

How Coaching Works

I believe it's important for you to understand my coaching style and expectations for our working relationship. This will enable us to work together more efficiently, and for you to achieve the greatest success.

1. We will meet [WEEKLY/MONTHLY] at [TIME/DAY/DATE].
2. Before our meeting, you will complete the ongoing pre-call form and return it to me no later than 24 hours before our scheduled appointment.
3. To prepare for our call, you will decide on what area you'd like to focus. If you are unsure, then I will help you to determine where my help can be the most effective.
4. You will take the time to do the work necessary to grow your business. Coaching is not a "done for you" relationship. You must commit to do the work, or you will not have satisfactory results.
5. If, at the time of our meeting, you are unprepared, we will reschedule to give you time to complete the work necessary to move forward.
6. Each month, we will prepare and review the monthly review form, so that we can both know you are benefiting from our relationship. If at any time one of us feels you are not benefiting, we will agree to end our relationship.



Coaching Success Guidelines

Client Name: _____

The Coaching Process

Business/Executive coaching can help you to meet the goals that you have for your business/career/life when you take the time to develop a solid relationship with the coaching professional. It is the coach's objective to motivate you and hold you accountable for achieving your goals. From an outside standpoint, a skilled coach may be able to see areas of concern that you are not able to discern. In that sense, the process raises your awareness of a different way to handle your business entity.

My Coaching Philosophy

I am skilled and passionate about coaching and consulting leaders, entrepreneurs, business owners, executives, and aspiring people to maximize their lives through mindset, systems, processes, accountability, and sound strategy. I believe that the answer to your long-term successes is within you. Together, we will work to marry your performance with your significant potential.

What is Expected of the Client

The client is expected to attend each session on time and ready to work. They may need to be open to changes in their goals as the coaching process evolves. Coaches are not judgmental but impartial. To that end, coaches will ask the tough questions and expect the tough answers in order for growth to take place both personally and professionally, but only as it pertains to the business. However, clients do maintain the right to decide what topics to cover and to terminate a subject if they don't want to discuss it further.

What is Expected of the Coach

The coach is expected to listen to the client and their desires and work within that guideline as much as possible. Guidelines will be set down for each session ahead of time so that the client is aware of what behavior will and won't be tolerated. The goal of each coaching session is to work through setbacks the client may have, clarify goals through exercises and find ways to move forward on goals with the client, i.e. creating action items. The client is expected to also hold themselves accountable for what they do and don't do to make these sessions productive.

Coaching Code of Ethics

As your coach, I agree to abide by the following:

- I will not knowingly misrepresent my knowledge or expertise either publicly or privately, and I will be transparent regarding my education, certifications, and other qualifications.
- I will hold all discussions with my clients in the strictest confidence, except where doing so may cause harm to others.
- I will not provide information or advice that I do not believe in or that I would not personally follow.
- I will honor all agreements with my clients and others, including contracts, scheduling, and assigned tasks.
- I will not knowingly take any monetary, professional or other advantage of any coach/client relationship.
- I will conduct myself in accordance with this code of ethics whenever I am engaged in any coaching relationship or capacity.

Coaching Confidentiality Agreement

In order for us to work together with integrity, it's important for us to agree to hold all of our conversations in confidence. Toward that end, you and I agree to never share the following information with others, unless mutually agreed upon ahead of time:

- Financial information, including earnings, goals, and coaching fees
- Proprietary business information or processes
- Coaching strategies and techniques
- Business-related purchases or investments
- Any recorded conversations, whether video, audio, or transcribed
- Notes and task lists
- Any documentation related to our coaching relationship, such as legal agreements, pre-call and post-call review forms, checklists, and questionnaires



How to Hold Me Accountable

How do you want to be held accountable?

One of the most challenging aspects of coaching is knowing what to do when the person I'm working with is not completing the work we've agreed upon.

Since everyone's motivations are different, I'd like you to tell me how I should respond in these situations:

If you are not prepared for a scheduled meeting (first time), would you like me to:

- ☐ Immediately request to reschedule
- ☐ Spend the meeting discussing why you were unprepared and how to better manage your time

If you are not prepared for a scheduled meeting (repeated offense), would you like me to:

- ☐ Immediately request to reschedule
- ☐ Pause our coaching relationship while you reprioritize your tasks
- ☐ Suggest a time-management coach to help you

If you do not complete the work required to move forward toward your goals (first time), would you like me to:

- ☐ Help you explore potential roadblocks and solutions
- ☐ Revise our plan to include smaller sub-goals

If you do not complete the work required to move forward toward your goals (repeated offense), would you like me to:

- ☐ Revise our plan to include smaller sub-goals
- ☐ Impose a monetary fine
- ☐ Pause our coaching relationship while you reprioritize your tasks

If, after _____ days of coaching, you have not achieved the goals we outlined at the beginning of our relationship, would you like me to:

- ☐ Suggest a different coach who you might work better with
- ☐ End our coaching relationship
- ☐ Revisit our initial agreement and revise accordingly
- ☐ I'm entirely okay with a "tough love" approach and want you to challenge me directly and "give it to me straight"