

# THE *new* PHYSICIAN WAY: *Executive*

*One of the most impactful investments a  
physician leader can make in themselves.*

## Annual Guide (v 2.0)



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# Welcome to The New Physician Way

## Setting Intentions and Tracking Your Progress.

When you look across the landscape of healthcare, one thing becomes clear: Some leaders are more successful than others. These leaders are more focused, energetic, enthusiastic, and confident. Many factors contribute to this difference, but a key reason for the loss of energy and momentum in life is the absence of authentic goal setting and achievement.

Without deeply meaningful goals, people lose their sense of direction, confidence, and desire to develop new capabilities. They start to feel stagnant or even pulled backward in life, with their past looming larger than their future. Instead of being excited about what lies ahead, they become nostalgic for the lost magic of their youth.

## The Principles of Personal Compound Interest.

For those who consistently set, nurture, and achieve goals, life becomes more exciting as they age. They experience a sense of momentum, acceleration, increased progress, and growing confidence and capability. This happens because they understand a secret that non-goal setters don't: Life itself operates on the principle of compound interest. The more you invest in visualizing, committing to, and working toward a bigger future, the larger that future naturally becomes.

Compound interest, as it relates to money, is just one example of a much larger universal truth: Life functions in the same way that accounting impacts investments and returns. Those who invest in their personal and professional futures reap significant rewards, while those who do not see little in return.

## Being Extraordinary for an Entire Lifetime.

Every person has the potential to become extraordinary, and this quality can continue to grow throughout a lifetime. You possess unique talents and a distinct vision for your life. The extraordinary power of goal-tracking lies in visualizing your future, writing it down in specific ways (your writing hand is directly connected to your brain), setting deadlines (which tell your brain when you want to achieve something, leading to increased focus and motivation), and tracking your progress in meaningful ways.

Are you up for this?

**The information in the guide includes all the instructions and details you'll need to get started.**

I'm really looking forward to connecting with you!

Warmly,



*"Commit to the process and you'll be amazed at what's possible."*

*- Chief Medical Officer (California)*

# What is The New Physician Way?

## The Mission

This will be the most meaningful investment of time you make in yourself and your people this year. Together, we'll coach you and others through big, "impossible" changes.

## The Conventional vs The New Way

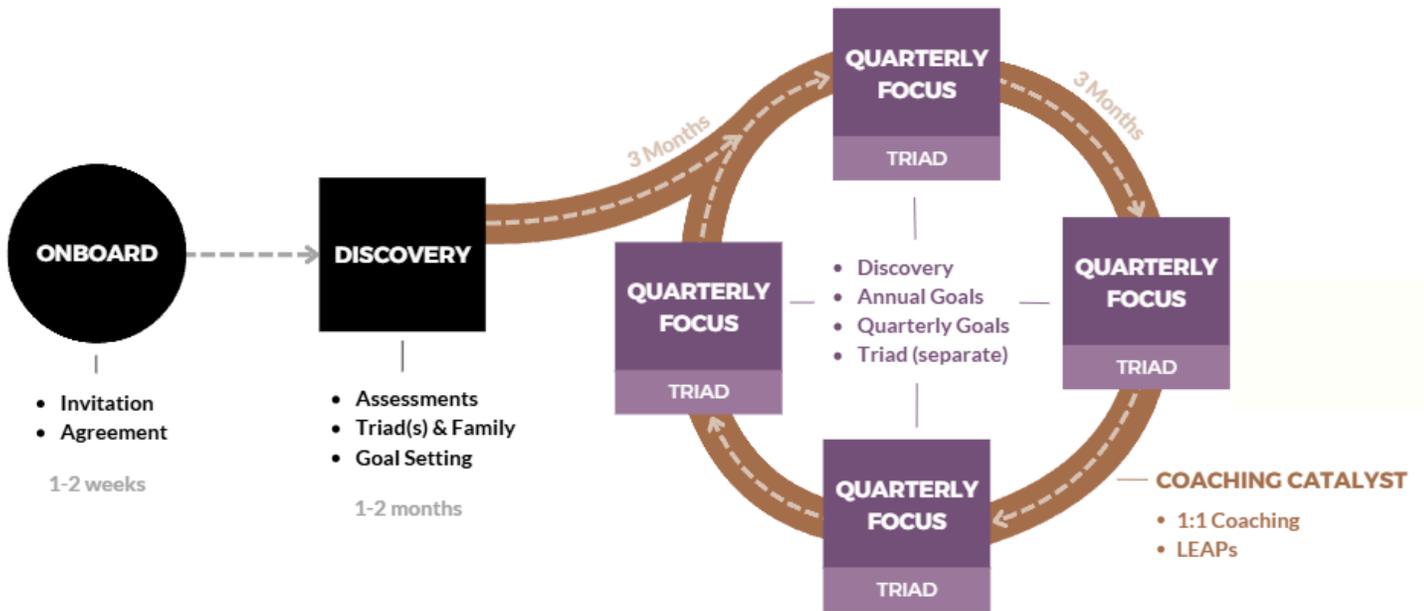
Here's what it can look and sounds like to shift gears and live in a new way:

