



*another  
day  
in paradise*

# Coaching Agreement

Client Name: \_\_\_\_\_

This agreement, between \_\_\_\_\_,

and the above named client will begin on \_\_\_\_\_ and will continue as agreed upon by the client and the coach.

The fee for the initial meeting is \_\_\_\_\_. If paid in advance there is a 10% discount after the initial meeting. All payments will be made by credit/debit card, check or cash before or at the time of service. It is expected that you will keep track of sessions and payments in case there are any discrepancies in our records. Any unused sessions will be refunded if adequate notice is given. Any session not kept will be billed for. Please give at least a 24-hour notice of cancellation or you will be charged.

The services to be provided by the coach to the client are coaching or tele-coaching, as designed jointly with the client. Coaching, which is not advice, therapy, or counseling, may address specific personal projects, business success, or general conditions in the client's life or profession. A coach is a mentor, facilitator, and guide. A coach helps people see options and alternatives for becoming a more effective human being. Other coaching services include value clarification, brainstorming, identifying plans of action, examining modes of operating in life, asking clarifying questions, and making empowering requests. The client understands that the coaching relationship is not psychotherapy, psychological counseling, or any type of therapy, nor is it a substitute for these services. If either the coach or client believes that mental health counseling would be appropriate in helping the client reach desired objectives, a referral will be made. Either the coach or the client can make the request.

The coach promises the client that all information provided to the coach will be kept strictly confidential.

Throughout the working relationship the coach will engage in direct and personal conversation. The client can count on the coach to be honest and straightforward in asking questions and making requests. The client understands that personal power comes from personal accountability. The client agrees to do just that: have the coaching relationship be powerful. If the client believes the coaching relationship is not working as desired, the client will communicate and take action to return to the power of the coaching relationship.

Our signatures on this agreement indicate full understanding of and agreement with the information outlined above.

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

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

## Client Information

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

Phone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Sex:  Male  Female Date of Birth: \_\_\_\_\_

Please give me a 24-hour reminder of appointment by  phone or  e-mail (check one)

Employer: \_\_\_\_\_ Position: \_\_\_\_\_

How long have you worked at this job? \_\_\_\_\_

Highest level of education attained: \_\_\_\_\_

Primary Physician: \_\_\_\_\_ Phone: \_\_\_\_\_

List any significant health problems: \_\_\_\_\_

List medications you are presently taking and dosage: \_\_\_\_\_

Are you now, or have you ever been in therapy?  Yes  No

If yes, when? \_\_\_\_\_ Name of therapist: \_\_\_\_\_

Brief description of issues worked on: \_\_\_\_\_

Have you had coaching/consultation before?  Yes  No

If yes, when? \_\_\_\_\_ Name of coach/consultant: \_\_\_\_\_

Brief description of goals worked on: \_\_\_\_\_

Referred by: \_\_\_\_\_

Who can be contacted in case of emergency? \_\_\_\_\_

Phone: \_\_\_\_\_ Relationship to you: \_\_\_\_\_

## Financially Responsible Person's Information (if different from above):

Name: \_\_\_\_\_ Relationship to client: \_\_\_\_\_

Phone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

## Financial Agreement:

Generally coaching is done in 1-hour increments, once or twice per week; however, we will design a plan that is best for you.

## Discounts:

You may choose to pre-pay for a 10% discount. Even if you pre-pay, you are required to give 24 hours notice of cancellation or you will be charged for that session. Any unused pre-paid sessions will be refunded.

Payment is due in full prior to or at the time of each session.

## Method of Payment:

Check

Cash

Credit Card:  Visa  MasterCard Credit Card # \_\_\_\_\_ Exp. \_\_\_\_\_

## Confidentiality Statement:

All information shared in session is confidential except in circumstances governed by laws mandating that I report alleged harm to self or others, and in the case of child, handicapped person, or elder abuse.

