

# *LIFE COACHING*

## *WELCOME*

## *PACKET*

*Design Your Dream.....Declare Your Destiny!*

Gary Vann, PhD  
3491 Hartman Rd. Traverse City, Mi. 49684  
231.947.2990 – TX  
231.947.5862 - FX  
[greatcoaching@garyvannphd.com](mailto:greatcoaching@garyvannphd.com)  
[www.garyvannphd.com](http://www.garyvannphd.com)

## Welcome to Life Coaching!

The decision to add Life Coaching to develop yourself and your life is a pivotal point for you in your evolution. Lets get real...life on this planet is short. That said, my own personal Life Coach and Life Coaching has made and continues to make quantum growth possible and has freed me from a variety of life-long limiting beliefs, feelings and behaviors. What I want is for you to also have an excellent and life-changing great coaching experience, which is the whole point of Life Coaching to begin with.

This Coaching Packet is important to both you and I, in that it will rapidly allow us to get to know each other and to identify what you have set as your goals and vision for the future. It will also build intentionality, focus you in the direction you want to go in and make it easier to get what you want in life.

Most of our Life Coaching sessions will be via half-hour telephone sessions in addition to emails and at times faxes. All of the sessions can be held in Traverse City, Michigan, if you are available. I am also available for family owned business coaching projects and consulting at your location if that is needed and an interest. Having our first session in person can be helpful if we can arrange to meet, but it is not necessary. As a trained Life Coach and graduate of the Institute for Life Coach Training, along with over 30 years of experience guiding people to grow and change their lives and relationships, I am absolutely confident that you and I will be able to make great progress in meeting your target goals.

Please request the *complete* **Life Coaching Welcome Packet** in Word Format to be sent to you by contacting me at: [greatcoaching@garyvannphd.com](mailto:greatcoaching@garyvannphd.com) . Then send all of the orientation and preparation forms by either US Mail, fax or email them to me. Also, providing us with a prep-sheet prior to our coaching sessions is very important to both you and I. Please forward it to me at least a day *before* our session so I can review it and be ready to coach you on what you want for yourself. I look forward to working with you!

Gary

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## Client Policies and Procedures

- Fees:** You may either pay by credit card or check in advance for that month – it’s your choice.
- Procedures:** Please call on time and come to our session with updates, progress and current challenges. Let me know what you want to work on and be ready to be coached. **Make copies of the enclosed Session Preparation Form on page 4. Fax or e-mail the form before each call. The agenda is all yours, client generated and coach encouraged.**
- Calls:** Our agreement includes a set amount of half-hour calls. If you or I are on vacation, we may spend more time before you/I leave and after you/I return.
- Changes:** Kindly give me 24 hours notice if you have to cancel or reschedule a session. I will do likewise. If you have an emergency, we can work around it. Otherwise, missed calls are not made up.
- Extra Time:** You may call between sessions if you need “spot coaching,” have a problem or can’t wait to share a win with me. (You can also fax or e-mail me). I enjoy delivering this extra level of service. I do not bill for this additional time of this type, but ask that you please keep the extra calls to five or ten minutes. When you leave a message, let me know if you want a call back or if you are just sharing your progress.
- Problems:** I want you to be satisfied with our relationship. If I ever say or do something that you get upset about or does not feel right, please bring it up. I am committed to doing what is necessary to have you be satisfied.
- Final Note:** With transformational Life Coaching, it is necessary for you to implement and apply the coaching that is given to create success. You have hired me as your coach so you can learn to do things differently than you have before. **If you choose to not apply the coaching and keep doing what you have always done, you will get the same results you have always had in the past.**

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**Life Coaching Agreement**

## Life Coaching Agreement

**Please review, complete, sign where indicated and return to me via fax or e-mail.**

Name: \_\_\_\_\_

Initial Term: \_\_\_\_ Months, From \_\_\_\_\_ Through \_\_\_\_\_

Fee:     \$ \_\_\_\_\_ Per Month,   \$ \_\_\_\_\_ For the Project

Session Day: \_\_\_\_\_ Session Time: \_\_\_\_\_

Number of Sessions and fee per month (check off): **(There is no charge for the introductory/orientation session)**

- 1 - \$100.00
- 2 - \$200.00
- 3 - \$300.00
- 4 - \$400.00

Phone and fee arrangements:

1. Client calls the coach at the scheduled time.
2. Client pays for the long-distance charges, if any.
3. Client pays fee in advance.