	 <u>The Conventional Physician Way</u>	 <u>The New Physician Way</u>
Overview	Many leaders operate this way – relying on hierarchical authority to improve the status quo over a longer-period of time through familiar strategies and conventional efforts. This is a steady and predictable progression. Embracing this approach is like choosing a well-trodden path that offers incremental growth with minimal disruption to the existing order of things. There's nothing wrong with this way.	These leaders envision a future that's <i>tenfold</i> better than today – and let that 'impossible' vision dictate their present actions. They consistently take bold leaps aligned with a clearly envisioned future, leading to exponential growth in meaningful areas. They challenge the status quo. Interestingly, with this approach, results aren't the primary goal; they're the natural outcome of radically reimagining life's possibilities and aligning that with our roles and actions.
Goals	Modest improvements	Bold, transformational, "impossible" goals
Communication	Restrained or overly authoritative	Inspires a shared commitment to transformation
Action	Incremental reactions focused on refinement	Rapid, meaningful "LEAPS" that drive positive change
Patient Care	Extreme dedication at the expense of well-being	Integrated commitments to patient care, well-being, family...
Operates From	Past experiences and present realities	Future possibilities and solutions
Use of Resources	Efficient use of existing resources	Creative use of resources, seeks new avenues
Leadership Style	Authoritative, focused on control	Influential, focused on growing & empowering others
Relationship with Administration	Transactional and mostly isolated	Collaborates to uncover strategic alignment & integration
Adaptability	Resists change	Embraces change as opportunity

# A Human Operating System

This simple framework supports purpose-driven leaders to coach themselves and others through big “impossible” changes; in seasonal, 90-day rhythms. It combines the best elements of coaching, human-development and change-management theory; and eliminates the common distractions that keep high-performing physicians from making meaningful progress on what matters most to them.

The New Physician Way *fre*es us to set ambitious goals with clear ‘whys’ – to find and leverage our ‘whos’ – and to let go of beliefs and assumptions that hold us back.



**The all-in time commitment is ~1 hour / week.**

Process	Purpose	Timing	Tasks
<b>ONBOARD</b>	Set yourself up to maximize the return on your investment of time and energy	1-2 weeks	<input type="checkbox"/> 1:1 Welcome Call <input type="checkbox"/> Schedule Rest of Calls
<b>DISCOVERY</b>	Synthesize qualitative & quantitative data to set meaningful & measurable goals	1-2 months	<input type="checkbox"/> Debrief Assessments <input type="checkbox"/> Initial Triad Call(s) <input type="checkbox"/> Initial Goal Setting Call
<b>COACHING CATALYST</b>	Grow professionally and personally with guided reflection, clarity, action and accountability	Bi-weekly	<input type="checkbox"/> 1:1 Coaching Calls <input type="checkbox"/> Pre-Call Worksheets
<b>QUARTERLY FOCUS</b>	Recalibrate your long-term vision and tighten it's alignment to your daily life	Quarterly	<input type="checkbox"/> Quarterly Focus Call <input type="checkbox"/> Triad Call (separate)

# Who's Involved?

We'll fill this in during your Welcome Call

Role		Name
<b>Coachee</b>	<ul style="list-style-type: none"> <li>❖ Actively participate in the process of taking new actions and developing new skills to achieve breakthrough results</li> </ul>	_____
<b>Executive Sponsor</b> <i>(For organizations)</i>	<ul style="list-style-type: none"> <li>❖ If an organization is sponsoring a coaching engagement, the Executive Sponsor serves as the Internal champion with responsibility for the engagement's beginning and end, as well as organizational hurdles</li> <li>❖ Meet with coach monthly to provide feedback and ensure coaching aligned with organizations needs and opportunities</li> <li>❖ Coach reports coachee's level of engagement, while keeping the details of the coaching conversations 100% confidential</li> </ul>	_____
<b>Triad Partner(s)</b>	<ul style="list-style-type: none"> <li>❖ Give feedback to coachee at beginning &amp; middle of engagement</li> <li>❖ Acknowledge changes they've seen in coachee</li> <li>❖ Typically coachees manager, especially if coaching is sponsored</li> </ul>	_____ _____ _____
<b>Family</b>	<ul style="list-style-type: none"> <li>❖ A member of two of the coachee's family are invited to participate in the Discovery process, to ensure a well-rounded, "whole-person" coaching experience and result</li> </ul>	_____ _____

# What is Coaching?

“The Only Thing That Is Constant Is Change” —Heraclitus

## The Process

**Coaching is a supportive and action-oriented process driven by outcomes.**

Coaching is the process of drawing on strengths, questioning assumptions, and aligning values with purpose, to maximize personal and professional potential. It helps people dream of a better possibility for their life, then supports them to achieve it through action.

