

Items Sent to Coaching Client

Client:	Date of First Mailing:
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Item Sent	Date Sent	Notes
Welcome Packet		
Welcome Letter		
About Coaching		
Who Am I as Your Coach		
WBYW Client Profile		
Invoice		
Credit Card Payment Form		
How Do You Want to Be Coached?		
Clean Sweep		
What Am I Tolerating		
10 Goals to Reach in 180 Days		
Coaching Call Prep Form (2)		
Post-Call Recap Form (2)		
Business Cards		
Brochure		
Time Chart		
Attachment Index		
Spending/Debt Questionnaire		
Challenges Inventory		
Coachability Index		
Human Conditions List		
PCSI		



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Item Sent	Date Sent	Notes
Modalities Inventory (TBD yet)		
28-day Plan Worksheet (TBD yet)		
Goal Action Plan Worksheet (TBD yet)		
Financial Action Plan Worksheet (TBD yet)		
Motivational Gift Card		
Top Ten List		
Personal Mission Statement Certificate		
Poem on Pretty Paper Saying on Pretty Paper		
Birthday Card		
Anniversary Card		
Holiday Greeting Card		
Thinking of You Card		
Congratulations Card		
Postcard		
Referral Request Card or Letter		
Gift Certificate		



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