

Your Professional Coach Association's *Coaching Jump Start Tool Kit*

Tools



PROFESSIONAL
COACH
ASSOCIATION

Table of Contents

Business Overview Worksheet	3
Self-Assessment Worksheet	5
Coaching Session Checklist	8
Individual Coaching Plan Worksheet	10
Coaching Feedback Worksheet	12
Coaching Session Agenda	14
SWOT Matrix	15
Root Cause Analysis Worksheet	16
Problem:	16
High Impact Question Worksheet	17
Goal and Milestones Worksheet	18
Accountability Plan	28

Business Overview Worksheet

Business Name:

Contact Information:

Brief History of the Business:

Target Market:

Unique Selling Proposition:

Main Competitors and their USP:

Total Monthly Revenue:

Total Monthly Costs:

Number of Employees or Outsourcers:

Any additional information you think your coach should know:

Self-Assessment Worksheet

1. **What are your main goals for your coaching sessions, in priority order? What do you hope to get out of your coaching sessions?**
2. **What challenges do you face? What is most difficult for you right now?**
3. **What are your 3 biggest strengths?**
4. **What are your 3 main weaknesses?**

5. What ideas do you have for moving forward? (Your coach will review these and offer suggestions)

6. What is your preferred learning style? I.e., do you prefer to see, hear or read in order to learn best?

7. Do you have any ideas on how you'd like coaching sessions conducted? Describe your ideal coaching session.

8. Please write any questions or concerns you have.

Coaching Session Checklist

- Payment arrangements
- Gather all relevant information from client
- Review client information including Self-Assessment Worksheet and Business Overview
- Eliminate/minimize distractions
- Note-taking materials / recording
- Mental preparation
- _____
- _____
- _____
- Allotted time for each session
- Schedule
- Outcomes client hopes to achieve
- Client questions and concerns
- _____

Review / summary

Action steps

Confirm next session time

Other preparations for next session

Questions and concerns

Payment (if being paid per session)

Individual Coaching Plan Worksheet

Client Name:

Contact Details:

Total No. of Sessions:

Frequency of Sessions:

Session Day/Time:

Communication Methods:

Client goals and expectations:

Method for measuring progress:

Preferred learning style:

Special client concerns:

Homework / pre-session planning for you to do:

Ideas for session contents:

Coaching Feedback Worksheet

Client name/date:

Progress made:

(Specific progress made toward goal since last session)

Areas that need improvement:

(Specific areas where the client isn't making progress)

Other:

(Any other relevant feedback)

Action Steps:

(What steps to take to address areas for improvement and/or to reinforce progress)

Coaching Session Agenda

Client Name:

*(*Describe each element, its purpose, and an approximate length of time)*

Agenda Item	Time (00:00 to 00:00, x minutes)
<i>Greetings</i>	
<i>Element 1</i>	
<i>Element 2</i>	
<i>Element 3</i>	
<i>Element 4</i>	
<i>Element 5</i>	
<i>Wrap-up/Next Steps</i>	

**Your session agenda doesn't need 5 elements; keep blank or X out those you don't use*

SWOT Matrix

<p>Strengths</p> <p><i>*What strengths, skills, abilities, advantages, and resources do you now have that give you an advantage?</i></p>	<p>Weaknesses</p> <p><i>*What challenges, lack of skills, obstacles or needs do you now have that put you at a disadvantage?</i></p>
<p>Opportunities</p> <p><i>*What new skills, potential markets, business ventures, resources, and marketing channels, are available that would give you an advantage? (Usually External)</i></p>	<p>Threats</p> <p><i>*What potential problems do you now face that may put you at a disadvantage? (Usually External)</i></p>

Root Cause Analysis Worksheet

Problem:

Answer 1	
Answer 2	
Answer 3	Why?
Answer 4	Why?
Answer 5	
Root Cause	Why?
Solutions	

** You don't have to stop at "5" whys. Just continue on to another page until you get to the root cause. It may not even take 5 to get you there.*

High Impact Question Worksheet

**Prepare open-ended questions to use in your coaching sessions. Brainstorm ones that will make your clients really think about their business, goals, purpose, motivations, challenges, or any other issues that you typically address in your sessions.*

Topic/Issue	Questions for Coaching Sessions
<i>(E.g., Time Management)</i>	<i>(E.g., 'If you could pick just one task to outsource in your business today, what would it be?')</i>

Goal and Milestones Worksheet

<p>Primary Goal:</p> <p><i>Define goal as specifically as possible</i></p>	<p>Deadline:</p>
<p>How will you measure your success?</p>	
<p>What specific milestones are needed to reach your goal?</p>	<p>Milestone 1:</p> <p><u>Deadline:</u></p> <p>Milestone 2:</p> <p><u>Deadline:</u></p> <p>Milestone 3:</p> <p><u>Deadline:</u></p>

	<p>Milestone 4:</p> <p>Deadline:</p>
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<p>Milestone:</p> <p><i>What do you need to complete first to reach your goal?</i></p>	<p>Deadline:</p>
<p>How will you measure your success?</p>	
<p>What specific action steps are needed to reach this milestone?</p>	<p>Action step:</p> <p><u>Deadline:</u></p> <p>Action step:</p> <p><u>Deadline:</u></p> <p>Action step:</p> <p><u>Deadline:</u></p> <p>Action step:</p>

	Deadline:
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<p>Milestone:</p> <p><i>What do you need to complete next to reach your goal?</i></p>	<p>Deadline:</p>
<p>How will you measure your success?</p>	
<p>What specific action steps are needed to reach this milestone?</p>	<p>Action step:</p> <p><u>Deadline:</u></p> <p>Action step:</p> <p><u>Deadline:</u></p> <p>Action step:</p> <p><u>Deadline:</u></p> <p>Action step:</p>

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	Deadline:
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Accountability Plan

Original Goals:

Goals Achieved:

Next Goals and/or Milestones:

The Big Three:

**What are your top 3 strategies for reaching your goals?*

Priorities to Focus On:

**These can be strategies, behaviors, actions or other important items that came out of the coaching and review of your progress.*

Action Steps:

**What are the key actions you are going to take next to continue to work towards your goals? Put them in priority order.*

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Where to get help:

**This could include forums, a membership site, website resources, or other places to go when you have a question.*

Essential Resources