**Coaching drives transformation by providing a framework for positive intentional change.**

Coaching facilitates positive intentional change, shown as the Intentional Change Model, below.

Throughout the coaching experience, clients (or “partners”) develop relationships and neural pathways to support this trend in positive intentional change after the experience is complete.

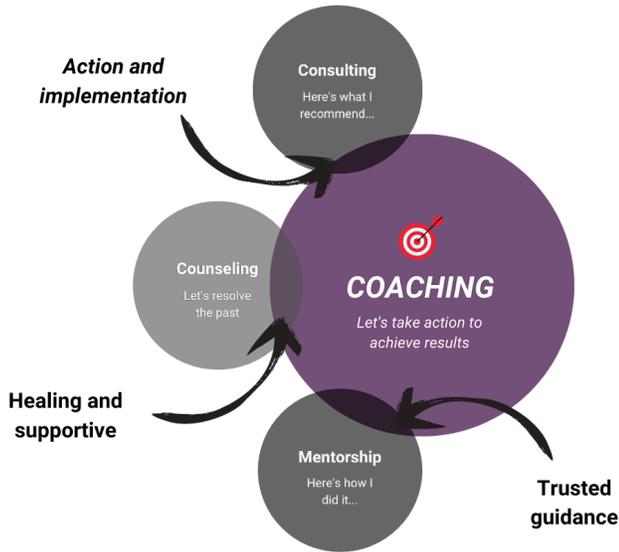
### The INTENTIONAL CHANGE MODEL



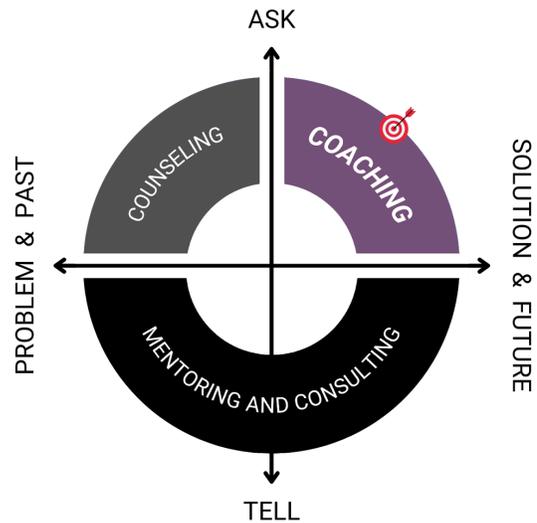
(Adapted from Robert Boyartzis' Intentional Change Model)

# Coaching, Consulting, Counseling and Mentorship

We can understand a coach's role and responsibility by comparing to other types of supportive relationships:



A coach's primary focus is to strengthen a coachee's wisdom, thought process and actions



Coaching is primarily forward-looking and solution-oriented – driven by the coachee's agenda

## COACHING

**"A supportive and non-judgmental environment is created in which to inquire, challenge and stimulate critical thinking and new ways of being, thinking and activating – often resulting in new behaviors applicable to the client's whole life."** [\[Source\]](#)

- ★ Create awareness to unlocks insights
- ★ Facilitate learning through actions and "experiments"
- ★ Support the clarification of compelling goals, solutions and next steps
- ★ Offer relevant tools and objective observations
- ★ An accountability partner in a non-political environment

## COUNSELING

"The counselor's focus is on addressing a personal issue with the client, often related to emotions, attitude or behavior. **The emphasis is on applying principles of mental health and psychology** to address wellness, personal growth, behavioral change or emotional well-being." [\[Source\]](#)

- Directly address pain from the past
- Help with emotional dysfunction
- Focused on "fixing"

## MENTORSHIP

"The mentor's primary attention is on imparting wisdom to a less experienced individual by taking an active interest in their development. **A less experienced individual learns from someone who is literally and/or metaphorically older and wiser** and has worn the same shoes and traveled a similar path." [\[Source\]](#)

- Share past experiences
- Wise and trusted advisor
- Directly assist with networking

## CONSULTING

"A consultant's primary attention is on helping an individual achieve personal or organizational results through the application of their specific expertise where they **advise the client on the best course of action for achieving desired goals.**" [\[Source\]](#)

- Give expert advice
- Present defined solutions
- Perform tasks and work "for" client

# Technology Guide

This section provides understanding of how to best leverage technologies to get the most from your coaching experience.

