

# Executive Blueprints



## Coaching Agenda Process Review

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### Welcome!

Coaching is an ongoing relationship that helps people produce extraordinary results in their lives, careers, businesses and organizations. Through the process of coaching, clients deepen their learning, improve their performance and enhance their quality of life. Clients obtain a positive motivational reflection of individual attributes and capabilities, acquiring new skills and inspiration. In organizations, coaching reinforces the value of human capital, aligning talents for an enriching work experience.

In each meeting, the client chooses the focus of the conversation, while the coach applies active listening techniques, contributes observations and poses reflective questions. The interaction creates clarity and moves the client into action. Coaching accelerates the client's progress by providing greater focus and awareness of choice. Coaching concentrates on the current situation for the client, aligns with the goals of the client, and works with the client to uncover or develop attributes to attain those goals.



*Have patience with all things, but chiefly have patience with yourself.  
Do not lose courage in considering you own imperfections but  
instantly set about remedying them - every day begin the task anew.*

*- Saint Francis de Sales*

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## **I. Preparation**

- A. Agenda and Process Review
- B. Personal Profile
- C. Client / Coach Introduction

## **II. Expectations and Agreements**

- A. Confidentiality
- B. Meeting times
- C. Commitments/Obstacles
- D. Client/Coach Responsibilities
- E. Agreement

## **III. Development Plan**

- A. Personal Profile Review
- B. Session Preparation Form
- C. Wheels of Balance
- D. Define Situation and Goals

## **IV. Quarterly Development Review**

- A. Accomplishments
- B. Initiatives / Goals
- C. Obstacles / Challenges / Resources
- D. Adjustments / Alignment
- E. Schedules & Metrics



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## Responsibilities

### Client Responsibilities

The client is responsible for:

- Selecting the coach
- Clarifying goals, setting the agenda and directing the coaching process
- Giving the coaching relationship and process time to develop, and to demonstrate results
- Being open, truthful, and direct in coaching sessions and communications
- Being open to difficult challenges by the coach, and challenging his/her own assumptions, habits and ways of working
- Taking a reasonable level of responsible risk and experimenting with new behaviors
- Taking coaching goals seriously and following through on commitments
- Keeping track of personal progress

### Coach Responsibilities

The coach is responsible for:

- Maintaining confidentiality of the coaching relationship and articulating the limits of that confidentiality
- Ensuring the client has a clear agenda
- Holding the client accountable for taking actions and following-up on commitments
- Providing direct and honest feedback
- Challenging the client to step outside their comfort zone at times, in service of their learning and achieving their agenda
- Being passionate about helping the client succeed, and willing to share his/her personal experience with the client
- Being action oriented and business minded
- Coaching for both performance and development
- Having a clear set of principles and Ethics that guide his/her coaching
- Maintaining a well grounded and flexible approach to coaching



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