

Welcome Packet Letter

Read the following, and change the information as necessary.

July 23, 2001

**Jane Doe
555 Main Street
Any Town, CA 94123**

Dear Julie,

I really enjoyed speaking with you last week, and am looking forward to working with you and walking this path of discovery together!

Enclosed on the left side of this Welcome Package is a variety of information about the nature of coaching, how I coach clients, and how to get the most out of your coaching experience. Please read all of the material prior to our initial session.

On the right side of the Welcome Package are a variety of programs and assessments that I use with my clients. Please complete each item and then fax or e-mail me the **Client Data and Forms Checklist** and the **Client Questionnaire** prior to our initial session.

Summary of Welcome Package Forms and Assessments:

Client Data and Forms Checklist

Please complete and fax or e-mail to me prior to our first session. (I will also send you an electronic version of this form via e-mail.)

Client Questionnaire

Please complete and fax or e-mail to me prior to our first session. (I will also send you an electronic version of this form via email.)

Credit Card Authorization Form

Please complete and fax or mail to me if you will be paying your monthly coaching fee via automatic credit card payment. Your discounted coaching fee is \$250/month (pro-rated fee of \$85 for our initial session in July).

Client Coachability Index

This assessment is used to determine if this is a good time for you to work with a coach. Please complete and record your score on the Client Data and Forms Checklist.

Personal Coaching Styles Inventory

This assessment helps me to understand your communication style so that I can coach you most effectively. Please complete and record your score on the Client Data and Forms Checklist.

Wheel of Life

This is a tool for discovering the areas of your life where you might need more balance. Please complete and record your results on the Client Data and Forms Checklist.

Clean Sweep

This checklist is used to identify areas of your life that might require attention. My clients often focus on raising their Clean Sweep score during the coaching relationship in order to enjoy more energy, vitality, and happiness. Please complete and record your score on the Client Data and Forms Checklist.

Coaching Prep Form

Please use this form (or the electronic version) to prepare a written agenda for each coaching call. (You do not need to use it for our initial session, however I recommend you use it for all subsequent calls.)

Additional Material:

Personal Foundation Program

I provide this material as a service to my clients; feel free to review at your convenience. As we begin our coaching relationship, we can discuss *if* and *how* you would like to use this program.

Have fun reviewing these materials, and please call or e-mail me if you have any questions. I look forward to receiving your [Client Data and Forms Checklist](#) and your [Client Questionnaire](#) prior to our initial session. Please bring this Welcome Package to our initial session. See you on Monday July 30th at 11:00 am at The Coffee Roastery on Chestnut Street!

Warmest Regards,

Michelle Schubnel
Personal & Business Coach

michelle@summitcoaching.com

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