## 1. Communication

You're probably familiar with email :)

Email is how you'll receive the majority of our communications. We'll send instructions for things to complete, links to PDF documents, and instructions to schedule your coaching calls.

We recommend saving any emails that come from us into a "Coaching" folder within your email platform, which can make it easier to recall any documents, instructions, etc.

Please send any questions you have for your coach or our team through email.

## 2. Scheduling

### 3 Ways to Schedule Calls

Scheduling can make or break a coaching engagement. To enhance the success of your coaching engagement, we offer three scheduling options for you to consider:

#### Do-It-Yourself (DIY)

We *only* recommended this if you are extremely confident in your ability to track and schedule calls yourself.

Utilize the one-click scheduling links sent via email to book your calls at your convenience. This method offers flexibility but requires a reliable personal system to avoid gaps in your growth.

#### Done-With-You (DWY)

We *highly recommended* this approach, since it's most conducive to achieving the results you desire.

Collaborate with our Operations Manager, who acts as your personal assistant for scheduling. Together, you will set up your call schedule during the Onboarding Call.

#### Done-For-You (DFW)

This option is *ideal* if you already have support for call scheduling.

If you have an assistant or admin who manages your scheduling, they can coordinate directly with our Operations Manager, so your calls will be scheduled according to your preferences for you.

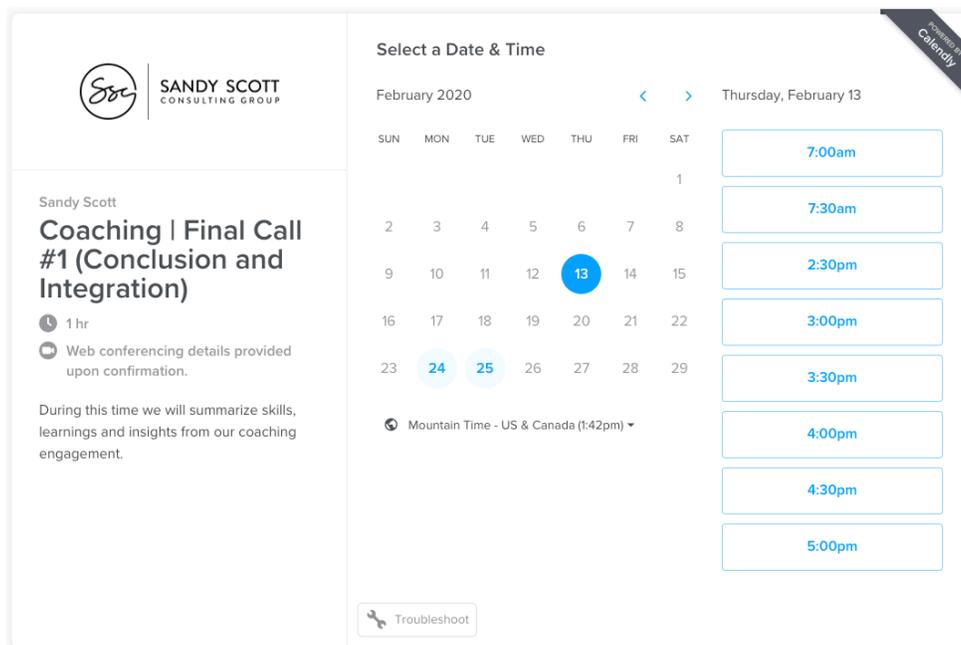
You'll discuss this more on your Onboarding Call – and we encourage you to use some time during your Onboarding Call to leverage our assistant to schedule your calls (DWY).

## 2. Scheduling (continued)

### How to Schedule a Call with Calendly (a one-click scheduling tool)

Calendly will make scheduling calls with Sandy easier. Instead of going back and forth to find a time that works for everyone, Calendly allows you to easily look at all the times Sandy is available for a call – then pick the one that works best for you.

1. Click on the Calendly link provided by our team
2. Click on the days highlighted in blue (e.g. February 13th, 24th and 25th)
3. Look at the available times for each day that appear to the right of the screen (e.g. 7am, 7:30a, etc.)
4. If necessary, click the blue arrows above “FRI” and “SAT” to switch months
5. When you’ve found a time that works for you:
  - a. Click the time and click “Confirm”
  - b. Enter your info and click “Schedule Event”



### How to Schedule a Call with multiple people (e.g. Feedback calls)

1. Follow steps 1-4 from above
2. When you’ve found a time that works for everyone:
  - a. Click the time and click “Confirm”
  - b. **Click “Add Guests”**
  - c. Enter your info and click “Schedule Event”

**Enter Details**

First Name \*

Last Name \*

Email \*

[Add Guests](#)

[Schedule Event](#)

## How to Schedule Multiple Calls

When you're scheduling all of your remaining coaching calls (after your Goal Setting call), simply repeat the steps above for each call that needs to be scheduled.

