

# Personal Information Fact Sheet

(All personal information is confidential and is treated appropriately.)

## Client Information

Full Name \_\_\_\_\_

Name you like to be called \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

Street Address \_\_\_\_\_

## Telephone Numbers

Home Telephone \_\_\_\_\_ Work Number \_\_\_\_\_

Message or Car Telephone \_\_\_\_\_

Pager or Other Telephone \_\_\_\_\_ Fax Number \_\_\_\_\_

E-Mail Address \_\_\_\_\_ Work E-Mail \_\_\_\_\_

## Employment Information

Occupation (what you do to earn a living) \_\_\_\_\_

\_\_\_\_\_

Employer Name \_\_\_\_\_

Employer Address \_\_\_\_\_

## Personal Information

Date of Birth \_\_\_\_\_ Sex \_\_\_\_\_ Marital Status \_\_\_\_\_

Significant Other's (S O's) Name \_\_\_\_\_

S O's Date of Birth \_\_\_\_\_ Number of Children \_\_\_\_\_

Name(s) of Child(ren) and age(s) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Coaching Call Instructions

The client calls the coach on the coaching call number noted below at the dates and time noted below.

### Voice Mail

If there is no answer when you call for your coaching call, you will be switched over to my voice mail. Do not leave a message at this time. Please hang up and call back in a minute or two.

If you are switched over to my voice mail the second time, be sure to leave a message with a telephone number I can reach you at immediately.

### Late Call

You will be responsible for leading the coaching call. This means that you must come prepared to the call knowing what you want to be coached on. You can write down ideas or things that come up during the week in your coaching notebook to help you remember them during our calls.

There will be homework given during our calls and you may want to take notes during our calls. So bring your notebook to the calls with you so you can write things down.

Our next three appointments are:

\_\_\_\_\_ At \_\_\_\_\_

\_\_\_\_\_ At \_\_\_\_\_

\_\_\_\_\_ At \_\_\_\_\_

## Designing the Coaching Relationship

One of the objectives of the coaching relationship that we are forming is to empower the client. It is essential that the client realize that they are primarily responsible for the results that are soon to be produced out of the coaching relationship. One way to be very clear about this is to treat our relationship as a separate entity. I will use a vegetable garden analogy to illustrate.

The coach and the client agree to grow a vegetable garden. The coach agrees to point out the perceived weeds and the client agrees to pull out the ones he/she chooses and leave the rest. The client agrees to bring the seeds to grow the vegetables and the coach agrees to guide the client in the appropriate care and watering of the seeds so they can grow. The coaching relationship is like a vegetable garden in that both the client and the coach are responsible for making sure that the coaching relationship (garden) produces the desired results (a healthy, abundant vegetable harvest).

It is essential that we both bring the qualities required to produce the desired results. For example, if we want to grow carrots the client would bring carrot seeds to the garden, not corn seeds. Likewise, if you desire to expand your business we must discuss and examine business-related issues and not speak solely about your health or recreation issues.

Also if you want to grow healthy crops we must both bring fertilizer and nutrients for the soil. The fertilizer and nutrients in the coaching relationship are:

Truth, Honesty and Accountability.

RATE YOUR WILLINGNESS TO BE COMPLETELY HONEST, WITH FULL DISCLOSURE IN OUR COACHING RELATIONSHIP. (0 = not at all, 10 = fully) \_\_\_\_\_

WHY HIRE A COACH? (In general)

\_\_\_\_\_

WHAT DO YOU WANT TO MAKE SURE YOU GET FROM THE COACHING RELATIONSHIP? (Include specifics; i.e. someone who really listens to me; more \$)

\_\_\_\_\_

HOW DO YOU WANT ME TO BE AS YOUR COACH? (Form of acknowledging)

\_\_\_\_\_

WHAT COULD GO WRONG?

\_\_\_\_\_

## Creative Habits

Small constructive actions done on a routine basis lay the foundation for permanent change in our life. They can also quickly give you a sense of accomplishment and forward momentum.

- So ask yourself - What creative habit, done on a regular basis,
- do you do now to keep yourself centered and balanced?
  - enables you to more effectively honor your highest values?
  - demonstrates and furthers the commitments you just listed?
  - moves you further towards living true to your Future Self?

