Coaching Worksheet

This worksheet provides a template for coaching either yourself or others. It follows the GROW Model of coaching[1] but incorporates multiple assessment tools, including a wheel of life assessment, a strengths assessment, two personality assessments, a needs assessment, a values assessment, a scaling exercise and a number of challenging questions. It is designed to guide you through the process of exploring yourself to setting specific goals to creating a customized action plan.

Explore

Before moving into the goal-setting phase of this worksheet, you will work through several exercises that will help you to evaluate yourself and your life. Complete these exercises before moving forward. What you learn from these will be valuable when it comes time to set your goals and create an action plan.

Wheel of Life[2]

Each sector of the Wheel of Life represents a different area in your life. With 1 meaning complete dissatisfaction and 10 meaning complete satisfaction, rank your level of satisfaction in each area of your life by tracing the section of the dotted line that corresponds to the number you have chosen. When you are finished, you will have a visual of your level of satisfaction in each area of life and a clearer picture of how you and your coach might be able to move forward.

Strengths Assessment[3]

Circle your strengths

Achiever	Activating	Positivity	Learner
Responsibility	Commanding	Harmony	Analytical
Consistency	Influencer	Adaptability	Strategic
Arranger	Competitive	Individualization	Ideas
Discipline	Maximizing	Empathy	Futuristic
Focus	Communication	Developer	Input
Deliberate	Self-Assurance	Includer	Context

List your three key strengths

1	**2**	**3**

Personality Assessments

The following personality and values assessments are designed to help you understand who you are. The full assessments can be found in their full versions online. But the shortened versions, in which you self-identify the personality traits and values that *you think* best fit you, will give you insight into who you are and why you think, feel and act the way you do. Please remember that these are only tools designed to help you to think about yourself in new ways—they are *not* perfect. If you feel you any of the assessments misrepresent you or place you in a box, discard them immediately.

Myers-Briggs Personality Test[4]

Read the descriptions of the personality traits in the boxes below. In the blank box to the left, write the letter that corresponds to the trait in each of the four boxes that best describes you. If you are introverted and not extroverted, for example, then write "I" in the box. After you have selected four of the eight traits and written them in the boxes to the left, write these on the blank line below (e.g. ISFJ or ENTP). To learn more about what this means, discuss these findings with your coach or visit http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/ for further explanation.

	Introverted (I) **Extroverted (E)**	Most comfortable with internal thoughts, interests, ideas and imagination. Most comfortable with external activities, excitements and people.
	Sensing (S) **Intuitive (I)**	Notice all the sensory details of the present. Strive to understand and form general patterns about the future.
	Thinking (T) **Feeling (F)**	Make decisions based on facts and information. Make decisions based on likes or dislikes and the impact they have on others.
	Judging (J) **Perceiving (P)**	Approach life with preparation, planning, and organization. Approach life with flexibility and adaptability.

My four personality traits are: _____.

DISC Personality Model[5]

The DISC Model is yet another tool that helps us understand who we are. It rests on two observations.

One, people tend to be either outgoing or reserved. Outgoing people have an internal motor that is always ready to engage, while reserved people tend to engage their motors more slowly or cautiously.

Two, people tend to be either people-oriented or task-oriented. People oriented-people are more in-tune to the people around them, while task-oriented people tend to be focused on getting tasks done.

Think about yourself on a daily basis: when you're alone, in public, studying, with friends and so forth. Which two traits best fit you?

Now, mark the quadrant where these two traits intersect. Which quadrant(s) did you land in—orange, blue, green, purple? What might this tell you about yourself? How can you use this insight about your personality moving forward?

Needs Assessment

Read the list of needs below. Identify approximately ten that you believe you must have in order to be your best. Ask yourself, “If I had this, would I be able to reach my goals?” After identifying ten, narrow this list to the four that are most important to you. Write these four on the lines provided at the bottom of the page.

List of Needs

BE ACCEPTED	Approved	Included	Respected	Popular
TO ACCOMPLISH	Achieve	Fulfill	Realize	Attain
BE LOVED	Liked	Treasured	Esteemed	Adored
BE RIGHT	Correct	Not Mistaken	Morally Right	Understood
BE CARED FOR	Encouraged	Attention	Cared about	Saved
CERTAINTY	Clarity	Accuracy	Assurance	Promises
APPRECIATION	Acknowledged	Noticed	Remembered	Complimented
BE COMFORTABLE	Luxury	Excess	Prosperity	Cared For
TO COMMUNICATE	Be heard	Make a Point	Share	Talk
TO CONTROL	Command	Manage	Correct Others	Not Ignored
BE NEEDED	Improve Others	Useful	Please Others	Give
DUTY	Obligated	Do Right	Follow	Prove Self
BE FREE	Unrestricted	Independent	Autonomous	Liberated
HONESTY	Sincerity	Loyalty	No secrets	Tell All
ORDER	Perfection	Symmetry	Consistency	Checklist
PEACE	Quietness	Reconciliation	Agreement	Balance
POWER	Authority	Stamina	Results	Influence
SAFETY	Security	Protection	Stability	Maintain
WORK	Career	Performance	Busy	Make it Happen

My Four Needs

1. _____

2. _____

3. _____

4. _____

Values Assessment

Read the list of values below. Identify approximately ten that you believe you must have in order to be your best. Ask yourself, “What is most important to me? What do I value more than anything else?” After identifying ten, narrow this list to the four that are most important to you. Write these four on the lines provided at the bottom of the page.

