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Action Steps:

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4. Goal:

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Action Steps:

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5. Goal:

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Action Steps:

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6. Goal:

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Action Steps:

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## **Recommended Supplies**

We recommend the following supplies for our first coaching session. These supplies will help you maximize your coaching experience and set the foundation for an organized and helpful coaching experience.

### **1) Three Ring Binder**

This binder will serve as a reference tool for you during and after the coaching experience.

### **2) Four Tabs for Three Ring Binder**

**Tab 1 –Welcome packet information to include completed:**

Client Information  
Coaching Teams  
Policies and Procedures

**Tab 2 – Questionnaire forms**

Life Balance Snapshot  
Ten Big Questions

**Tab 3- Session Notes**

Session Notes

**Tab 4- Goals**

Six Goals to attain in 90 day's worksheet  
Plenty of blank pages



## Recommended Supplies (Continued)

### 3) A Journal

As you go through the coaching process your journal will become a tool for you to use daily. It is a place where you can track how you are feeling and how things are changing. We will go over this tool in more detail during our first session.

### 4) A Pre-determined quiet location with a land-line telephone connection

The coaching session is your time. Please make an effort to take care of yourself and respect your coaching time by finding a quiet location that you can use for up to an hour. This location should have a land-line telephone. Some suggestions: Library conference room, home office.