CLIENT WELCOME PACKET

Please note that the text in brackets [xxx] is instructional for preparing the packet and should be deleted. The gray shading indicates information that can be personalized for **your own packet**.

The Welcome Packet includes:

* *Client Welcome Letter*
* *Characteristics of a Coaching Relationship*
* *Coaching Agreement*

Optional Document

* *Wheel of Life (available on CCE website Portal)*

WELCOME PACKET

For more information, please contact:

A drawing of a face

Description automatically generated

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[Client Welcome Letter]

Dear Samuel,

I want to first thank you for inviting me to be your coach—I consider this a privilege and I’m looking forward to our time together.

I’ve enclosed a *Welcome Packet* to help you become acquainted with ABC Coaching and prepare you for our preliminary meeting. Please read all of the information.

To optimize our meeting, bring your *Welcome Packet* as we will review the necessary information in the packet and set up the logistical side of our coaching relationship. During this meeting, we will work together to put into place the direction and focus of our future coaching sessions.

Please allow 1½ hours for the preliminary meeting. This will give us the opportunity to spend time getting to know one another better and allow ample time to review essential information, sign the coaching agreement, talk about any questions you may have, and focus on your coaching agenda.

Feel free to contact me prior to our meeting that is scheduled for date, time at location.

Sincerely,

John Doe, PCC

ABC Coaching

E-mail: John@ABCoaching.com

www.ABCcoaching.com

Office: 218-332-4444

Fax: 218-332-2323

Characteristics of a Coaching Relationship

Partnership Exists Between Coach and Client

Coach establishes clear agreements.

Coach creates a safe, supportive environment that produces ongoing respect and trust.

The coaching relationship exists to serve the client.

Focus is on meeting the client’s agenda.

Personal Growth and Change is Affirmed

Coach expresses genuine affirmation, support, and encouragement to the client.

Coach has sincere concern for the client’s well-being.

Coach gives respect, shows interest, and expresses belief in and for the client’s goals and desired outcomes.

Coach uses language that has the greatest positive impact on the client.

Responsibility Belongs to the Client

Coach trusts the client to be responsible.

Client owns and follows through on the goals and action steps created.

Coach Believes the Best About the Client

Coach expresses genuine belief in the client.

Coach demonstrates acceptance and nonjudgmental stance.

Coach gives room for the client to fail.

Intentional Focus Is on the Client’s Distinctiveness

Client’s strengths are championed.

Client’s uniqueness is respected.

Client’s self-awareness is encouraged.

Exploration and Discovery Are Encouraged Through Active Listening and Powerful Questions

Coaching relationship provides a safe environment for exploration and discovery of new possibilities and avenues.

Coach asks questions that create greater clarity, insight, commitment, new learning, and action.

Coach supports and affirms new goals and behaviors.

Integrity, Authenticity, and Sincerity Are Marks of the Coaching Relationship

Coach demonstrates integrity, authenticity, and sincerity.

Coach keeps commitments.

Trust is a central standard of the relationship.

*[The following is a generic sample coaching agreement with portions inserted as recommended from the International Coach Federation Ethics committee. The agreement is for you to use as a guideline in creating an agreement that represents your legal relationship with your client(s). You will find standard clauses covering all angles to protect you and your clients. Once you have drafted your version, we recommend you show it to your lawyer for a final stamp of approval.]*

Coaching Agreement

Agreement between COACH’S NAME, CREDENTIALS (Coaching qualifications, certificates, etc.), and CLIENT’S NAME, whereby Coach agrees to provide coaching services for Client, focusing on topics/results/outcomes/goals.

What Is Coaching?

“Coaching is partnership (defined as an alliance, not a legal business partnership) between the Coach and the Client in a thought-provoking and creative process that inspires the client to maximize personal and professional potential.”[[1]](#footnote-1)

“Professional coaches provide an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. Coaches help people improve their performance and enhance the quality of their lives.

“Coaches are trained to listen, to observe, and to customize their approach to individual client needs. They seek to elicit solutions and strategies from the client; they believe the client is naturally creative and resourceful. The coach’s job is to provide support to enhance the skills, resources, and creativity that the client already possesses.“[[2]](#footnote-2)

Responsibilities

1. Coach agrees to maintain the ethics and standards of behavior set by the International Coach Federation (ICF) (www.coachfederation.org/ethic).
2. Client is responsible for creating and implementing his or her own physical, mental and emotional well-being, decisions, choices, actions, and results. As such, the Client agrees that the Coach is not and will not be liable for any actions or inaction, or for any direct or indirect result of any services provided by the Coach. Client understands that coaching is not therapy and does not substitute for therapy if needed, and does not prevent, cure, or treat any mental disorder or medical disease.
3. Client understands that coaching is not to be used as a substitute for professional advice by legal, mental, medical, or other qualified professionals and will seek independent professional guidance for such matters. If Client is currently under the care of a mental health professional, Coach will recommend that the Client inform the mental health care provider.
4. Client agrees to communicate honestly, be open to feedback and assistance, and create the time and energy to participate fully in the coaching process.