## Venue:

I would like to utilize the following type(s) coaching. My coach has explained the pros and cons of each venue: (please initial)

\_\_\_\_\_ By telephone

\_\_\_\_\_ Face to face, office visit

## Statement of Understanding:

My coach has reviewed this client-coach agreement with me, and explained it to me so that I understand.

Client \_\_\_\_\_ Date \_\_\_\_\_

Coach \_\_\_\_\_ Date \_\_\_\_\_

Parent or Guardian \_\_\_\_\_ Date \_\_\_\_\_

# What Is Coaching?

## What Is a Personal Coach?

A personal coach is a trained professional who assists you in achieving your desired life changes and goals. The coaching relationship is a **powerful collaboration** between coach and client to promote personal and professional growth. Like an athletic or voice coach, a personal coach challenges you to live up to your potential and achieve your objectives. No serious athlete or singer would pursue success without a coach.

The coaching relationship is a **collaborative effort** that focuses on the changes you would like to make and growth you wish to achieve. Unlike therapy, which may delve into your past, the coaching relationship accepts you as you are today, and concentrates on your personal goals for the future.

## Why Does a Person Hire a Personal Coach?

The coaching relationship creates **momentum** through accountability and synergy. It is a tool that can be applied to almost any situation or goal. Examples of goals that can be achieved through coaching include:

- Improving order, balance and fulfillment in your life.
- Achieving less stress, less financial pressure.
- Addressing specific tasks, such as starting a new business, creating a daily workout or meditation routine, losing weight, reducing debt, etc.
- Earning more money and being more effective at work.
- Negotiating life transitions such as separation and divorce, job changes and retirement.

## What Is the Coaching Relationship Like?

The coaching relationship provides you with personalized focus, structure, advice and support. It increases your **motivation** through encouragement and by dealing with procrastination and self-defeating behavior. It provides **clarity** by working with your priorities, values, and goals. The relationship provides **non-judgmental support** through articulating your dreams and aspirations, highlighting your accomplishments and objectively evaluating your mistakes. It provides **accountability** through a weekly face-to-face session or telephone conference session, coupled with specific assignments and action plans.

## Coaching Over the Life Cycle

Life is a process. There are many transitions over the course of the life cycle. Managing these transitions successfully involve knowledge, resources and application of knowledge. Coaching helps the person make these transitions smoothly and deliberately. Change is normal and natural and part of the growth process.

## Area of Life Transitions/Adjustment

- Marriage, intimate relationship
- Divorce and separation
- Loss of Job/ Job change/ Retirement/ Job related stress
- Catastrophic Illness
- Death

- Performance coaching
  - Personal care
  - Couples—relationship enrichment
  - Lifestyle issues
- Spiritual crisis
- Value clarification
- “Mid-Life Crisis”

## Six Principles of Coaching

1. The client sets the agenda.
2. The client and the coach are equals; it is not a doctor/patient relationship.
3. The client is resourceful. He/She has not come to be “fixed” but has the ability to resolve his/her own issues with clear, specific guidance.
4. The coach’s role is to assist the client in discovering his or her own resources and skills. It is not to simply give advice.
5. Coaching addresses the whole person—past, present and future.
6. Coaching is about positive, constructive change. Coaching is not psychotherapy and is not intended to be mental health counseling. It may be therapeutic, but is not intended as therapy

## Life Adjustment Center

Life Adjustment Coaching assumes that life is a process that goes through many transitions. These transitions are normal and there are certain skills and resources that are available to help navigate these transitions. The life adjustment center works from 12 spiritual principles of wellness. This model allows people to assess their lives and provides tools and resources to make healthy and constructive life adjustments. Life adjustment coaching is not therapy thus there is no mental illness diagnosis. It is a **growth model** that sees transitions as normal and potentially energizing parts of the overall life experience. “Spiritual growth is becoming attractive to individuals from every culture, race, sex, economic status, and religion” says Gary Zuakov. Dwayne Dyer says, “There is a spiritual solution to every problem.”