## How to Reschedule Calls

We understand schedules can be hectic and demanding, especially when patient lives are involved.

**If you need to cancel your appointment for non-emergent reasons, we respectfully request at least 72 hours notice.** While we try to accommodate rescheduling requests, any cancellation or rescheduling request made less than 72 hours in advance may result in forfeiting the scheduled session.

To reschedule:

1. Open the calendar appointment
2. Scroll to the bottom
3. Click the "Reschedule" link at the bottom of the event (see below)

Need to make changes to this event?  
 Cancel: <https://calendly.com/cancellations/BFILSOT6LSDJGHPF>  
 Reschedule: <https://calendly.com/reschedulings/BFILSOT6LSDJGHPF>

4. Pick a day and time that works better and click "Schedule Event"

## How to Reschedule a Call after the call was supposed to happen

After the scheduled call time has passed, it can no longer be rescheduled with the link in the calendar appointment. **Please use the original Calendly link that you used to schedule the event for the first time**, and simply schedule another call. You can also always reach out to us directly via email.

## 3. Attending Calls

Once your call is scheduled, you'll use Zoom Conferencing to talk to Sandy. It works similarly to WebEx, GoToMeeting, Skype and many of the other popular conferencing platforms out there.

### How to Dial In With a Computer

- Click the link in your calendar invitation
- Follow the prompts to enable the speaker and microphone on your computer or headphone

### How to Dial In With a Phone

- Call the number that's included in each calendar invitation
- When prompted, enter the Meeting ID that's included in each calendar invitation, followed by "#"

## What questions do you have?

Email us anytime: [support@sandyscottllc.com](mailto:support@sandyscottllc.com)

# Coaching Agreement

Congratulations on making the commitment to participate in executive coaching! We are here to support you in your leadership journey. This document outlines our commitments to each other and to the process.

## Your Commitment

You take responsibility for becoming the kind of leader you want to be, which means you agree to answer tough questions, examine your leadership habits and behaviors, listen to a variety of data points and feedback, try new ways of leading, create new goals, and trust the process. You take the lead in your own growth. You will have access to coaching preparation materials prior to each conversation.

## My Commitment

I am here to support your development and help you reach your goals. I will come to each session fully present and prepared. I commit to being honest and straightforward in asking questions and making requests.

## Confidentiality

As your coach, I value confidentiality in all of our relationships. My highest priority is creating a safe environment for you to be honest, straightforward, and authentic. You, however, can share any thoughts, insights or opinions with anyone you choose.

## Agreements and Acknowledgement

By signing this Coaching Agreement, you commit to:

- ❖ Be honest and participate fully.
- ❖ Recognize that sessions are a safe place to look at what you want and what it will take to make that happen.
- ❖ Be willing to explore and stretch yourself.
- ❖ Make a commitment to the action plans you create and do what you have agreed to do.
- ❖ Understand that our coaching relationship will have exactly the amount of power you give to it and agree to empower it to the best of your ability.

---

Client Name

Client Signature

Date

# Assessment 1 Debrief Notes

# Assessment 2 Debrief Notes

# Discovery Assessment

**What follows are the most powerful questions I know to help you transform your life and your work.**

Like most things in life. They will only work if you play full out, hide nothing and hold nothing back.

The future doesn't actually exist. But it can be created.

## **Are you in?**

Give yourself permission to explore new possibilities. If you're feeling stuck (*which most people do*) - try taking a walk, working out, enjoying a cocktail, sipping tea, or falling asleep thinking about a question, then waking up to write an idea on this page.

**There are no right answers and they are 100% confidential.**

## **Review Important Wins and Experiences**

What are the 5 most important wins/experiences in the *past 3 years*?

What are the 5 most important wins/experiences in the *past year*?

What are the 5 most important wins/experiences in the *past 90 days*?

## About The Future

**The Possible:** What is really important to you in the next 90 days? Imagine that it is 90 days in the future, and you've achieved significant progress with your goals. Envision it in specific detail; what do you see and feel?

**The Extraordinary:** If you were to look back a year from now and say "Physician Coaching was one of the best decisions in my life....." what has to have happened, personally and professionally, for you to feel thrilled with your progress?

**The Impossible:** What would you like to accomplish that looks impossible but if it were achieved would change everything? Another way to frame this question is to imagine that a miracle (of your choosing) happened overnight in your life. What would the miracle be, and what would your life look like tomorrow? Write a detailed response.

**Build Your "Who" Network:** You have access to a vast network of resources, talents, and connections. Consider your dreams and goals for the next year and/or quarter. Who in your current network could you engage to accelerate your progress? Who might offer the unique strengths or perspectives you need to overcome challenges or seize opportunities?

# Family Coaching

Family Coaching is not counseling.

