

Client Policies and Procedures

Welcome!

Welcome to coaching as my client. I look forward to working together. There are a few guidelines that I expect clients to maintain in order for our relationship to work. If you have any questions, please call me.

- FEE** Clients pay me on time unless prior arrangements have been made. Payment may be made by check or credit card.
- PROCEDURE** My clients call on time. Come to the call with updates, progress and current challenges. Let me know what you want to work on, and be ready to be coached. **Make copies of the enclosed client prep form and fax or e-mail a completed form before each call. The agenda is client generated and coach supported.**
- CALLS** Our agreement includes a set amount of calls. If you or I are on vacation, we spend more time before you/I leave and after you/I return.
- CHANGES** My clients give me 24 hours notice if they have to cancel or reschedule a call. If you have an emergency, we will work around it. Otherwise, a missed call is not made up.
- EXTRA TIME** You may call between sessions if you need “spot coaching”, have a problem, or can’t wait to share a win with me. (You can also fax or e-mail me). I enjoy delivering this extra level of service. I do not bill for additional time of this type, but I ask that you please keep the extra calls to five or ten minutes. When you leave a message, let me know if you want a call back or if you are just sharing.
- PROBLEMS** I want you to be satisfied with our relationship. If I ever say or do something that upsets you or doesn’t feel right, please bring it up. I promise to do what is necessary to have you be satisfied.
- A MUST** It is necessary for the client to implement the coaching that is given to feel that coaching is a success. You have hired a coach to do things differently than you ever have before. If you choose to not use the coaching and keep doing what you have always done, you will get the results you have always gotten.

Life Coaching Agreement

To my client: Please review, adjust, sign where indicated, and return to me at the above address.

NAME _____

INITIAL TERM _____ MONTHS, FROM _____ THROUGH _____

FEE \$ _____ PER MONTH, \$ _____ FOR THE PROJECT

SESSION DAY _____ SESSION TIME _____

NUMBER OF SESSIONS PER MONTH _____

DURATION _____ (length of scheduled session)

REFERRED BY: _____

PROTOCOL:

1. CLIENT CALLS THE COACH AT THE SCHEDULED TIME.
2. CLIENT PAYS COACHING FEES IN ADVANCE
3. CLIENT PAYS FOR LONG-DISTANCE CHARGES, IF ANY.

1. As a client, I understand and agree that I am fully responsible for my well being during my coaching calls, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy and that professional referrals will be given if needed.
2. I understand that "life coaching" is a relationship I have with my coach that is designed to facilitate the creation/development of personal, professional or business goals and to develop and carry out a strategy/plan for achieving those goals.
3. I understand that life coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
4. I understand that life coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that life coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of therapy.
5. I promise that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with the life coaching relationship.
6. I understand that information will be held as confidential unless I state otherwise, in writing, except as required by law.
7. I request your permission to keep a confidential record of your name, phone number or email address in order to meet the requirements for coach credentialing by the International Coach Federation www.coachfederation.org. This information will be utilized strictly for the purpose of meeting these requirements and, following the credentialing process where two assessors will validate my list and subsequently destroy the two copies, only the master list will be maintained within secure files of the ICF. I agree to allow my coach to document the coaching hours with me for submission to the ICF for certification as a coach.
8. I understand that life coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual or other matters. I understand that all decisions in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my responsibility.

I have read and agree to the above.

Client Signature

Date: