

## 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.

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| <b>Fee</b> | Clients pay me on time unless prior arrangements have been made. Payment may be made by check or credit card. |
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| <b>Procedure</b> | 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. |
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| <b>Calls</b> | 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. |
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| <b>Changes</b> | 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. |
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| <b>Extra Time</b> | 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. |
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| <b>Problems</b> | 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. |
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| <b>A Must</b> | 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. |
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# 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](http://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



# Client Data Form

Date \_\_\_\_\_

Name \_\_\_\_\_

Occupation \_\_\_\_\_

Business Name \_\_\_\_\_

Preferred

Home Address \_\_\_\_\_

Business Address \_\_\_\_\_

Day Phone \_\_\_\_\_ Evening Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_ Fax Line \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Okay to leave messages everywhere? If not, explain: \_\_\_\_\_

Preferred means of communication \_\_\_\_\_

Date of Birth \_\_\_\_\_ Age \_\_\_\_\_

Other Significant Dates \_\_\_\_\_

Preferred Coaching Schedule on (day of week; time of day) \_\_\_\_\_

Names of important people in your life (spouse, partner, children, friends, etc.) \_\_\_\_\_

Emergency Contact \_\_\_\_\_

Other information you want me to know: (You may continue on back of page.)

\_\_\_\_\_

\_\_\_\_\_

How did you hear about my coaching services? \_\_\_\_\_



What influenced your decision to work with a coach? \_\_\_\_\_

Have you ever been coached? If so, please describe the experience. \_\_\_\_\_

Do you have specific goals for the coaching relationship? If not, what goals might you now create? \_\_\_\_\_

What are your significant commitments? \_\_\_\_\_

What would your perfect life look like? \_\_\_\_\_

What are your dreams? \_\_\_\_\_

What dreams have you given up on? \_\_\_\_\_

Where do you want to focus first? \_\_\_\_\_

Sample Welcome Packet \_\_\_\_\_

What parts of your life are working best now? \_\_\_\_\_

What parts of life are working least well? \_\_\_\_\_

What are your values? \_\_\_\_\_

What stops you from having the life you want to have? \_\_\_\_\_



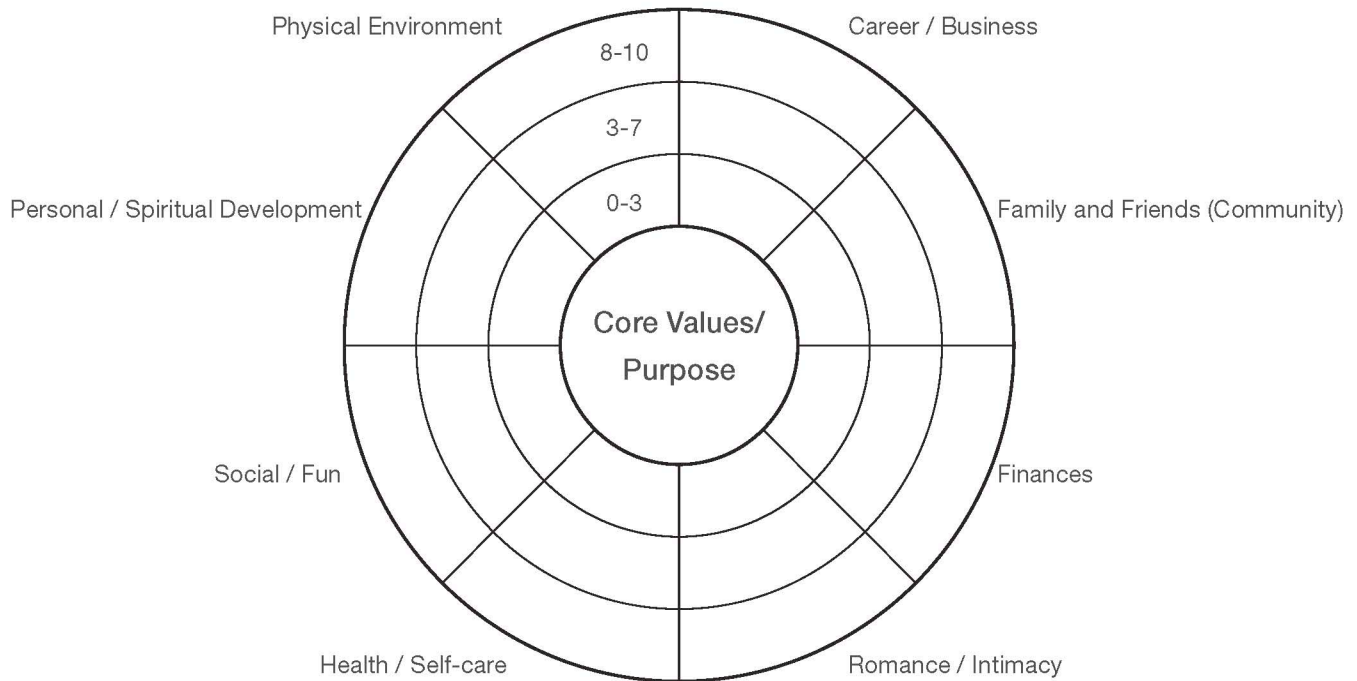
## The First Step: De-Cluttering

We put up with, accept, take on, and are dragged down by people and situations that we may have come to ignore in our lives rather than fix them. Now is the time to identify those things that drain your energy for positive activities. As you think of more items, add them to your list.