Family coaching is focused on the future; specifically family coaching puts attention on outcomes or goals are decided on by the family members. Coaching focuses on results. Family members in a coaching conversation want to take action aligned with their hopes and dreams

Therapy is focused on dealing with the past; specifically unresolved issues that are impacting their ability to be happy together. Therapy focuses on healing. Families in therapy want to understand why they feel what they feel and come to terms with something that is hard to talk about.

The following is a recommendation to prepare for a 50-minute Family Coaching conversation:

Pre-work:

1. Complete the [5 Love Languages online quiz](#)
2. Share your results with your partner or family member.
3. Reflect on the following questions:
  - a. What new insight did you have about your own results?
  - b. What is one thing you want your partner to really know about you?
  - c. What did you learn about your partner?
  - d. What is one thing you could do differently that would truly delight them?

Family Coaching Conversation:

1. Check-In
2. Share Insights from 5 Love Languages Exercise
3. Guided Life Wheel Exercise
4. Debrief each person's Life Wheel
5. Coach each person to identify one area and brainstorm 10 action steps
6. Ask each person to commit to one action item
7. Next Steps & Completion

# ACHE Competency Model

<https://www.ache.org/-/media/ache/career-resource-center/cat-competencies-assessment-tool.pdf>

This tool is an optional resource to explore before your Goal-Setting call. Using models that provide specific language and a structured framework can be incredibly helpful in shaping meaningful goals. We encourage you to review this model and, if you find it compelling or inspiring, take a moment to highlight/circle the words that resonate with you. These selected words can serve as a foundation for setting goals that align with your aspirations and values.



## ACHE Competency Tool



- 1 Open your phone camera
- 2 Point it at the QR code
- 3 Tap the link to unlock content



# Triad Conversation Guide

## Why (This Matters More Than You Think)

Inviting others into your coaching journey isn't just about "feedback"—it's about getting new perspectives, testing ideas, and forging deeper connections. When you bring a trusted (or strategic) partner into the conversation, you tap into insights you could never uncover alone. Think of it like:

1. **Finding a hidden door in an old house:** Sometimes all it takes is the right knock to discover entire rooms of possibility you never knew existed.
2. **Using a GPS** — You get real-time recalculations instead of wandering in circles.
3. **Adding a new lens to your camera:** The same scene suddenly looks different—and so do your options.

Yes, it's vulnerable—and that's exactly why it works. By opening yourself to input (ideas, advice, or yes, even feedback), you make bigger leaps than your peers, in less time.

## How They Work

1. **Pick Your 2-3 Partner(s)**

*If Your Organization Is Paying:* Consider key stakeholders you want to connect with or influence. Inviting them to be part of your triad call can quickly strengthen strategic relationships. Vulnerability is a powerful trust-builder—this is a direct way to show openness and respect.

*If You're Paying:* Look in your department and across the organization for someone's perspective you value. Invite the people who matter most to your path (e.g. a new initiative, exploring a career shift). Consider an external leader (in another system) you'd love to connect with and learn from

2. **Schedule the Call**

*"If it's not on the calendar, it'll never happen—so make it real."*

Use our one-click Calendly link, or email our Operations Manager to lock in a time.

3. **Show Up**

*"Eighty percent of success is showing up."*

Show up ready to learn, share, and grow. Your coach will guide the conversation to be productive for all.

## HOW TO PREPARE

- List 2–3 Goals or Challenges** you want help with—these can be big ideas or specific pain points.
- Give Brief Context** to your triad partner(s) ahead of time. A short email or conversation is enough.
- Ask for Specifics on the call**—Concrete examples or suggestions make the biggest impact.
- Trust Your Coach**—I will manage the flow and facilitate the call so it's productive and energizing for all.
- Stay Open**—The best insights often come from uncomfortable truths or bold new ideas.

## Agenda (Two Options)

### Option 1: The Focused Agenda (Often Used in Organizational Settings)

- 5 min: Coach shares an overview of the coaching engagement with triad partner
- 5 min: Coachee shares 3 strengths, 2 opportunities (as a leader), and then ask their partner 1 question
- 5 min: Partner shares 3 strengths, 2 opportunities (as a leader), and ask their partner 1 question
- 15 min: Together, describe what would be different when the coachee is successful in making changes

### Option 2: The Open-Ended Agenda (Often Used in Personal/Private Coaching)

- 5 min: Coach Opens by clarifying the purpose and setting a safe and honest tone.
- 20 min: Main Discussion is having you share your specific goals, challenges, or ideas while your triad partner(s) provides direct feedback, suggestions, and experiences.
- 5 min: Wrap-Up by summarizing key insights and agreeing on next steps or experiments to try.

