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***Buckle up!***

As you and I get underway in our partnership, I invite you to spend some time with the following questions. Some of them will make you pause and reflect, while others will be easier to answer. Our progress will be as much about the quality of your work and reflection and willingness to explore as it will be about me being a great coach.

**Your Contact Info**

Name       E-mail Address       Today’s Date

Best phone number

Your Mailing Address       City       Zip

*My job as a coach is to help you identify and refine what you want to create as you move forward. Along the way we may also identify what is limiting and needs to stop (or be unlearned), and what you want to keep or maintain. As we collaborate on those things, I will keep an eye on your emerging big picture goals (“Mt. Everest”) as well as your weekly and monthly “base camps.” As we agree on direction and outcomes, I like to work in a fairly focused and steady way, co-creating and evaluating as we go. The following questions will help you reflect on where things stand now, what your assets and strengths are and always, on what you want to accomplish.*

The following three questions are both poignant and powerful. You may want to eventually answer all three. Each one has helped people to make choices about what to keep and accelerate, and what to diminish and leave behind. But probably, you being you, one of these questions inspires you more than the others. Pleaserespond ***to the question that most energizes you today.***

***Door #1****: “If you reach the age of 95 and continue to live your life and order your time the way you are right now, what regrets do you think you will have? Do not include things from the past—only things you will regret if you continue your exact present path.”*

***Door #2****: “Imagine we’re sitting here two years from now and you’re grinning at me because you’ve created a great new chapter. What are some of the things you see? What’s going on out there?”*

***Door #3****: “Write about times when you are at your best—great personally and professionally, knowing you are making a difference, connecting with people and projects that mean a lot to you and having a blast.”*

In light of what you just wrote, what is something important you would like to figure out in the next three months?

What do you reflect on as your three greatest accomplishments so far?

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1.
2.

What do you see as your “craft” or an area of true mastery?

What major transitions are you in the midst of, just starting or just wrapping up? (Entering or approaching a new decade, a new relationship, a loss, a new child, recovery, leaving a soul-sucking job, starting a better one, moving/remodeling, changes in your children’s ages/stages, retirement, etc.)

Who are the people in your life who track with you--or would be interested in tracking with you during this time? (friends, family, colleagues, leaders, sponsors)?

**As we begin, I ask that you begin to let them know about what you’re starting to think about, and your best hopes for your work with a coach. Along the way I may ask you to check in with these key people on what they see in your experiments, changes and key questions. We’ll talk about how to do that.**

Coaching will help you to focus on your present and your future. As we work together to sculpt your next chapter, we will explore your core motivations, strengths and values. We’ll probably uncover your best ways of finding greater satisfaction and contribution. Questions of meaning and service are spiritual for most people. Are there spiritual practices or ways of re-charging (reflection, meditation, prayer, journaling, time outdoors) that you expect will be helpful to you as we build our partnership?

**Your “Character Strengths”**

I have a brief inventory for you to take as we get started together. ["The VIA Survey of Character"](http://www.viacharacter.org/www/The-Survey) is a free, well-researched questionnaire that will help you to identify your integrated top five (of twenty-four) "Character Strengths." Because this is part of a research project, you will be asked to register, but they won't spam you. Click on the "VIA Survey" button to begin. After you’ve finished the survey, copy your top five “character strengths” into the boxes below. (No need to purchase a report unless you want to.) As we work together, I will ask you to keep a copy of your top five Character Strengths handy. For an eight minute video summary of the research behind the project, [click here](http://youtu.be/U3nT2KDAGOc).

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If you have found another inventory or assessment (DISC, MBTI, Firo-B, Emergenetics, Insights, Strengthsfinder, Enneagram) to be useful to you, please feel free to send me those results, along with this document, once you’ve completed it.

**SOME IMPORTANT SMALL PRINT**

Though I am still a licensed systems therapist, I began to coach exclusively several years ago to help my client partners to focus on strategies to reach enhanced performance and personal satisfaction—and to strengthen “their ripple effect.” Our coaching relationship is specifically designed to avoid the power differentials that can occur in psychotherapy. As your coach I will be both direct and challenging.

**PAYING FOR COACHING**

Coaching is a significant investment of time and money. I work with most of my clients for six to twelve months as they create sustainable change.

During our first meeting we’ll begin to get an overview, to find our focus and to create our partnership for the coming months. Expect most of our individual meetings to last around fifty minutes. And, if you lead a team, we’ll co-create any sessions with them once we’ve gotten underway with your own goals. Since much of your work is designed to happen between our meetings, your payment includes all check-ins via phone, text and email. And when I see an additional resource that I believe would be useful to you, I'll direct you to them.

I will bill monthly. If your organization is paying for your coaching, I’ll put together an overall statement of work to address to the outcomes you envision for yourself and your team. And we’ll collaborate on where and how we will meet. I’ll send my SOW to you and to whomever handles your purchase orders. Just send me that person’s contact information.

**CANCELLATIONS**

When we book a time together, the time is reserved for you. My practice is to ask for a day’s notice if you have to cancel. If something urgent comes up, please leave a voicemail or text me. If you don’t show up for a scheduled session, I’ll call you. (We can always meet by phone if necessary.) If you don’t show up or contact me, and if I can’t reach you by phone, I’ll charge you for the session. And if I don’t show up or contact you, the next session is on me. If there are conditions of snow and ice, I’ll contact you before 10a on the day of our scheduled appointment, and you can choose: We can either reschedule or meet by phone or videoconferencing.

**CONFIDENTIALITY AND NON-DISCLOSURE**

As your Coach, I will do all in my power to keep confidential all communications between you and me. Communication by e-mail and phone may not be secure. I conduct some sessions in groups, including teleconference groups. If you decide to participate, I ask that you agree to maintain the confidentiality of all information communicated to you by other coaching clients. Bottom line, I will be rigorous about [The International Coach Federation Code of Ethics](http://www.coachfederation.org/about-icf/ethics-%26-regulation/icf-code-of-ethics/). If your employer is paying for your coaching and has an interest in your progress, I’m always curious about the outcomes that he or she is most interested in. Once our overall agenda comes into focus, you can assume that though I may share overall trends with your leadership, the specifics of our conversations will stay between you and me.

**RESOLVING DIFFERENCES**

I want you to be really satisfied with our work together. If, at any time, you feel that your needs are not being addressed, or you are not getting what you want out of our work together, I’ll trust you to tell me so we can problem-solve. We will discuss your needs and concerns, make appropriate adjustments, and continue to work on the goals you define unless you are ready to stop, which we will do whenever you ask.

**SIGN HERE**

Your Signature       Date

Your Coach

 Patricia Ellen Burgin, MA, MCC

That’s it. Thanks for the thoughtfulness and reflection with which you’ve reviewed these questions. You’ve just taken a step toward identifying your opportunities and outcomes, your obstacles and your assets and strengths. Please make a hard copy of “Buckle Up” for yourself and e-mail one to me prior to our first session.

***I’m looking forward to our work together!***

Your Coach,



Patricia Ellen Burgin, MA

Master Certified Coach

Author of [***The Essential Coaching Leader***](http://www.pattyonamazon.com)

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