1. As a client, I understand and agree that I am fully responsible for my well being during my coaching calls including my choices and decisions. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy and that professional referral options will be given to you if needed.
2. I understand that "Life Coaching" is a relationship I have with my coach that is designed to facilitate the creation/development of personal, professional and/or business goals and to develop and carry out a strategy/plan for achieving those goals.
3. I understand that life coaching is a comprehensive process that may involve all of the life tasks including; work finances, wellness, relationships, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
4. I understand that life coaching does not treat mental disorders as defined by the American Psychological Association. I understand that life coaching is not a substitute for counseling, psychotherapy; mental health care, physical health care, substance abuse treatment and I will not use it in place of form of psychotherapy.
5. I promise that if I am currently in psychotherapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with this life coaching relationship.
6. I understand that certain topics may be anonymously shared with other life coaching professionals for training or consultation purposes.
7. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law.
8. I understand that life coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, psychological, medical, financial, business, spiritual or other matters. I understand that all decisions in these areas are exclusively mine and acknowledge that my decisions and my actions regarding them are my responsibility.

I have read and agree to the above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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## Client Data Form – Part A.

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Business Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Business Address: \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Fax Line: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ URL Address: \_\_\_\_\_

Can I leave messages everywhere? \_\_\_\_ If not, explain: \_\_\_\_\_

Preferred means of communication: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Other significant dates: \_\_\_\_\_

Preferred Coaching Schedule: (day) \_\_\_\_\_ (time) \_\_\_\_\_

Names of important people in your life (spouse, partner, children, friends, etc.):

\_\_\_\_\_

\_\_\_\_\_

Emergency Contact: \_\_\_\_\_

Other information you want me to know: \_\_\_\_\_

\_\_\_\_\_

How did you hear about my coaching practice? \_\_\_\_\_

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## **Client Data Form - Part B.**

What influenced your decision to work with a life coach? \_\_\_\_\_

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Have you ever been coached before? If so, please describe the experience. \_\_\_\_\_

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Do you have specific goals for the coaching relationship? If not, what might be one goal that comes to mind?

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What are your significant commitments? \_\_\_\_\_

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What would your perfect life look like? \_\_\_\_\_

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What are two of your dreams? \_\_\_\_\_

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What dreams have you become discouraged about? \_\_\_\_\_

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## **Client Data Form – Part C.**

Where do you want to focus our energies first? \_\_\_\_\_

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What aspects of your life are you pleased with? \_\_\_\_\_

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What aspects of your life are you displeased with? \_\_\_\_\_

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What are some of your most important values? \_\_\_\_\_

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What situation or - maybe who *seems* to stop you from having the life you want to have at this time?

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# **Template For My Personal Vision Statement**

## **Part - A**

I strongly and sincerely believe that we are each the creator and director of our own life drama, able to create “on purpose” what our life will look like, feel like and be like.

This is your opportunity and responsibility to write the script, be the producer and director, and to gather the other characters in your life drama. Some people live painful or unfulfilling dramas. However, if you are conscious and on purpose with what you want your life to be, it has a much greater chance of evolving into your vision.

So, where does one begin designing one’s life? First of all you can begin to revisit and remember dreams and desires from your younger years – particularly before the age of 12. What drove you? What did you want to become? Who did you admire? Divide your life into thirds and ask yourself, “What accomplishments or happy events occurred in each third of my life?” What values were represented? Are those values still present?

### **Exercise: My Personal Lifestyle**

Read through the following sentences and answer as if your life were exactly as you would like it to be. Let this be an accurate reflection of what you envision for your **ideal** life. After you have completed all these pieces of your Personal Vision, you can write a summary paragraph that encapsulates all of your intentions, desires and values.

1. In my family – personal life, I am committed to: \_\_\_\_\_  
\_\_\_\_\_ (Spending time with, enjoying, teaching, working with, taking care of)  
my \_\_\_\_\_ (friends, pets, family, etc.)