## Is it Worth It?

**"I Don't Like Criticism"** → Nobody does. This is *strategic input* to supercharge personal & professional growth.

**"I Don't Have Time"** → This process actually saves time by pinpointing your blind spots and opportunities faster than you can do alone.

**"It Feels Awkward"** → For sure. But that awkwardness fades, and what remains is a stronger, wiser you (and a triad partner who often learns *even more than you will* in the process).

## Bottom Line

Triad conversations are a proven way to fast-track your development. They might feel like a big leap, but that's exactly the point. By choosing the right partner, scheduling the call, and showing up ready to absorb and reflect, you'll unlock powerful insights—for you and the person giving feedback. Embrace the awkward. Embrace the growth. Your leadership (and your triad partner's) will never be the same.

## Sample Email Invitation

*Hi [Name] – I'm currently partnering with a professional coach and, as part of this process, I get to invite a few people I [respect/admire/etc] to join a brief (30-minute) Triad Call with me and my coach.*

*[Explain why you value their perspective: e.g., "You've seen me in action leading our team." / "I admire your expertise in X." / "I'd love your take on a challenge I'm facing."]*

*In terms of what to expect, my coach will guide the conversation, so it's focused, productive, and (hopefully!) fun. I'll share a few goals or ideas, and I'd value your honest input or suggestions, then we'll wrap up by capturing any insights and next steps.*

*To schedule the call, just click [Calendly Link for Triad Call] or let me know if you'd rather our Operations Manager find a time that fits your schedule. If we can't find a time, no problem at all—I totally understand if you're swamped. I appreciate your time and would love to learn from your perspective! Thank you, [Your Name]*

# Notes from Triad Conversation

Triad Partner: \_\_\_\_\_

Date: \_\_\_\_\_

# Quarterly Focus

After completing your Quarterly Reflective Writing, we're now poised to set your goals. This process is about thinking BIG, focusing on what you can influence, and committing to what seems impossible and matters to you. Your goals for the next 3 months should be ambitious, steering your life towards being more focused, fun, and fulfilling. By writing down your goals, you're telling yourself that you take your goals seriously. Consciously or unconsciously, you'll start to take the steps needed to make these goals a reality. And remember, without a compelling 'why,' goals are just words. **Know your purpose, and you'll find the fuel to achieve the impossible.**

We'll complete this together during your Quarterly Focus.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

## My Core Values, My Big Insights, and/or My Big Why

The non-negotiables that guide every decision and action.

*What is my Growth Path Forward?*

## My Assessment Results

The new behaviors you want to practice or driving purpose that makes your goals meaningful and unstoppable.

*What is my Growth Path Forward?*

## My Who Network

The key people who accelerate your success and help you achieve the impossible.

*What is my Growth Path Forward?*

# Quarterly Focus

Choose how you want to frame your past and learn from it. Let these insights shape your present and what's calling you. Define your future with bold actions that create momentum and bring you closer to your annual or "impossible" goals.

**Annual Goals:** *If a miracle happened this year what would it be? Describe the goals that are deeply meaningful to you and bring you closer to your purpose on this earth. Write them in ways that align with unique experiences your soul craves. What is truly significant to you and the impact you want to have?*

- 1.
- 2.
- 3.

## Past 90 days: Winning Experiences & Achievements

*Looking back, what was most surprising and inspiring?*

*What evidence are you seeing that you're leaping forward towards your goal?*

*Simplify and focus: Increase fulfillment and decrease stress by reflecting on bold actions you took.*

- 1.
- 2.
- 3.

## Right now: What's calling you?

*When you become deeply present and let go of fears, attend to the edges of who you are and follow the aliveness – where do you want to put your attention?*

*What do you want? What do you really want as it relates to your goals?*

- 1.
- 2.
- 3.

## Next 90 days: Taking big leaps

*Looking ahead, what new things are giving you the greatest sense of excitement?*

