Mentoring with Dave Phillips - *Trust the Process*

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Whole Life Mentoring
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Progressive Steps	Description of Steps	Why do we take this step?	How long does it take?
Step 1 - Evaluation - Intake Process	1. Complete and Review Welcome Letter and Clean Sweep	The Welcome letter explains the mentoring process and ask questions about goals, tolerations and other important considerations	* **1-2 hours** to complete the document and * **2-4 hours** to review with Dave Phillips
	2. Complete Birkman Interpretation	To understand natural behavioural patterns that will always govern behaviour and deliver the highest satisfaction.	* 45 minutes to complete the questionnaire. * **4-6 hours** for an advanced interpretation
	3. Complete Progress Chart	To get clear on the items you want to work on and have a way of measuring and tracking	This is completed as we go through the Welcome documents
Step 2 - Planning	4. Prioritize Progress Chart Items	To decide how much time we want to spend on each item in each call and how much energy you have for each item in your life.	**1 hour**
Step 3 Engagement	5. Engagement - Often there are Parallel Paths - I'll provide a sample below of how this often progresses	Now you have decided what is REALLY important to you and it's time to take the right action on the right things at the right time.	Everyone will work at a different pace at this stage depending on the issues at hand. A very common process looks something like the following but remember it's different for everyone: **Intake Process - Steps 1, 2 & 3** Clients often book a 4-6 hour session (quick start up) on the phone or in person to get through the intake process and right to Engagement **Engagement - Step 3** Often the client preference (after a quick start up) is to book 1 session every week or two. The purpose, Mission and Vision process often takes 2-4 months while also working on other pressing issues. This depends on the time commitment you are willing to make.
	Purpose Mission Vision - Self Care - Physical Fitness - Family engagement - Business Issues	Often there are parallel paths that need to be followed to deal with pressing current issues that must be addressed mixed with a long term view. The long term view is often addressed by answering the questions of Life Purpose, Mission and Vision in cooperation with the behavioural preferences that are not likely to change. These deeper personal patterns of Usual Behaviour, Needs and Interests are found in Birkman and provide invaluable guidance in this process.	
Step 4 - Integration	**Complete Life Flow Chart**	With a clear Purpose, Mission and Vision Statement you can now integrate and activate this into your life using the Life Flow Process. PMV is lived out through proper identification of Primary Roles, Goals and then Tasks (in that order)	Developing a personal Life Flow Chart will give you a look at your whole life on one large sheet of paper. This make it far simpler to prioritize the important pieces and get accountability and monitor progress. **(3-6 sessions).**
Step 5 - Process Conclusion	**Better Choices -Increased life satisfaction**	This is where you will engage the now tools you now have to make better choices to live a life with much more satisfaction.	Often clients choose to do on-going work that may include one session every Month, Quarter or Year to do a "Check Up".