



The Coaching Pre-Call Planning Form to Accelerate Your Success

Coaching Pre-Call Prep Form

Before our next coaching session, (and prior to every coaching session) please respond to the five sections below. Be precise when completing this form. Please try to complete and send this at least two days before your scheduled meeting and send to (your email). This form will ensure you get the value you expect during the time with your coach and keep you focused on the goals, challenges, and results that are most important to you. During every coaching session, we will always respect your confidentiality. Please note that what is discussed during coaching will always remain between the coach and coachee, unless agreed upon otherwise.

Save this as a master and work from copies of this form each week. It will expedite your work, maximize the value of the time with your coach and keep you focused on your coaching objectives, while demonstrating your progress and wins. Your vision and goals, once created, will serve as a reminder on every prep form to ensure you're focusing on the right activities that align with them and your business objectives.

PERSONAL VISION: TBD

GOALS: TBD

- 1.
- 2.
- 3.

1.YOUR INTENTION AND EXPECTATIONS:

Here's what I want to achieve during my time with my coach. Please list specific and measurable outcomes, challenges, a strategy or skill to develop or improve (Examples: leadership/coaching, time management, sales, communication, relationships, personal brand, etc.), a desired shift in thinking or attitude, or a specific result you want. You can also share a situational issue regarding a specific scenario and how you handled it, so the coach can offer guidance, feedback, and what could be done, if anything, to achieve a better, more productive outcome the next time.

2.ACHIEVEMENTS:

What have you accomplished since our last meeting together as it relates to the coaching and development of your team and/or your personal growth. (Examples: Commitments honored, wins, insights, improved attitude, personal or professional successes, behavioral shifts, process/strategy upgrade, an eliminated toleration, better time/self-management.)

3.FEAR/CONFIDENCE:

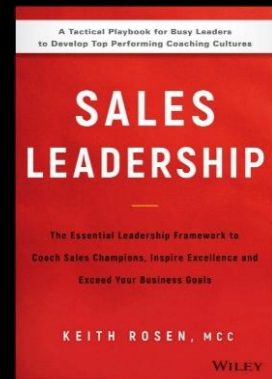
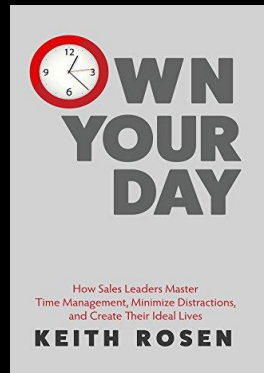
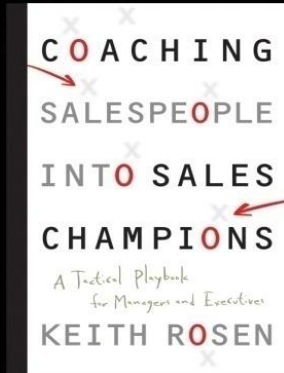
- a. The fear that gets in my way to achieving greater results is _____.
- b. What prevents me from developing the unconditional confidence of a champion is _____.
- c. A toxic/negative belief that's been holding me back from living my potential is _____.
- d. On a scale of 1—10, where 10 represents being 100% confident in myself, how would I rate myself this week? _____.
- e. On a scale of 1—10, where 10 represents being fearless and leveraging fear as my ally, how would I rate myself this week? _____.

4. PERSONAL ACCOUNTABILITY/COMMITMENTS:

- a. What I said I would complete and am proud of doing so. _____.
- b. What I said I would have completed/worked on but didn't. _____.
- c. How am I doing regarding honoring my vision, priorities and values?
- d. How consistently do I engage in the daily activities that I've committed to in my routine? _____.
- e. Here's what I commit to accomplishing by our next call. (This can also be co-created together during the call.) _____.
- f. On a scale of 1—10, where 10 represents full accountability, how would I rate myself this week? _____.

5. TAKING ACTION AND FEEDBACK FOR THE COACH:

- a. How are the actions/activities I'm engaging in moving me closer to and/or farther from my goals?
- b. What do I need to do to get out of my own way so that I can create a breakthrough?
- c. What would you like your coach to do more of/less of, if anything, during and after each meeting?
- d. How do you want your coach to continually hold you accountable and be your accountability partner in a way that would sound supportive, not negative?
- e. How do you want your coach to follow up with you if you don't honor the commitments you've made? How would you like your coach to approach you?



Pay it forward. Feel free to share this document.

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- Develop the Language and Habit of Coaching -

The Official Language of Leadership
that Develops Champions™

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