## Transform Your Life and Get the Most Benefit from Coaching

I will ask a lot of you. This could be one of the reasons you invited me to work with you. (I only work with people by invitation.) Being stretched and challenged is one of the hallmarks of coaching. My objective is not to overwhelm or burden you. I will, however, ask you to do more and be more than you may have done and been in the past. I will invite you to accept full accountability for your life.

## Areas of Preparation

- Get ready to set objectives that really matter to you.
- Be ready to act and take action now on your objectives.
- Gear up to set objectives that will cause you to stretch yet not break.
- Be willing to experiment with fresh approaches.
- Be open to changing the parts of your life that need changing.
- Be willing to weed out the things that do no work for you anymore.
- Be ready to have FUN.

- Enjoy using the gifts you have to enjoy life NOW.
- Ready yourself to play a bigger game, the one you know you are capable of.
- Open yourself up to new possibilities and new ways of thinking.
- Prepare yourself for good honest talk and creative solutions for growth.

## My Style of Coaching:

### **I Give it to You Straight, 100% of the Time**

If I am sure of the situation—I'll make specific suggestions about how to handle a problem. If I am not sure, I'll say so. My advice here is to run it through your own filters, take the best of what I share and leave the rest.

### **I Catch Incongruent Conversation and Activity**

If I catch something incongruent or sense you are not feeling so great about something, I will not be confrontational, but I will ask you about it. For example, if you tell me that something is important to you, yet your attitude or actions don't back up your words (you are not acting on it, or you don't sound convincing), I will mention this. My objective is to shed some light on things and help us both see a situation more clearly.

### **I Believe and Expect You Are Taking Action**

I like to think that our coaching will expand your capacity to obtain results. I usually ask each client to come up with 2–3 objectives and actions to accomplish between visits or calls. You will also come up with action steps. If it is too much, just say so.

### **I Ask You to Use Coaching Rather than Depend Upon It**

As your coach, I am a resource for you to use to your best advantage: I have stores of ideas, patience, and strength for you. I may share principles from time to time that could increase chances for success and add quality to your life. I ask that you use our partnership to the fullest rather than need it or depend on it.

## Principles of Healing and Transformation

1. Accept that you are accountable for your life. Your life is one that you have created both consciously and unconsciously. It should represent your conscious passions, desires and interests.
2. Know your uniqueness and honor it. Socrates said, "A life unexamined is not worth living." Become aware of your needs and wants at all levels. Acknowledge your gifts and strengths. Be aware of what nurtures you physically, emotionally, psychologically and spiritually.
3. Learn the spiritual art of forgiveness of self and others. Practice the art of non-attachment, the art of letting go. Learn to let go of the so-called dark emotions of hate, envy, jealousy, resentment, guilt, and anger.
4. Learn to think realistically and optimistically. Sometimes positive thinking is a form of denial. Learn to confront negative and painful issues head on, knowing that all experiences are teachers.
5. See others as spiritually unique beings who can teach you. Acknowledge them for their contribution to your life experience.
6. Practice the art of intimacy. Create intimate, loving relationships that honor your spiritual uniqueness and that motivate you to your highest good. Recognize your vulnerability and honor it so that you may love and be loved fully.
7. Practice the art of being and doing good without seeking recognition.
8. Become part of a community or group that supports you in your spiritual growth. Contribute through service to your community. Let your work life be meaningful and purposeful. Let your work be more than a job.
9. Practice the art of nutritional living. Feed and exercise your body as you acknowledge the holistic approach to wellness. Eat and exercise mindfully.
10. View life with a sense of humor. Learn to see the absurdity of life's political and cultural rules. Practice the art of laughter.
11. Know and honor your dependence on the environment for your well-being. Respect your relationship with all living things on this planet. All life is sacred.
12. Learn the art of spiritual practice. Develop a set of spiritual practices that honor you relationship with your Higher Power or God. Create a place where you practice your spiritual rituals regularly, whether it be church, synagogue, mosque, home, or wilderness.