Write on the lines below the 10 creative habits you would like to activate over the next month to move yourself forward. These creative habits can be related to your professional or personal life. Some examples are: process all incoming mail daily or exercise 4 times per week or meditate at least 20 minutes each day. (BE CAREFUL!! Avoid shoulds, "ought tos" and what other people want you to do!)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

## Values Clarification

We live a more fulfilling life or a higher quality of life when what we do and who we are is in alignment with our values. Values are not morals, or behavior we deem as right or wrong. Values are intrinsic to us. According to Webster they are "...that which belongs to the essential nature or constitution of a thing." Values are innate.

Therefore the values clarification process is a discovery process, not a decision making process. Make a mark next to the values that you hold to be true for you now and/or in the future.

Humor	Participation	Directness
Performance	Partnership	Collaboration
Productivity	Community	Service
Personal Power	Contribution	Freedom to choose
Excellence	Connection	Free spirit
Acknowledgment	Focus	Comradeship
Romance	Powerful	Recognition
Spirituality	Harmony	Empowerment
Accomplishment	Self-expression	Orderliness
Integrity	Creativity	Honesty
Truth	Independence	Success
Nurturing	Accuracy	Beauty
Grace	Joy	Adventure
Lack of pretense	Authenticity	Devotion
Zest	Being present	Elegance
Rick taking	Tradition	Peace
To be known	Growth	Vitality
Trust	Intimacy	Leadership
Resilience	Clarity	Certainty
Mastery	Loyalty	Health
Wealth	Model	Meaning
Resolve	Fun	Cooperation
Tranquility	Altruism	Autonomy
Commitment	Completion	Emotional health
Environment	Freedom	Facilitate
Openness	Orderliness	Nature
Privacy	Romance	Security
Sensuality	Love	Personal growth
Relationship	Communicate	Ingenuity
Energy flow	Encourage	Compassion
Awareness	Consciousness	Wisdom
Playfulness	Graciousness	Guide
Adventure	Stimulate	Acceptance

## Being Status

ON A SCALE OF 0 TO 10, RATE THE FOLLOWING; 0=I DON'T EVEN COME CLOSE TO THIS YET, 10=I TOTALLY FEEL THIS WAY

1. It is all right for me to be wrong. \_\_\_\_\_
2. I am not carrying around baggage from my past. \_\_\_\_\_
3. I have no attachments or addictions that limit me. \_\_\_\_\_
4. Money is not a problem in my life. \_\_\_\_\_
5. My relationships support me. \_\_\_\_\_
6. I am easy to support. \_\_\_\_\_
7. I am responsible for where I am in life. \_\_\_\_\_

## Key Values

When you have completed prioritizing your values, write the top 5 values from the values listed on the previous page, on the following lines. Then rate on a scale of 0 to 10 the degree to which you are currently living or honoring each value currently in your life. (0 = Not honoring this value at all, 10 = Fully honoring this value in my life now)

Rating

- \_\_\_\_\_ 1. \_\_\_\_\_
- \_\_\_\_\_ 2. \_\_\_\_\_
- \_\_\_\_\_ 3. \_\_\_\_\_
- \_\_\_\_\_ 4. \_\_\_\_\_
- \_\_\_\_\_ 5. \_\_\_\_\_

What are the primary lies in my life?

We go through our lives telling ourselves lies that hold us back. For example, "I'll never be good enough to do what I want." or "Johnny got all the brains. I'm the slow one." List on the following lines the lies you have been telling yourself.

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# Commitments

Commitments are ongoing quality of life shifts. They speak of the essence of the life that we are creating. There are no specifics; no measurable time or quantity limits as with goals. Therefore there are no limits placed upon your achievements. Commitments have to do with the state or the kind of being you want to create in your life.

For example, "I am committed to enjoying and being creative in my work." and "I am committed to being kind to myself by watching how and what I eat." are examples of commitments in the areas of Profession and Physical Well Being respectively.

Using your core values write out what you are committed to creating in the following areas of your life.