*Who are you becoming?*

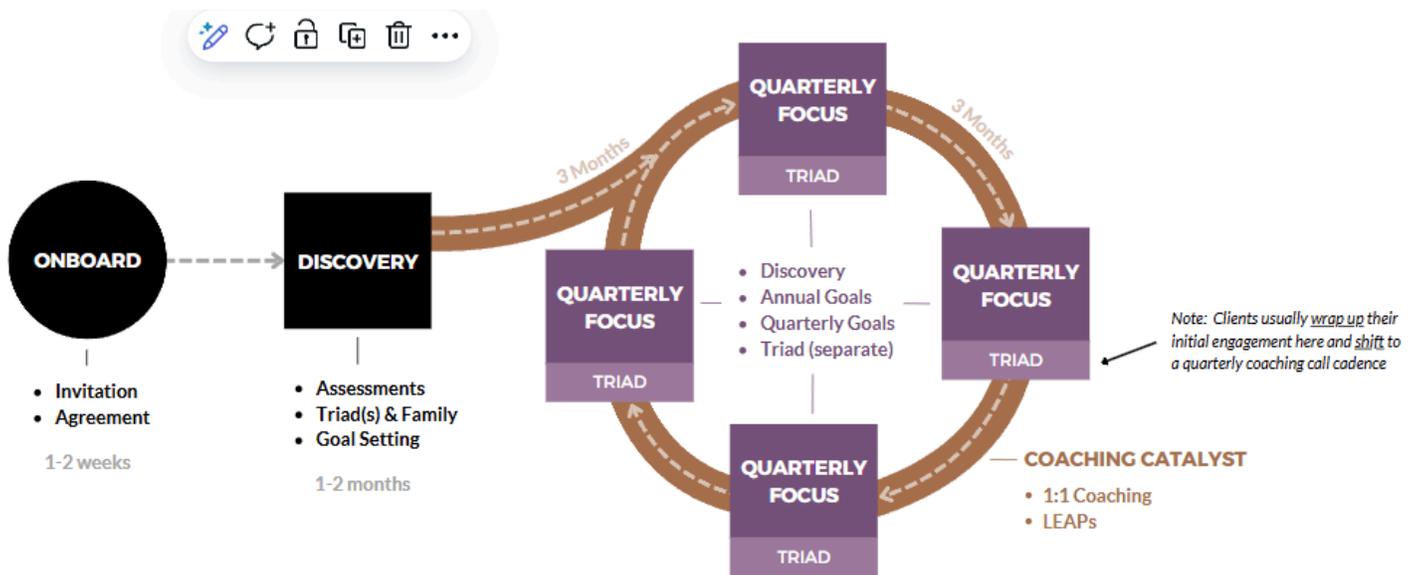
*If your future self gave you a message of one thing to stop today, what would that be?*

- 1.
- 2.
- 3.

# Notes

# THE *new* PHYSICIAN WAY

Quarter: \_\_\_\_\_





# Individual Coaching

Maximize the value of your coaching sessions by **completing (1), (2) and (3) before the call.**

Document key learnings and insights by **completing (4), (5) and (6) during and after the call.**

**REMINDER:** Send a photo of this completed page to our team

## 1 Personal Check-In (5 minutes)

How are you today, right now? What 3 words would describe you and your day?

## 2 Action Check-In (5 minutes)

This is a chance to **focus on progress, not perfection**. Slow down. Review your calendar and projects to filter for the ways you're growing. What **action or experiments** have you taken since our last conversation?

What was the **impact**?

How have you **learned and grown**?

What are you **discovering about yourself**?

## 3 Framing My Focus (5 minutes)

What do I want to focus on during my coaching conversation?

What is the growth opportunity for me?

#### 4 Notes from My Coaching Conversation (30 minutes)

#### 5 My Learnings (5 minutes)

What is the most important insight you got from today's coaching?

#### 6 My Actions (5 minutes)

What is the most valuable thing you can do right now to move your work forward?

What exactly will you do differently? When?

# We coach mission-driven clinicians to lead meaningful change in themselves and others —*regardless of circumstances.*

Stay ahead of the curve by partnering with a Top 1% Certified Coach



**750+ PHYSICIANS  
COACHED**

**30+ YEARS  
COACHING  
EXPERIENCE**

## Our clients describe their experience as transformative

"I have worked with Sandy in two different health systems. She has an incredible ability to connect with physicians and to break through their guarded skepticism to unlock their true passion for patient care, empathy, and leadership. The result is **a resilient physician leader that can shift the culture of the organization.**"



Chief Clinical Officer, Intermountain Health

"As a surgeon and leader, I was losing effectiveness, getting overwhelmed and couldn't figure out what to do differently. Through coaching, I began to better understand my team and developed the ability to **delegate and hold others accountable.** That gave me energy to start communicating our vision and work more strategically."



Chief of Surgery, California

"Sandy is an expert at coaching physicians. She influences the professional, personal, and emotional lives we have as doctors. As a physician who has been coached by Sandy--she **changed my life and the lives of my colleagues.**"



Chief Medical Officer, Colorado

"During my coaching... I set clearer expectations and guided my team to come up with a solution which they implemented. **Staffing, morale, and patient care have all improved.** I learned I don't need to fix things by myself."



Medical Director, Mississippi

"I learned to practice **delegation by setting goals and time lines to monitor progress.** This helps me not get so focused on the details that I forget the big picture."



Chief Medical Officer, Arizona

"With [Sandy], I developed a new understanding of how to be **deliberate and proactive in situations with conflict.** Through iterations of practicing specific skills, my approach has improved, and results are better."



Medical Director, Maine



**We're delighted to play a role in your future.**  
Send us a message to review our case studies.



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