You may or may not choose to do anything about them right now, but just becoming aware of and articulating them will bring them to the forefront where you'll naturally start eliminating, fixing or resolving them.

| <b>ENERGY DRAINERS AT WORK</b> | <b>ENERGY DRAINERS AT HOME</b> |
|--------------------------------|--------------------------------|
| 1.                             | 1.                             |
| 2.                             | 2.                             |
| 3.                             | 3.                             |
| 4.                             | 4.                             |
| 5.                             | 5.                             |
| 6.                             | 6.                             |
| 7.                             | 7.                             |
| 8.                             | 8.                             |
| 9.                             | 9.                             |
| 10.                            | 10.                            |
| 11.                            | 11.                            |
| 12.                            | 12.                            |
| 13.                            | 13.                            |
| 14.                            | 14.                            |
| 15.                            | 15.                            |
| 16.                            | 16.                            |
| 17.                            | 17.                            |
| 18.                            | 18.                            |
| 19.                            | 19.                            |
| 20.                            | 20.                            |

## Life Balance Wheel (Coaching Mandala)



The hub represents your core values—each area interrelated in an ideal life.

Give yourself a score (1-10) and shade or color in the space accordingly.

Use this Coaching Mandala as a way to assess the level of life satisfaction in each area.

You may score it numerically to measure the improvement desired, or you may use it to have a coaching conversation about gaps between where you are now and where you would like to be.

# Template for Personal Vision Statement

I strongly believe that we are each the creator and director of our own life drama, able to create “on purpose” what our life will look like, feel like, and be like.

It is your opportunity and responsibility to write the script, be the producer and director, and to gather the other characters in your life drama. Some people live painful dramas or unfulfilling dramas, but if you are conscious and on purpose with what you want your life to be, it has a much greater chance of evolving into your vision.

So how does one begin designing one’s life? First of all you can begin to revisit and remember dreams and desires from your younger years. What drove you? What did you want to become? Who did you admire? Divide your life into thirds and ask yourself what accomplishments or happy events occurred in each third of your life? What values were represented? Are those values still present?

## Exercise: My personal lifestyle

Read through the following sentences and answer as if your life were exactly as you would like it to be. Let this be an accurate reflection of what you envision for your ideal life. After you have completed all these pieces of your Personal Vision, you can write a summary paragraph that encapsulates all your intentions, desires and values.

1. In my family life I am committed to \_\_\_\_\_ (spending time with, enjoying, teaching, working with, taking care of) my \_\_\_\_\_ (spouse, partner, friends, family and/or children).
2. For recreation and fun, I enjoy \_\_\_\_\_
3. My home environment will be \_\_\_\_\_ (nurturing, comfortable, a place for entertainment, on the water, spacious, have a home office, in the city, in the country, etc.)
4. My retirement home will be \_\_\_\_\_ (a cabin in the mountains, a seaside condo, a small restored Victorian home, a large, spacious home to accommodate visiting grandchildren and guests, a large motor home, a houseboat.
5. My hobbies, passions, interest are \_\_\_\_\_ (world travel, politics, reading, writing, sports, gardening, martial arts, etc.)
6. I will maintain (or regain) my health by \_\_\_\_\_ (exercising, eating healthy foods, lowering my stress, meditating, etc.)

*(This exercise was adapted from Shawn Mcnallis with Atticus of Orlando, used with permission)*

## Exercise: My professional life

1. I will concentrate my practice in the areas of \_\_\_\_\_ (fill in with niche or types of clients).
2. My office environment will be \_\_\_\_\_ (spacious, comfortable, a home office, efficient, well-organized, etc.)
3. My financial plans are to \_\_\_\_\_ (earn a minimum of \_\_\_\_\_ per year, save 20% of my income, leverage my investments to retire at age \_\_\_\_\_ with a yearly income of \_\_\_\_\_, allow for 4 vacations a year, buy a retirement home, etc.)
4. My business philosophy is one of \_\_\_\_\_ (integrity, leadership, dedication to my clients, providing superior coaching and modeling for my clients, being known as an expert in my specialty, etc.)





## Personal Vision Worksheet

Using the information you have gathered about yourself in the preceding exercises, write your personal Vision in paragraph form. You may do a rough draft and then polish it in the weeks to come.

In my personal life I am committed to \_\_\_\_\_

In my professional life I am committed to \_\_\_\_\_

## Goals

What goals, aspirations, desires, and intentions do you want to accomplish in the first six months of life coaching?

Business:

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Personal:

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What do you want to accomplish, change, or create in the first 30 days of life coaching?

Business:

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Personal:

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What I hope to gain from this coaching relationship:

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Other things I'd like my coach to know about me:

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# Session Preparation Form

DATE: \_\_\_\_\_

To get the most out of your coaching session it is best to spend several minutes preparing for it.

Please email or fax me a copy before your session.

WHAT I HAVE ACCOMPLISHED SINCE OUR LAST SESSION...MY WINS OR VICTORIES

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

WHAT I DIDN'T GET DONE, BUT WANT TO BE HELD ACCOUNTABLE FOR

- \_\_\_\_\_
- \_\_\_\_\_

CHALLENGES I AM FACING RIGHT NOW

- \_\_\_\_\_
- \_\_\_\_\_

WHAT I AM APPRECIATIVE OF OR GRATEFUL/THANKFUL FOR?

- \_\_\_\_\_
- \_\_\_\_\_

HOW DO I WANT TO USE MY COACH TODAY AND WHAT DO I WANT TO GET OUT OF THIS CALL?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

WHAT I COMMIT TO DOING BEFORE THE NEXT SESSION

- \_\_\_\_\_
- \_\_\_\_\_