**The First Meeting!**

**Things to bring to the first meeting:**

* Pre-survey (you can find a copy in the reporting tools folder on the Dropbox)
* Coach and Client Contract
* Personal Planner/Calendar
* Notepaper
* Your contact information (to share with client)

**Once you are there:**

1. **It’s ok to start out with small talk**! Remember, you are building a relationship. Find out what is going on in their life, and share a little about yourself.
2. **Fill out the coach/client agreement**: Explain as best you can that coaching is the conversation. You are there to support your client, but the work is up to them. And setting the agenda is up to them.
3. **Have client fill out the pre-survey.** If you sense they need assistance, offer to fill it out together (they still have to choose the answers!).
4. **Do some goal setting.** Use the information from the pre-survey and your earlier conversation to understand where the client is trying to go and why. Figure out what’s important to them. You can help guide the conversation, but it’s up to the client to choose their goals. This is the Competencies and Outcome portion of the COACH model. The goals you set today can always change later.
5. **Plan steps.** What can the client do today/ this week/ this month to move toward their goal? Will they commit to those actions and how will you know they have done it? This is the Action and Check In portion of the COACH model. It’s also a great place to employ SMART goals.
6. **Set the next meeting.** Time, date, location, should you spend some of that cash or save it?

**After the Meeting:**

Scan and email the pre-survey to Steve ([ssimmons@accountingaidsociety.org](mailto:ssimmons@accountingaidsociety.org)) or fax it to 313-556-1941.

**If you cannot scan or fax documents**, let Gabe and Steve know **as soon as possible** so they can work out an alternate way to obtain your pre-survey.

**Update the coach/client interaction tracker**, more information is available on the Dropbox.

**Sample Questions:**

Use these questions if you are having trouble thinking about what to say to clients. They can help bring about a reflective experience to aid the coaching process. Feel free to print them and use them as homework for the client to complete as well.

**Competencies**

1. What are you most proud of? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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2. Tell me about your support system\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. What words describe you at your best? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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4. What words describe you when you are at less than your best?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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5. What words describe how you feel about your career? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Outcome**

5. What is the compliment or acknowledgment you hear most often about yourself? \_\_\_\_\_\_\_\_\_\_\_\_\_

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6. What dream of yours is still unfulfilled? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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7. On a scale of one to ten how satisfied are you with (issue they want to be coached on)? What would one higher look like? What would a ten look like? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. What activities have meaning and heart for you?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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9. Imagine you can have one wish fulfilled. What one thing would you change? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Action**

10. What steps can you take to meet this goal? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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11. How can we make this goal SMART? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**CHeck-in**

12. How/When will I hear from you? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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13. How can we celebrate when you achieve this goal? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**About Coaching You**

1. What will make this coaching relationship rewarding for you? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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2. What approaches encourage or motivate you? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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3. What approaches discourage or de-motivate you?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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4. How will you know you are receiving value from this coaching relationship? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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5. What else would you like me to know about you?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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