Sample Coaching Client forms

PLEASE READ THIS IMPORTANT NOTICE

The following coaching contract form is being made available only as a sample agreement for consideration by you in developing a contract that represents your particular coaching and legal relationship(s) with your client(s). It is intended to serve as a reference or guide only. Once you have drafted your version, it is strongly recommended that you review the draft form with your legal counsel for any additional input and for consideration of the applicability of the ICF Code of Ethics to the proposed relationship. Positive Acorn is making this sample coaching agreement available “AS IS” without any warranties or representatives as to its suitability or use for any particular purpose.

Positive Acorn specifically disclaims any and all liability or responsibility for any claims, actions, losses, injuries of any kind or nature or damages to person or property arising out of or resulting from your voluntary decision to make use of this sample document or any variation hereof.

Although, we have provided these and a form that is easy to copy and edit, please note- these forms are purposefully in need of some edits and customizations to encourage users to reflect upon their own coaching policies and procedures when working with clients.

Below you will find samples of:

* Coaching Agreement
* Client Profile
* Call Focus form
* Authorization to release information

**XXXXX**

**XXXXXXX**

**XXXX**

**Dear XXXX,**

**Please complete the enclosed items and return them to me by mail at your earliest convenience. Feel free to return digital copies if this is more convenient. The “call focus” form is for you to fill out before each of our sessions to help us make best use of our time together. I would appreciate your e-mailing it to me before our sessions as it also helps me focus and get ready to work with you. I will keep the other forms in my records and I recommend you do the same.**

**We have agreed to meet at a time and date that is mutually convenient and for XXX each meeting at a cost of XXX US Dollars per session. I am also available to you via email, and I am happy to be in touch with you between appointments in this manner. If we ever need to modify our meeting frequency or times I am happy to do so.**

**If you have questions, or want to leave a voice mail message please call me at** XXXXX **or e-mail me at XXXXX. I do check my voice mail and email regularly.**

**I am looking forward to getting started. In the meantime, do not hesitate to email, fax or call if I can be of any help!**

**Warmest regards,**

**XXXXXX**

# Authorization to release information for Professional Credentialing

 I\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ give permission to XXXX to use my name, contact information and hours of coaching towards any of her credentialing processes as a coach.  I further permit those credentialing agencies to contact me for verification of the information she provides.  This permission will remain in effect until specifically canceled by me.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Date

Please email to: XXXX

Or mail to: XXXXX

**COACHING AGREEMENT**

Welcome to XXXXX a professional Coaching practice.  This document and attachments constitute a contract between us (the "Agreement").  You should read it carefully and raise any questions and concerns that you have before you sign it.

**Services:**

The services provided by XXXX include Coaching on topics decided jointly with you, the client.

The purpose of coaching is to identify and implement strategies to help you reach personal goals of enhanced performance and personal satisfaction.  Coaching may address specific personal projects, life balance, job performance and satisfaction, or general conditions in your life, business, or profession. Coaching utilizes strategic planning, values clarification, brainstorming, motivational counseling, and other counseling and consulting techniques.

**Payment Procedure:**
The cost for services is $ XXXXX Dollars per XXXX minute session. Payment schedules and methods will be worked out in a mutually agreeable way among the parties to the agreement.

**Feedback:**
If, at any time, you feel that your needs are not being met or you are not getting what you want out of the coaching please tell me, so we can discuss your needs and adjust your coaching program, as needed.  We will continue to work on the goals that you define unless you want to stop, which we will do whenever you ask.

**Session Time:**
Coaching is scheduled at the mutual convenience of the Coach and the Client.  The day and time for the next call will be scheduled at the close of each coaching session.

C**ancellations:**
I ask that you give 24 hours prior notice if you need to cancel or change the time of an appointment.  The Coach will make reasonable efforts to reschedule sessions that are cancelled in a timely manner. I reserve the right to charge for sessions that are cancelled less than 24 hours in advance.

**Termination:**

Either party may end the coaching relationship by providing the other party with a one-week written notice, which may be transmitted by email or fax.

**Confidentiality:**I protect the confidentiality of the communications with my clients, including my coaching clients as described by the International Coach Federation code of ethics. I will only release information about our work to others with your written permission, or if I am required to do so by a court order or similar state mandate.

It is impossible to fully protect the confidentiality of information which is transmitted electronically.  This is particularly true of E-mail and information stored on computers connected to the internet, and if you use a cordless or cell phone.

As a final note, I cannot fully protect confidentiality in cases of team or group coaching, in which members of the group may choose to reveal information without my knowledge or approval.

**Nature of the Relationship:**

The Client has been made aware that the coaching relationship is in no way to be construed as psychotherapy, psychological counseling, or any type of therapy. In the event the client feels the need for professional counseling or therapy, it is the responsibility of the Client to seek a licensed professional.

**Mutual Nondisclosure**:

The Coach and Client mutually recognize that they may discuss future plans, business affairs, customer lists, financial information, job information, goals, personal information, and other private information.  The Coach will not voluntarily communicate the Client's information to a third party.  In order to honor and protect the Coach's intellectual property, the Client likewise agrees not to disclose or communicate information about the Coach's practice, materials, or methods to any third parties

Dispute Resolution

Any controversy or claim arising out of or relating to this agreement, or the breach of this agreement, shall be settled by arbitration, which will occur via telephone by an arbitrator that we mutually agree upon.  The costs of the arbitration shall be borne by the losing party.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your signature below indicates that you have read the information in this document ("Coaching Agreement and Informed Consent) and any Attachments, and agree to abide by its terms during our professional Coaching relationship.

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

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

Please fill out and return this page.

Client Profile

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

NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COMPANY/ORGANIZATION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ STATE: \_\_\_\_\_\_\_\_\_\_\_ ZIP: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

DAY PHONE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EVE PHONE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ CELL PHONE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VOICE MAIL: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ FAX LINE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

WHAT IS YOUR PREFERRED METHOD OF CORRESPONDECE: E-MAIL, FAX, OR TEXT?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

OCCUPATION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME OF SIGNIFICANT OTHER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CHILDREN’S NAMES/AGES: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ STATE: \_\_\_\_\_\_\_\_\_\_\_ ZIP: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

COUNTRY\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

OTHER RELEVANT/INTERESTING FACTS ABOUT MYSELF: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Call Focus Form**

**By completing this Call Focus Form, you will be reviewing how your week has gone, your current concerns and tentative goals. The process of putting it in writing enables you to become clear about how to best use our coaching time.**

**I, too, can become oriented to your situation before our session if you send it to me before our call begins. If you transfer this form to your word processor, you will be able to fill it out each week without space limitations.**

**If possible, please complete and return this form by e-mail before each session.**

**Call Focus Form**

1. **What have I accomplished since our last coaching session?**
2. **What didn’t I get done that I intended to do?**
3. **What are the problems and/or challenges I am facing?**
4. **What are the opportunities available to me right now?**
5. **What do I want to focus on to best utilize our coaching session?**

**TO BE COMPLETED DURING COACHING SESSION:**

1. **What are my action steps, between now and our next coaching session?**