*(Personal Comment: If at any time you are dissatisfied with something, please talk with me. I will work with you to resolve any difficulties.)*

Services

The parties agree to engage in a \_\_\_-month coaching program. Coaching sessions are conducted over the phone, Internet, or in person if both the Coach and Client are in the vicinity.

Coach will be available to Client by e-mail and phone in between scheduled meetings as defined by the Coach *[describe those terms here]*. Coach may also be available for additional time, per Client’s request, for professional writing and editing services such as website and blog editing, creation of marketing materials, on a prorated rate of $000 per hour.

*(Personal Comment: You are encouraged to contact me between scheduled sessions by e-mail or “spot calls” (~5 minutes or so in length) with questions, struggles, thoughts, accomplishment reports, or just to touch base. These contacts are included in your monthly fee. I enjoy delivering this extra level of service and the extra contact will be beneficial for you.)*

Schedule & Fees

This coaching agreement is effective Month, Date, Year. The coaching fee is $000.00 *[Delete fee section if not applicable.]* You will receive a PayPal request money invoice on the 1st of each month, payable on the 4th of that month. If rates change before this agreement has been signed and dated, the prevailing rates will apply. The meetings will be one hour in length. If paying by check, you will be invoiced the last week of the month, payable by the fourth of the following month.

Procedure

The time of the coaching meetings and/or location will be mutually determined by the Coach and Client. The Client will initiate all scheduled calls and will call the Coach at the following number for all scheduled meetings: xxx-xxx-xxxx. If the Coach will be at any other number for a scheduled call, the Client will be notified prior to the scheduled appointment time. If meeting is online, a link will be provided to enter the virtual coaching room for all of the coaching sessions. The day prior to the coaching session, the Client will e-mail the Coach a *Coaching Prep Form* that reviews accomplishments, action steps, and a proposed agenda for the session.

Confidentiality

This coaching relationship, as well as all information (documented or verbal) that the Client shares with the Coach as part of this relationship, is bound to confidentiality by the International Coach Federation (ICF) Code of Ethics but is not considered a legally confidential relationship (as in Medicine or Law). The Coach agrees *not* to disclose any information pertaining to the Client without the Client’s written consent. The Coach will not disclose the Client’s name as a reference without the Client’s consent. Confidential information does *not* include information that: (a) was in the Coach’s possession prior to its being furnished by the Client; (b) is generally known to the public or in the Client’s industry; (c) is obtained by the Coach from a third party, without breach of any obligation to the Client; (d) is independently developed by the Coach without use of or reference to the Client’s confidential information; or (e) that the Coach is required by law to disclose.

Release of Information *[optional based upon specific situation]*

The Coach engages in training and continuing education pursuing and/or maintaining ICF credentials. ICF conducts regular audits to verify applicants’ coaching experience. Coaches selected for audit will be required to access the contact information for their clients or, for confidential internal coaching, an individual within the organization who is authorized to verify their coaching hours. Coaches selected for audit will not submit client logs directly to ICF.

By initialing below, you agree to have your relevant coaching information stored in a protected storage space.

*Initial below:*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Client Agrees |  |  | Client Refuses |  |

According to the ethics of our profession, topics may be anonymously and hypothetically shared with other coaching professionals for training, supervision, mentoring, evaluation, further coach professional development, and/or consultation purposes. *[Optional]*

Cancellation Policy

In the event of a cancellation, the Client agrees that it is the Client's responsibility to notify the Coach xx *[number of]* hours in advance of the scheduled calls/meetings. The Coach reserves the right to bill Client for a missed meeting. The Coach will attempt in good faith to reschedule the missed meeting.

Termination

Either the Client or the Coach may terminate this agreement at any time with xx weeks’ written notice.

Limited Liability

Except as expressly provided in this agreement, the Coach makes no guarantees or warranties, expressed or implied. In no event will the Coach be liable to the Client for consequential or special damages. Notwithstanding any damages that the Client may incur, the Coach’s entire liability under this agreement, and the Client’s exclusive remedy, will be limited to the amount paid by the Client to the Coach under this agreement for all services rendered up until the termination date.

This is the entire agreement of the parties and reflects a complete understanding of the parties with respect to the subject matter. This agreement supersedes all prior written and oral representations.

If a dispute arises out of this agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to certain amount of time, such as 30 days after notice is given. If the dispute is not resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney’s fees and court costs from the other party.

Client and Coach electronically sign the Client Agreement following the preliminary meeting; each party retains a copy for their records.

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

CLIENT’S NAME, Client

[*client signs on above line*]

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

COACH'S NAME, Coach

[*coach signs on above line*]

1. International Coach Federation, 2007 [↑](#footnote-ref-1)
2. Patrick Williams and Diane S. Menendez, *Becoming a Professional Life Coach, First Edition: Lessons from the Institute for Life Coach Training,* (New York, NY: W.W. Norton & Company, Inc. 2007), xxviiii [↑](#footnote-ref-2)