

## Coaching Welcome Packet

Congratulations on your decision to work with a coach. Coaching can truly be a transformational experience! You may be wondering, what is coaching? The International Coaching Federation defines coaching as: “Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.”<sup>1</sup> That’s my goal...to inspire you to maximize your personal and professional potential. Think about the possibilities!

As your coach, I will support you by:

- Using a client-centered focus
- Actively listening
- Asking questions
- Helping you explore options
- Helping you prioritize actions
- Asking about progress
- Being there at each step in the process
- Maintaining confidentiality
- Providing optional assessments
- Meeting in person, by phone, or by Skype



Your role is to fully participate in the coaching process. Be open-minded. Honestly respond to questions. Be willing to think of new options. Take new steps. This process can make a difference!

In this packet, you will find the following support materials:

- Coach’s Background
- Code of Ethics
- Phone Etiquette & Session Guidelines
- Call Prep Form
- Coaching Agreement

*Dr. Switzer is an Executive Coach for the whole business and the whole leader. He is insightful, wise, energetic, highly experienced and supremely organized...Merle brings a combination of street smarts, organizational leadership experience, and academic rigor to the table during each Executive Coaching session.” Dave DeRoos, President, Citygate Associates, LLC*

In order to determine if I am the right coach for you, let’s do a complementary session to get acquainted. Call me today at (916) 788-1094 or by email at [Merlin@SwitzerOnLeadership.com](mailto:Merlin@SwitzerOnLeadership.com). I wholeheartedly look forward to working with you and helping you maximize your personal and professional potential!

<sup>1</sup> International Coach Federation, <http://www.coachfederation.org/ICF/For+Coaching+Clients/What+is+a+Coach>, (accessed: December 13, 2007).

## Coach’s Background

**Name:** Dr. Merle Switzer

**Background:** I work exclusively in the field of leadership and serve as a catalyst to equip, inspire, and support leaders, especially business owners, in becoming better stewards of their business and personal lives. I have a strong leadership background professionally and in other contexts. I spent half of my 28-year career in the management and executive ranks of a 2,000+ member organization. I was often called upon to start new programs and improve performance in struggling units. I was selected as a Manager of the Year Finalist on two occasions. I have experience leading in a wide range of leadership contexts, such as in crisis, times of change, and in ethically challenging situations.

For nearly 12 years, I have been helping leaders from many sectors be more effective and organizations reach new heights in performance. I train, speak at conferences, consult, and coach...all different methods of helping leaders be more effective. I am a Professional Certified Coach (PCC) with the International Coach Federation and Certified Management Consultant (CMC) through the Institute of Management Consultants. I have accumulated more than 1,000 hours in coaching leaders. Here is a summary of my education and training.

### Education

Doctor of Strategic Leadership, Leadership Coaching Emphasis	2010
Master of Public Administration	1983
Master of Arts in Criminal Justice	1980
Bachelor of Arts in Criminal Justice, Minor: Business Admin.	1976

### Training

College of Executive Coaching	2015
Coach U – Coaching Core Essentials	2011
International Coaching Federation Conf.	2011
IMC – Annual Conference	2008-10
Master Instructor Update Conference	2006
Problem-Based Learning Certification	2005
Master Instructor	2003
POST Command College	2001

*“I began meeting with Merle in order to get a fresh perspective and renewed energy for running my business. Merle provided me the encouragement and guidance to reengage in thoughtful and strategic ways as I moved my business forward. Merle is a professional for professionals!” Trent Lubiens, President, Center for Hearing Health*

When appropriate, I use tools to assist with coaching. First, I use a behavioral profile, DiSC, to determine the coachee’s behavioral style. Second, I use a 360-assessment tool to obtain feedback, assist the coachee in obtaining feedback and using that feedback to set goals.

## Code of Ethics

*As your coach, I will conduct myself as a professional; be respectful of different approaches to coaching; and recognize that I am also bound by applicable laws and regulations.*

Here are key excerpts from the International Coaching Federation's Code of Ethics, which I embrace. As your coach:

1. I will accurately identify my coaching qualifications, expertise, experience, and certifications.
2. I will conduct myself in accordance with the ICF Code of Ethics in all coaching related activities.
3. I will not knowingly take any personal, professional, or monetary advantage or benefit of the coach-client relationship, except by a form of compensation as agreed in the agreement or contract.
4. I will not knowingly mislead or make false claims about what my client or sponsor will receive from the coaching process or from me as the coach.
5. I will not give my prospective clients or sponsors information or advice I know or believe to be misleading or false.
6. I will honor all agreements or contracts made in the context of professional coaching relationships.
7. I will carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement or contract.
8. I will respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement or contract. I will be alert to indications that the client is no longer benefiting from our coaching relationship.
9. I will maintain the strictest levels of confidentiality with all client and sponsor information. I will have a clear agreement or contract before releasing information to another person, unless required by law.

