



## Coaching Tools For New Clients: Why They're So Important & Which Ones To Use

By [Emma-Louise Elsey](#)

Once a client has committed to coaching, they often have nothing to show for their courageous self-investment. This is one of the many challenges of the helping professions -- that much of the work we do is 'intangible' or hard to quantify.

So, when you send professional-looking assessments and coaching tools to your client, it's a great way of demonstrating what a wise investment your client has made in hiring you. And even better, it gives them something tangible to see and hold onto, while making you appear professional and organized.

Now, you can always simply send them a Welcome email with your assessments and coaching tools as attachments. But I thoroughly recommend sending your clients a Welcome Pack or binder in the (snail) mail which includes some printed out assessments or coaching tools. Get creative. A colourful folder with a hand-signed welcome letter, your branded materials and a small, fun welcome gift -- pens, post-its or a notebook is ideal. It's an excellent way to surprise and delight your client, after all, who doesn't like to receive gifts in the mail?

Sending some kind of specific welcome ensures you have something to discuss and work on with your clients in the early sessions (while they're getting used to how coaching works) AND helps you get to know your clients -- and therefore deliver value -- faster.

It also means that from the day they receive their coaching tools they're already being coached, because they're learning about themselves. It gets them into the mind-set of working on themselves in between sessions (when you're not around) and helps them learn self-reliance.

So, what assessments and coaching tools to use with a new client? Well, obviously it depends on the kind of coaching you're doing, but we all know that our lives, responsibilities and careers are inseparable. So, why not start by looking at how they live their lives currently and how they feel about that?

Here are the 5 coaching tools and assessments I recommend to begin with:

1. **The Wheel of Life.** Boring? Au contraire. The Wheel of Life may be old hat to us coaches, but it's still new to most clients. It's a powerful visual that assists with goal-setting, helping clients to see how their 'whole' life interacts and where they spend their time versus their 'real' priorities. I like to ask once it's complete, "So, looking at your Wheel of Life, is it a bumpy ride?"
2. A **Pondering Questions Sheet.** Send at LEAST one page of powerful questions to get them thinking. Questions like, "What do you do to relax?" (maybe they don't!), "What have you given up on in life?", "How do you best learn?" or, "What motivates you to go the extra mile?" As well as helping you get ideas on how best to coach them, it gets them used to asking themselves the bigger, deeper questions in life.
3. An Initial **Coaching Goals Sheet** (where they tell you what they want to achieve from the coaching). Apart from being helpful to know what they're looking to achieve, how they complete this hints at areas they may need coaching around. For example, if the sheet is blank or very brief they probably need more hand-holding and personal 'discovery' work. If the sheet is detailed and thorough they may need help with limiting beliefs/behaviours or getting excited about their goals. And if the sheet is chock full of goals and ideas they may need help with slowing down, time management or even self-care.
4. A **Life Map.** I LOVE this simple coaching tool that gives a quick overview of the ups and downs in their life as THEY see it. They draw a timeline from left to right and put in peaks (positive impact) and troughs (negative impact) with a 'blip' size that corresponds to the impact of the event. They annotate each 'blip' and this gives you a very quick visual of their life lows and highlights. Help them explore their helicopter life view and gain valuable insights into their sensitivities, where limiting beliefs and fears may come from, what inspires and motivates them and more!
5. Finally, I thoroughly recommend **The Rocking Chair Life Vision Exercise.** Your client imagines themselves at 90, happy, healthy in their rocking chair -- and looking back over what they've achieved in life, what they're proud of. It's a deceptively simple exercise and a great leveller! Almost everyone sees themselves surrounded by family and friends with a cute house in the country somewhere, still fit, healthy and active. The exercise results differ around the specific things people achieve with their lives -- very handy for what I call 'reverse goal-setting'. It helps our clients understand their goals in the context of their lives, so that as they set goals NOW for the future they can ensure these goals align with their overall "Life Vision". And you, as coach, get a glimpse into what motivates them and what they really want from life.

There are many more assessments and coaching tools you could use. You may want to create or buy something specific to your niche - a food diary template, resume template, visualization or self-care questionnaire.

But the key thing is for the tools to be professionally presented and branded with your logo and contact details. That way you're reminding them of your relationship with them and if they share them with anyone else -- you get free marketing!

Longer term, using assessments and coaching tools as part of your coaching relationship helps your clients build a physical record of work you've done together, demonstrating concrete value from coaching and helping clients see their learnings and progression. It's a bit like looking back over an old journal and seeing how far you've come!

So, enjoy bringing more of this dimension to your coaching practice. Clients who seek coaching want to find out more about themselves -- help them do that with coaching tools!

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If you go to [The Coaching Tools Company.com](http://TheCoachingToolsCompany.com) you'll find a [Free Resources page](#) - with a complimentary Wheel of Life, Coach Question Sheets to get clients unstuck and set extraordinary goals as well as useful coaching links, recommended coach reading and more. My all-time favourite tool "Troll Travels - Who am I?" is a gift with sign-up to the strictly monthly ezine. I have had amazing results with this powerful exercise - but I recommend you try it on yourself first to get the insights to share with your clients.

Many of the tools mentioned in this article are available in the [Coaching Tools Catalogue](#) - along with lots of other assessments and coaching exercises that may inspire you. PLEASE NOTE: All the coaching tools are available in Microsoft Word specifically so you can customise and brand them with your own logo! Enjoy.