Profession 1. \_\_\_\_\_  
2. \_\_\_\_\_

Finances 1. \_\_\_\_\_  
2. \_\_\_\_\_

Physical 1. \_\_\_\_\_  
Well Being 2. \_\_\_\_\_

Primary 1. \_\_\_\_\_  
Relationship 2. \_\_\_\_\_

Other 1. \_\_\_\_\_  
Relationship 2. \_\_\_\_\_

Personal 1. \_\_\_\_\_  
Development 2. \_\_\_\_\_

Rest & 1. \_\_\_\_\_  
Relaxation 2. \_\_\_\_\_

Physical 1. \_\_\_\_\_  
Surrounding 2. \_\_\_\_\_

## THE KINETIC COACHING PROGRAM

This agreement is signed this date: \_\_\_\_\_

This agreement is for the duration of (day and date): \_\_\_\_\_

thru (day and date): \_\_\_\_\_

4 calls per month in trade or at a rate of \_\_\_\_\_ per month.

1. Kinetic Client: \_\_\_\_\_

2. Kinetic Coach: \_\_\_\_\_

# KINETIC COACHING

## A G R E E M E N T

This agreement, between KINETIC COACHING, David Phears and client, \_\_\_\_\_

Upon completion of \_\_\_\_ months, KINETIC COACHING will convert to a month to month basis. The client and KINETIC COACHING agree to provide one another with a 2 week notice and schedule a "completion" meeting/call in the event it is desired to cancel further services.

Payment in full, at the time of contract, is preferred. However, a monthly payment plan is available. Payment for services is due and payable on the first of the month. Late payments are subject to a late fee. Continuous late payments may be cause for termination of services.

Alteration in the initial time requirements may cause an adjustment in the monthly fee.

The following are the services KINETIC COACHING will provide to you:

- Uninterrupted time scheduled for you on a consistent basis for the length of the contract.
- All conversations are private and in strict confidence. Any notes taken will be provided to you on request. KINETIC COACHING is bound to a code of complete confidentiality.
- After the initial interview and subsequent first phone `huddle', there is no refund. Any service that you find unsatisfactory, however, is open for discussion.
- KINETIC COACHING will direct you in finding the proper assistance for any issues that may arise which may be out of the area of coaching.

To begin our coaching relationship, KINETIC COACHING expects the following from you (please initial where indicated):

\_\_\_\_\_ Be on time for all appointments. If for any reason you must be late notify me immediately.

\_\_\_\_\_ To reschedule your appointment time a 24-hour advance notice is required. If less than a 24-hour notice is given, rescheduling for that week will be provided depending upon feasibility.

\_\_\_\_\_ Be honest. As your coach, it is essential for me to be aware of past and present events, addictions, conditions, medications, and/or beliefs that may influence your life now.

Are you in a 12-step program? \_\_\_\_\_ Are you in therapy? \_\_\_\_\_

Do you have a learning disability? \_\_\_\_\_ Other (explain below):

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Throughout our working relationship, the conversations will continue to be very direct and personal. You can count on me to be honest and straight-forward, asking clarifying questions and making empowering REQUESTS. Do you give me full permission to be bold and forthright in coaching you?  
YES \_\_\_\_\_ NO \_\_\_\_\_

Coaching work is a shared responsibility. The power of the coaching relationship can only be granted by you. As your coach, I hold and reveal the options and possibilities, while you do the work. The purpose of our interaction is to hold your focus on YOUR desired outcome and to coach you to stay clear, focused and in action. If coaching is not working as desired, you agree to communicate that information and take action to return power to the coaching relationship.

\_\_\_\_\_ I agree to keep my fees, with KINETIC COACHING, confidential.

KINETIC COACHING

has my permission to acknowledge me publicly, as a client YES \_\_\_ NO \_\_\_

has my permission to use me as a reference YES \_\_\_ NO \_\_\_

has my permission to quote me and use my name in promotional literature YES \_\_\_ NO \_\_\_

Our signatures on this agreement indicate full compliance with the requests and promises above, and complete understanding of the services to be provided.

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Client Signature

Date

KINETIC COACHING

Date

# The Relationship Circle of Balance