2. For recreation and fun, I enjoy \_\_\_\_\_  
\_\_\_\_\_

3. My home environment will be \_\_\_\_\_  
\_\_\_\_\_

(Nurturing, comfortable, a place for entertainment, on the water, spacious, cozy, have a home office, in the city, country, etc.)

4. My retirement home will be \_\_\_\_\_  
\_\_\_\_\_

(A cabin in the woods, seaside condo, small restored Victorian home, large spacious home to accommodate visiting guests, relatives, friends, grandchildren, a motor home, houseboat, etc.)

5. My hobbies, passions, interests are \_\_\_\_\_  
\_\_\_\_\_

(Travel, politics, reading, writing, sports, gardening, martial arts, etc.)

6. I will maintain (or regain) my overall health by \_\_\_\_\_  
\_\_\_\_\_

(Exercising, eating healthy and proper amounts of foods, lowering my stress, meditating, prayer, etc.)

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# Template for My Personal Vision Statement

## Part -B

### Exercise: My Professional Lifestyle

1. I will concentrate my professional and business life in the areas of \_\_\_\_\_

\_\_\_\_\_  
(Fill in with types of work, customers, clients, niche, specialty, etc.)

2. My office environment will be \_\_\_\_\_

\_\_\_\_\_  
(Spacious, comfortable, a home office, efficient, well-organized, high tech, etc.)

3. My financial plans are to \_\_\_\_\_

\_\_\_\_\_  
(Earn a minimum of \_\_\_\_\_ per year, save 20% of my income, leverage my investments to retire at age \_\_\_\_  
With a yearly income of \_\_\_\_\_, allow for 4 vacations a year, buy a retirement home, boat,  
etc.....)

4. My professional philosophy is one of \_\_\_\_\_

\_\_\_\_\_  
( Integrity, leadership, dedication to my customers, clients, providing superior service and modeling for others, known as an expert in my field, etc.)

### My Personal Vision Worksheet

Using the information you have assembled about yourself in the preceding exercises, write your personal Vision in the following **paragraph form**. Think about a rough draft now and then polish it in the weeks to come.

