

Personal Advisory Services

RESPONSIBILITIES AGREEMENT:

This agreement establishes the expectations and boundaries of our relationship. It defines each of our responsibilities to create a successful coaching experience.

My Responsibilities as the Advisor:

- Be present and available for you at our scheduled times.
- Be always constructive and supportive through reflecting, encouraging and challenging you.
- Hold our entire session in confidence. No part of our session will be shared with others without your permission.
- Present the truth as I see it. When you disagree with me, I expect you to tell me so we can discuss it.
- Be available to you between scheduled sessions. You are encouraged to call or email when you have a problem, need advice or want to celebrate a success. You may call or email as often as you like, and I commit to respond within 48 hours.

Your Responsibilities:

- Our sessions will vary in length. We will agree on the time allotment for each session. You agree to be available at our scheduled time. You also agree to be “fully present” for our sessions, undistracted by other activities.
- I ask your commitment to be always honest with me. As presented under **My Responsibilities as the Advisor**, above, what you say is confidential between the two of us and will not be shared with anyone else without your permission. You can say anything to me, positive or negative. This includes being candid in your responses to me, and also telling me if something I do is hindering you in any way.
- If at any time our sessions are not matching your expectations, you agree to let me know.

COMMITMENT PLEDGE:

Working with you in this advisory relationship, my role is to inspire and guide you, and to “hold the space” for you to explore and grow. Your role is to “show up and go full out.”

The primary goal of our relationship is to launch a process of positive, sustained growth. The following commitments, which I encourage you to embrace as part of our work together, provide the foundation for powerful, often immediate shifts in your life. As we launch our work together you may not know “how” you will achieve or live up to these commitments. That’s okay. If your commitment is sincere, the “how” will emerge over time. You will occasionally drift from the commitments. You will learn the tools and receive the encouragement to get back on course.

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1. I commit to live in integrity with myself and my values.
 2. I commit to be open and curious, regarding every interaction and all feedback as learning and growth opportunities.
 3. I commit to take full responsibility for the circumstances of my life, including my physical, emotional, mental, and psycho-spiritual well-being.
 4. I commit to take full responsibility for the level of authenticity of my relationships with others.
 5. I commit to be a responsible steward of my personal and worldly assets (intellect, energy, wealth, possessions).

REFLECTIVE QUESTIONS:

1. What do I (as the advisor) need to know about you that will most help me advise you?
2. What has motivated you in the past to reach difficult goals, make difficult decisions, or perform difficult tasks?
3. Where do you spend time that doesn't satisfy or benefit you?
4. In what areas of your life are you most irresponsible?
5. What blocks you or inhibits you from making substantial changes in your life?
6. How will you know our coaching sessions are effective for you?
7. How might you sabotage our professional relationship?
8. Besides me, how, where and from whom do you experience support?

SESSION CONTENT:

In our coaching relationship you will be presented with options from which we will derive the agenda for our sessions. My role is to guide you as you work toward your goals. Typically, we will focus on a blend of Executive and Leadership Growth Areas and Whole Life Growth Areas.

As we begin, consider what you would like to explore during our time together. The lists below offer a partial menu of the growth areas and concepts we might explore. From my perspective, there are no limits on the content of our sessions.

Place check marks next to those areas you are most interested in exploring. Space is provided for you to identify other areas you wish to explore.

	Executive and Leadership Growth Areas
	<ul style="list-style-type: none">• Creating trust, safety and openness within your team.
	<ul style="list-style-type: none">• How to have difficult conversations in the work environment.
	<ul style="list-style-type: none">• Listening skills.
	<ul style="list-style-type: none">• How to delegate and empower.
	<ul style="list-style-type: none">• Making, monitoring and enforcing clean agreements.
	<ul style="list-style-type: none">• Handling broken agreements.
	<ul style="list-style-type: none">• How to offer feedback.
	<ul style="list-style-type: none">• How to receive feedback.
	<ul style="list-style-type: none">• How to be persuasive in the presentation of your ideas.

	<ul style="list-style-type: none"> • How to present difficult information.
	<ul style="list-style-type: none"> • When and how to give appreciation / praise.
	<ul style="list-style-type: none"> • How to sense and deal with emotion-laden situations.
	<ul style="list-style-type: none"> • How to engender creativity and brainstorming within your team.
	<ul style="list-style-type: none"> • How to say 'No.'
	<ul style="list-style-type: none"> • How to be more inspirational with different types of people.
	<ul style="list-style-type: none"> • How to "manage up."
	<ul style="list-style-type: none"> • How to mentor.
	<ul style="list-style-type: none"> • Getting out of your comfort zone.
	<ul style="list-style-type: none"> • Knowing when and how to be assertive; when and how to acquiesce.
	<ul style="list-style-type: none"> • Expanding your repertoire of communication styles (at work).