List of Values

Achievement	Community	Friendships	Helping Others	Physical Challenge
Privacy	Advancement	Promotion	Arts	Growth
Helping Society	Pleasure	Public Service	Adventure	Challenging Problems
Having a Family	Honesty	Purity	Affection	Change
Variety	Power	Authority	Independence	Tranquility
Quality	Security	Work	Creativity	Supervising Others
Knowledge	Self-Respect	Efficiency	Decisiveness	Merit
Time	Leadership	Freedom	Serenity	Ethical Practice
Democracy	Money	Truth	Order	Excellence
Nature	Competence	Integrity	Intimacy	Religion
Influencing Others	Competition	Quality	Location	Intellectual Status
Reputation	Sophistication	Cooperation	Involvement	Ecological Awareness
Inner Harmony	Responsibility	Accountability	Wisdom	Country
Fame	Job	Recognition	Fast Living	Work under Pressure
Loyalty	Financial Gain	Freedom	Group Work	Personal Development
Economic Security	Market Position	Work Alone	Wealth	Excitement
Status	Effectiveness	Meaning	Spirituality	Honest Friendships

My Four Values

1. _____

2. _____

3. _____

4. _____

Brainstorming—Interests

Definition of Success

- What is your definition of success?

Favorite Pastimes

- What kinds of activities did you love to do as a child?
- Do you do anything in your life today that is similar?
- If not, what could you do now to align with those favorite pastimes?
- What hobbies or pastimes do you engage in where time seems to fly by?

Favorite Subjects

- What were your favorite subjects in school?
- Why did you like those subjects?
- What are you most interested in today?
- What topics do you most enjoy discussing with your friends?
- What is it you enjoy about those topics?

Favorite Activities

- What have you always done well?
- What do you think you could do well but haven't tried yet?

At My Best Activity[6]

- A time when I was at my best was . . .
- The best thing about me is . . .
- What I enjoy doing the most is . . .
- The best time in my life was . . .
- My most fulfilling experience was . . .
- I earn my best grades when I . . .
- The best job or project I ever had was . . .
- The things I like best about myself are . . .

Goal

Based on what you know about yourself and your situation, begin to frame this insight into a goal. Remember only to set a goal if it is meaningful to you.

Questionnaire

- What are you building toward?
- What is it you want to achieve?
- What is your desired outcome? Be specific.
- What would you like to achieve each time you meet with your coach?
- What are your overall aspirations? This semester? In college? In life?

What is your Goal?

Write your goal in the orange and white target. Be specific. In the three boxes, begin to unpack your goal. That is, begin to break it down into its different parts. Describe what you would *like* for your thoughts to be once you accomplish your goal, and how you would *like* to be feeling at that point. In other words, use these boxes to explain *why* the goal that you've written in the target is important *to you*.

Reality

Scaling

On a scale of 1–10, with 10 meaning you've achieved your GOAL and 1 meaning things could not be any worse, where are you today with respect to your GOAL?

1 2 3 4 5 6 7 8 9 10

- Why did you place yourself at # and not lower on the scale?
- Imagine yourself at a 10. What does that look like? Be specific.
  - How do you feel having achieved your goal?
  - What are your thoughts about achieving your goal?
  - What are people around you saying?
  - How do you reward yourself for your accomplishment?
- Now, step back to right now. Imagine yourself one number higher than you currently are on that scale.
- You're not yet at a 10 (as you just imagined it) but one step closer. What does that look like?

Questionnaire

- What are the benefits of the present situation?
- How do others perceive this situation?
- What is getting in the way of your resolving this situation?
- How similar is this situation to others you have faced?
- What feedback have you had about the current situation?
- What do you do really well?
- What have you achieved already? Here? In your life?

Options

Strengths

- Recall your strengths from above.
- How will you use your strengths to meet your GOAL?

Questionnaire

- What are your options?
- What could you do?
- What else could you do?
- If you could do anything, what would it be?
- If you were to advise a friend facing the same situation, what would you suggest he or she do?
- What might really unlock this situation for you—lead to a BREAK THROUGH?
- Whom do you admire?
- How would that person deal with this situation?
- What is your heart telling you?
- What is your head telling you?
- How can you utilize your strengths to determine the best course of action to take?
- Where do those aspects of your personality discussed above factor into your decision at this point?

Way Forward

In this final section, you will put together an action plan that will advance you toward your goal. This is where you state how you're going to put everything you've talked about into practice. Think about your goal above. What actions will you take to lead you one step closer to achieving that goal? What will lead you one step closer to realizing each component you've identified as important to you?

Action

- What will be the first step you take in moving toward your goal?
- How do you think this first step will help move you toward the following step?
- How do you think this will move you toward your end goal?

List three (small) steps that will advance you toward your goal:

Step One: _____

Step Two: _____

Step Three: _____

Identify one specific habit that you will change or implement in your life from now on:

One Habit: _____

Obstacles & Success

- What obstacle might prevent you from taking this action and achieving your goal?
- How will you overcome that obstacle?
- How can you measure your progress and success?
- How will you know you have succeeded?
- What *will* happen if you achieve your goal?
- What will *not* (continue to) happen if you achieve your goal?
- How committed are you to the action(s) you have identified?

[1] Adapted from Christian van Nieuwerburgh, *An Introduction to Coaching Skills: A Practical Guide* (Sage, 2013).
[2] Taken from Wheel of Life (http://lasso.okstate.edu/resourcelist).
[3] Adapted from *StrengthsQuest™* (Gallup, 2016).
[4] Adapted from Myers-Briggs Personality Test.
[5] Adapted from DISC Personality Model.
[6] Taken from *StrengthsQuest™ Activity Workbook* (Gallup, 2008), p. 2.