

Client Policies and Procedures

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.

- FEE** Clients pay me on time unless prior arrangements have been made. Payment may be made by check or credit card.
- PROCEDURE** 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 e-mail a completed form before each call. The agenda is client generated and coach supported.**
- CALLS** 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.
- CHANGES** 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.
- EXTRA TIME** 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 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.
- PROBLEMS** 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.
- A MUST** 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.

Life Coaching Agreement

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. 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:

Email: lori@dakotalight.net
Web: www.dakotalight.net

1801 E. Kemp Ave. Watertown, SD 57201
Phone: 605.753.5520

CLIENT DATA FORM

Date: _____

Name: _____

Occupation: _____

Business Name: _____

Home Address: _____ Preferred Address

Business Address: _____ Preferred Address

Day Phone: _____ Evening Phone: _____

Fax Line: _____ Cell Phone: _____

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) _____ [or] (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? _____

Dakota Counseling & Mediation
A Place to Heal and Grow  *Lori Redlinger, M.S., L.P.C.*

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? _____

Dakota Counseling & Mediation
A Place to Heal and Grow  *Lori Redlinger, M.S., L.P.C.*

Where do you want to focus first? _____

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.

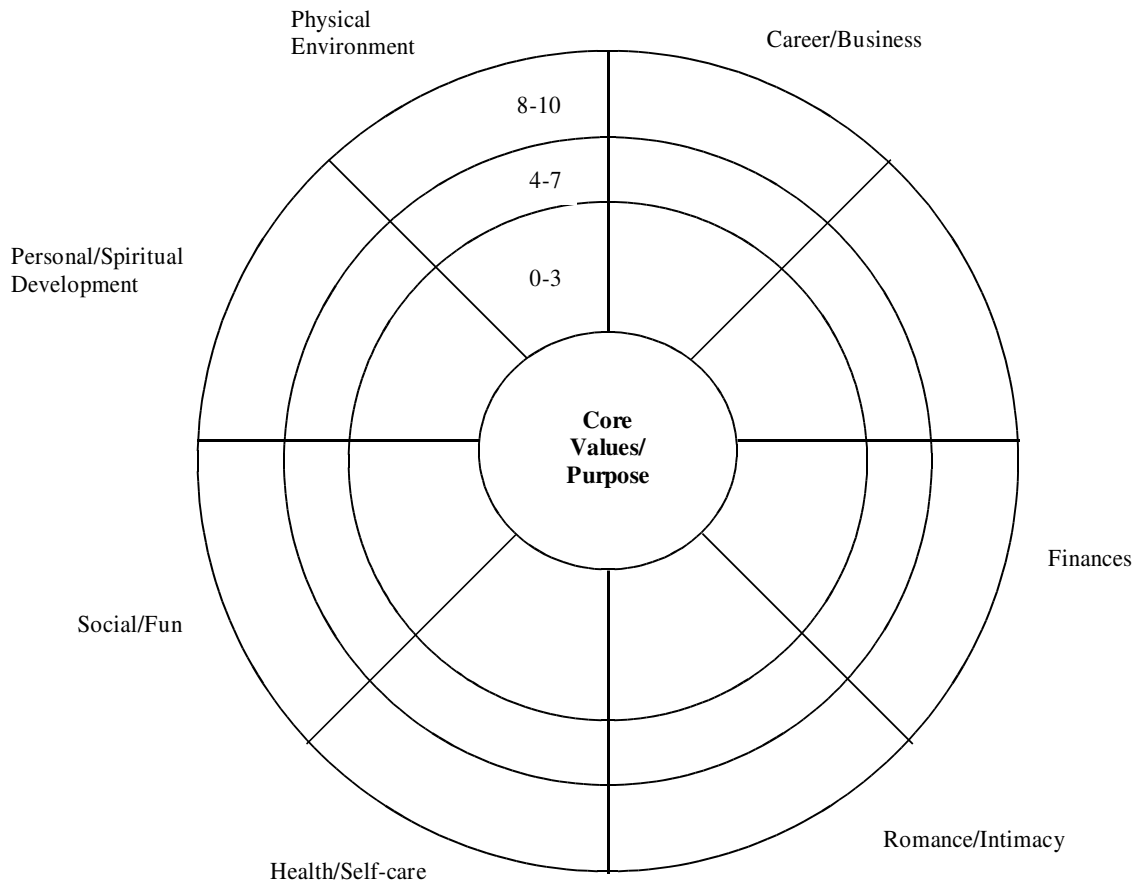
You may or may not choose to do anything about them right now, but just becoming aware of and articulating them will bring them to the forefront where you'll naturally start eliminating, fixing or resolving them.

ENERGY DRAINERS AT WORK

ENERGY DRAINERS AT HOME

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.

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 Institute for Life Coach Training

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:

Personal:

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

Business:

Personal:

What I hope to gain from this coaching relationship:

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

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.

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