	Whole Life Growth Areas
	<ul style="list-style-type: none"> • Work / life balance.
	<ul style="list-style-type: none"> • How to have difficult conversations in your personal life (e.g., spouse, parents, children).
	<ul style="list-style-type: none"> • Clarity on your “signature strengths,” characteristics of an environment where you will thrive.
	<ul style="list-style-type: none"> • Developing a personal mission statement.
	<ul style="list-style-type: none"> • Developing a rolling 12-month set of personal life goals and action plans.
	<ul style="list-style-type: none"> • Developing greater emotional intelligence.
	<ul style="list-style-type: none"> • Exploring and transforming your insecurities.
	<ul style="list-style-type: none"> • Enlisting mentors; establishing a personal advisory board.
	<ul style="list-style-type: none"> • Time management: focusing on the important vs. the urgent.
	<ul style="list-style-type: none"> • Approaching life with more curiosity vs. defensiveness, criticism or cynicism.
	<ul style="list-style-type: none"> • Developing patience.
	<ul style="list-style-type: none"> • Developing discipline.

	<ul style="list-style-type: none"> • Expanding your repertoire of communication styles.
	<ul style="list-style-type: none"> • Taking 100% responsibility for whatever is going on in your life (get out of blaming).
	<ul style="list-style-type: none"> • Understanding how you set “Upper Limits” on your life; where you don’t let it get “too good.”
	<ul style="list-style-type: none"> • Understanding your “unconscious commitments” – the areas in your life that you talk about changing, but that never seem to change.
	<ul style="list-style-type: none"> • Identifying, understanding and shifting those parts of you (blind spots, personas or shadows) that sabotage your growth or relationships. Examples include: perfectionist, caretaker, victim, bully, manipulator, cynic, have-to-be-right, rage-aholic, second-guesser, controller, be-nice-and-don’t-confront, deflecting-humorist.
	<ul style="list-style-type: none"> • How to have more fun and joy in your life.

WHAT ARE YOU TOLERATING?

Most people put up with, accept, take on and are dragged down by both their own and other people's behavior, situations, unmet needs, crossed boundaries, incompletions, frustrations, problems and beliefs. These 'tolerations' drain energy!

So, what are you tolerating? What do you allow in your life that is unhealthy? What do you perpetuate despite its drain on your energy or toll on your health and happiness? Take a few minutes to write down anything you sense you are tolerating. As you think of more items, add them to your list.

You do not have to take action immediately. As you name and articulate your tolerations, you will naturally begin to change your behaviors to eliminate or resolve them.

This is an ongoing process. On your own, review this list of tolerations each month. Consider which tolerations persist and are part of a larger pattern. Set a goal on how you choose to shift a toleration to create more energy in your life. As you experience successes, congratulate yourself on your progress. Celebrate when the list grows smaller. Act immediately upon noticing a new toleration or incompleteness in your life. We will review the list during our sessions.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

GOALS TO REACH IN THE NEXT 180 DAYS:

What are the one to two goals you most want to achieve for yourself over the next six months? Select **only** those goals which you are **committed** to achieving; not the ones you should, could, might, wish, think or try to achieve. It is better to have fewer goals that really mean something to you, than a collection of goals that diffuse your focus. In our sessions you will be invited to tune and expand these goals into action steps and intermediate milestones.

As you write your goals, pay attention to language. Write the goal in the first person, present tense – as though you have already completed the goal.

For example, “I have a concise personal mission statement which I embrace fully.” Or “I am a mature, seasoned executive. I empower my associates and enjoy ample time with my wife and children.”

GOALS:

- 1.
- 2.

For each goal, list at least four benefits TO YOU for accomplishing the goal. Benefits to your friends, parents, children, family, organization, etc., do NOT count. If you cannot find four benefits to *you* for completing a goal, it will not happen – there is not enough motivation.

GOAL #1 BENEFITS:

- 1.
- 2.
- 3.
- 4.

GOAL #2 BENEFITS:

- 1.
- 2.
- 3.
- 4.

SESSION PREPARATION QUESTIONS:

In preparation for each of our sessions, review the following:

Get Present.

- How are you doing RIGHT NOW? Mentally, emotionally, relationally, physically, vocationally. Choose meaningful, descriptive words or phrases.

What has happened since the last session?

- What have you accomplished since our last session?
- Where have you noticed yourself “out of alignment” – doing things you do not want to do or not doing things you want to do?
- What are you resisting?
- What did you intend to complete (or commit to complete), but did not?
- What breakthroughs or insights have you experienced since the last session?
- What new decisions or choices have you made?
- Where are you on track?
- Where are you stuck?
- What movement have you experienced in addressing your issues or reaching your goals?
- What untapped opportunities are available to you right now?

Where are your sabotaging behaviors (shadows) showing up? For example ...

- Taking risks
- Making decisions
- Setting boundaries
- Falling into old patterns
- Damaging relationships
- Corrupting commitments or agreements.
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What do you want to have happen at this session?

- Specifically, what do you want to focus on during this session?
- What might be a satisfying outcome to this session ... 1) immediately ... 2) in the coming weeks?
- Where do you need encouragement?
- Where do you need accountability?
- Where do you need advice?