*"A good business/leadership coach is hard to find. I have had business coaches in the past, mostly in the early years of my 15-year-old small business law firm. I have read scores of leadership books and listened to/attended leadership training/seminars along the way and continue to do so. Merle reminds me every session of what it takes to be a leader, that it doesn't develop in a day, but takes time every day. His detailed insights and leadership knowledge will help me take my firm to the next level."*

*Scott Shibayama, ESQ.*

## Phone Etiquette & Session Guidelines

My desire is to make each coaching session as productive as possible. Here are some things you can do to contribute to a great session, if conducted on the phone.

### Before the session:

- Email the Coaching Call Prep Form and any other information to the coach twenty-four hours prior to the session.
- Clear your mind.
- Remove distractions.
- Turn off other telephones.
- Arrange to be in a place conducive for coaching...quiet and confidential.
- Avoid calling on a cell phone while driving or in areas with intermittent service.
- Have a pencil and pad handy for notes.

### Starting the session:

- Call as close as possible to the scheduled time.
- If the phone is busy or isn't answered, please call back in 5 minutes.

### During the session:

- Please speak clearly and concisely.
- Be present, which requires FOCUS. Your center of interest should be on the session and our conversation. Here are some useful tips:
  - Turn away from your computer and desk, unless you are taking notes on the computer.
  - Remove reading material.
  - Avoid drinking or eating.
  - Take a moment to think before you respond, if needed.

### After the Session:

- Finish writing any notes.
- Make sure the next coaching session is on your calendar.
- Schedule time to follow through on your goals.
- Share your goals with others you trust.

## First Coaching Session

1. What has motivated you to work with a coach?
2. What are the results you want to attain through this coaching?
3. What would a great coach for you look like...someone who could help you reach your goals?
4. Give me a brief overview of who you, i.e., what would be helpful for me to know about you?

## Coaching Prep Form

Please E-mail to [Merlin@SwitzerOnLeadership.com](mailto:Merlin@SwitzerOnLeadership.com) 24 hours prior to Coaching Call.

Name: \_\_\_\_\_ Date/Time: \_\_\_\_\_ Next Session: \_\_\_\_\_

What I have accomplished since our last call (Wins/Successes):

- 
- 
- 

What I wanted to complete, but did not:

- 
- 
- 

The challenges/problems I am facing now:

- 
- 
- 

The opportunities which are available to me right now:

- 
- 
- 

Coach, what I want to focus on during this coaching session is:

- 
- 
- 

What I am committed to do by the next call (to be decided during coaching session):

- 
- 
- 

*Please file this in your Coaching Folder*

## Coaching Agreement

Coaching is an ongoing relationship between a coach and a person who desires coaching. Together, we agree that:

1. Coaching is not therapy, counseling, advice-giving, mental health care, or treatment for substance abuse. The coach is not functioning as a licensed mental health professional, and coaching is not intended as a replacement for counseling, psychiatric interventions, treatment for mental illness, recovery from past abuse, professional medical advice, financial assistance, legal counsel, or other professional services.
2. Coaching is for people who are basically well adjusted, emotionally healthy, functioning effectively, and wanting to make changes in their lives.
3. Coaching is designed to address issues the person being coached would like to consider. These could include (but are not limited to) career development, relationship enhancement, spiritual growth, lifestyle management, life balance, decision-making, and achieving short-term or long-term goals.
4. Coaching will be an ongoing relationship that may take a number of months, although either party can terminate the relationship at any time.
5. Coaching can involve brainstorming, values clarification, the completion of written assignments, education, goal-setting, identifying plans of action, accountability, making requests, agreements to change behavior, examining lifestyles, and questioning.
6. Coaching is most effective when both parties are honest and straightforward in their communication.
7. Coaching will take place by telephone and email unless agreed upon otherwise. It is the responsibility of the person being coached to call the coach on the agreed upon day and time for every coaching session.
8. Both parties will be diligent and prompt for sessions in order to make the most of their time together. If either party must cancel or re-schedule, it will be done at least twenty-four (24) hours in advance. Missed sessions and failing to cancel with the required notice, excepting emergencies, will result in being billed \$250 for the session.

## Coaching Agreement, Continued

9. Payment for services will be discussed prior to coaching and both parties will agree to a fee, form of payment, and initial length of commitment. An invoice will be presented for the first agreement of four months and are payable in 30 days.
10. Coaching is a confidential relationship and the coach agrees to keep all information strictly confidential, except in those situations where such confidentiality would violate the law, where permission has been granted, and with respect to tracking names, hours coached, and contact information where necessary for coaching certification.
11. Coaching assumes that each person in the coaching relationship is guided by his or her values and beliefs.
12. Coaching will be fun, exciting, and rewarding for both parties.
13. Each of the people whose signatures appear below agrees that this agreement represents our mutual understanding of the coaching relationship.

---

Signature (person being coached)

---

Date

---

Signature (coach)

---

Date