**In my personal life I am committed to** \_\_\_\_\_

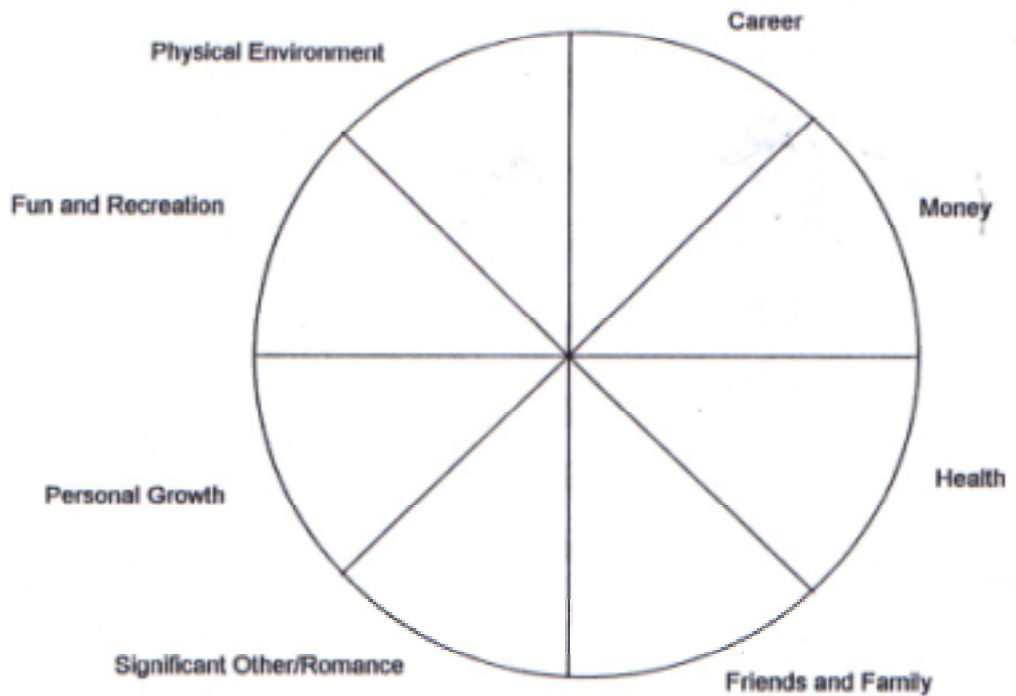
\_\_\_\_\_

**In my professional life I am committed to** \_\_\_\_\_

\_\_\_\_\_

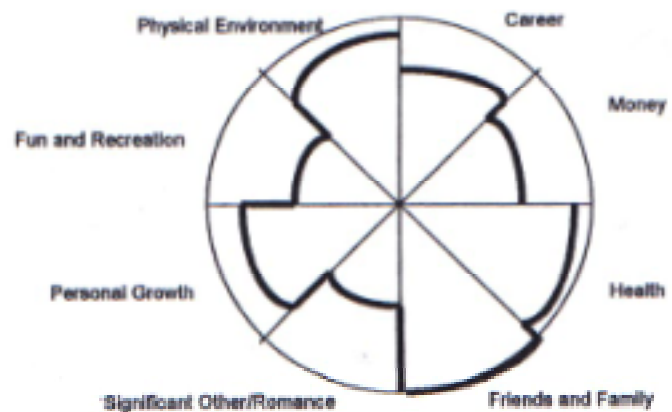
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## Life Balance Wheel



### Example

Directions: The eight sections in the Life Balance Wheel represent balance. Regarding the center of the wheel as 0 and the outer edge as 10, rank your level of satisfaction with each life area by drawing a straight or curved line to create a new outer edge (see example). The new perimeter of the circle represents your Life Balance Wheel. How bumpy would the ride be if this were a real wheel?



# Goals and Intentions

## Goals To Reach In The Next 180 Days

**Instructions:** When you set a goal, there is a specific point in time by which you have accomplished it or not. It is measurable and specific. You have increased your income by 30 % by July 31<sup>st</sup>. or not. **Intentions are your determinations** and decisions that help you bring your goals into reality. Writing them down often has an almost magical effect of bringing them to completion. Example: "I intend to increase my income by 30% by July 31<sup>st</sup>. by being open to other job opportunities and by giving my current clients/customers extraordinary service." Using the **Life Balance Wheel** as your guide, identify your goals (with specific due dates and claim or express your intentions for each goal.

	<u>Goals</u>	<u>Intentions</u>
<b>Career</b>	1. _____ 2. _____	
<b>Money</b>	1. _____ 2. _____	
<b>Wellness</b>	1. _____ 2. _____	
<b>Friends/Family</b>	1. _____ 2. _____	
<b>Significant Other</b>	1. _____ 2. _____	
<b>Personal Growth</b>	1. _____ 2. _____	
<b>Fun/Recreation</b>	1. _____ 2. _____	
<b>Physical Environment</b>	1. _____ 2. _____	

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## The First Step: De-Cluttering

Unfortunately, we often put up with, accept, take on and seem to think that people and situations that we may have come to ignore in our lives drag us down. Rather than change them, we often maintain irrational and mistaken beliefs that we are victims of situations that are out of our control. However, now is the time to identify those things and situations that drain your energy for positive activities. As you think of more items, add them to your list to be eliminated.

You can choose or not choose to do anything about these obstacles right now. However, just bringing them into your conscious mind can forward the action and create intention. As a result, you are now bringing them to the forefront of your thinking where you will naturally start eliminating, fixing or resolving them.

### ENERGY DRAINERS AT WORK

### ENERGY DRAINERS AT HOME

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_
20. \_\_\_\_\_

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**Session Preparation Form**

Date: \_\_\_\_\_

To get the most out of our coaching session it is best to spend some quiet time minutes preparing for it. Please email or fax me a copy before your session.

**What I have accomplished since our last session...my wins or victories:**

β \_\_\_\_\_

β \_\_\_\_\_

**What I did not achieve, but still want to be held accountable for:**

β \_\_\_\_\_

β \_\_\_\_\_

**Challenges I am facing right now:**

β \_\_\_\_\_

β \_\_\_\_\_

**What I am appreciative of, grateful and/or thankful for:**

β \_\_\_\_\_

β \_\_\_\_\_

**How I want to use my coaching today and what I want to get out of this session:**

β \_\_\_\_\_

β \_\_\_\_\_

**What I commit to doing before the next session:**

β \_\_\_\_\_

β \_\_\_\_\_

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