

## Pre-Retirement Coaching Sample Framework

Curious about how coaching can help late career professionals? Here is an example of how coaching targets key objectives:

<b>Key coaching objectives</b>  <i>What you want out of coaching</i>	<b>Coaching activities</b>  <i>Things we'll work on together to help you get what you want</i>	<b>Added value from coaching</b>  <i>Other potential benefits</i>
<ul style="list-style-type: none"> <li>▪ Figure out what to do with your time once you leave work.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Define your priorities, interests, and preferences.</li> <li>▪ Identify what truly fulfills you at work and look for ways to replace those sources of satisfaction.</li> <li>▪ Craft a plan to test your options.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discover rewarding new pursuits.</li> <li>▪ Avoid feeling bored or aimless.</li> <li>▪ Decline invitations and commitments that aren't a good fit.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Avoid feeling diminished or lost without your work identity.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Take stock of your values, accomplishments, and strengths.</li> <li>▪ Make sure that core aspects of your identity find an outlet in your next chapter.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Your sense of purpose and values will be expressed through your actions.</li> <li>▪ Feel that your friendships and routines are personally rewarding.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Execute a seamless transition while continuing to make a professional contribution.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Strategize how and when to leave your role with minimum disruption to you, your clients, and your firm.</li> <li>▪ Formulate an off-ramp that respects your priorities and promotes future opportunities.</li> <li>▪ Identify ways to leave a lasting impression and preserve your reputation.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Feel more confident setting a definitive date to retire.</li> <li>▪ Help clients, colleagues, and other stakeholders adjust to your departure.</li> </ul>