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Financial Advisory Firm for the Chief Operating Officer

Coaching Fact Sheet

How do I know if coaching is right for me?

Do you feel that currently you aren't reaching your potential and feeling fulfilled? Is there a gap of where you are now to where you want to be? Do you sometimes feel you don't have the skills, resources or confidence to get something complete? Do you feel stuck and put off making decisions or fail to stick to those decisions you have made? Are you ready to entertain new and fresh ideas? Are you willing to be accountable for what you desire?

If you answer yes to any of these questions then coaching can most definitely support you to be the best that you can be.

What is coaching?

Coaching is a tool that is used to empower individuals and help them reach their goals; it is a structured conversation between the Coach and the Client. During a coaching session as your coach, I will walk by your side to help you to reach your ultimate goal and aspirations. I will listen to you, ask questions, find out what your challenges are and inspire you to reach that end goal. You will be encouraged to make decisions and take responsibility for these decisions.

What is my style of coaching?

I am what is generally known as a 'hybrid' coach. I combine coaching skills with elements of mentoring given my experience in, and knowledge of, financial services. This allows you to build the skills and competence you need to further your career but also allows you to gain the benefit of my experience in the industry. I believe this combination allows me to be of best use to you as my client.

How does coaching work?

Different coaches use different models to structure their sessions. As your coach, I will be asking you questions, listening to your responses, challenging you whilst all the time remaining non-judgemental regarding the details. When I leverage my mentoring skills, I will be offering you my insights based on my experience and expertise to help 'fast track' you to the answers.

What will happen during a coaching session?

Coaching is predominantly carried out over Zoom or face to face. All arrangements are pre-agreed between you and I.

In order to maximise our time together and for you to get the most out of the sessions, I generally follow the below 6-point framework although we will adapt the framework according to your needs and the requirements for each session.

1. Review the previous session and the actions that you completed
2. Set the goal for that session
3. Consider where you are at the present moment with this goal
4. Consider your options in meeting this goal
5. Agree on some actions
6. Summarise the session before completing the session.

Each session will be for 60 minutes. I will manage the timing of the session and ensure you gain full value from the session.



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Who else will know what has been said?

A coaching session is completely confidential. I agree and comply to the Coaching Code of Conduct and only in extreme circumstances will this confidence be breached. This includes the intent to cause harm to yourself or others or criminal acts.

What do I need from you during a session?

To make sure that your time is best spent with me, you are expected to come to the session fully prepared and with a goal or aspiration in mind that you would like to work towards. Preparation is very important for the coaching session so you are encouraged to spend 15 minutes prior to the session taking yourself to an environment where you will not be disturbed. You will also need to ensure that you have a pen and paper to hand and any other items that you may think will be useful such as a diary or journal.

I want to start coaching now. What do I do?

You just need to let me know that you wish to proceed via email and I, or the company I am affiliated with, will send details through regarding the terms and conditions and an invoice. I will also send you a short set of questions which will help us start us talking about you and your aspirations.

Contact Cressida here:

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