



DONNA M. STEPHENS
BOARD CERTIFIED LIFE COACH 2780

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 question, please call me.

Fee Clients pay me on time unless prior arrangements have been made. Payments may be made by check, cash or PayPal only.

Procedure My clients call or arrive on time. Come to the session with updates, progress and current challenges. Let me know what you want to work on, be ready to be coached. Make copies of the enclosed client prep form and complete the form before each call. The agenda is client generated and coach supported.

Appointments Our agreement includes a set amount of appointments. If you or I are on vacation, we will arrange a make up time that is convenient for both of us.

Changes My clients give me 24 hours notice if they have to cancel an appointment. If you have an emergency, we will work around it. Otherwise, a missed appointment is not made up and you will be charged for the time.

Problems I want you to be satisfied with our relationship. If I 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

To my client: Please review, adjust, sign where indicated, and return to me:

NAME: _____

PER SESSION FEE: \$ _____, SESSION DAY _____,

SESSION TIME _____

NUMBER OF SESSIONS PER MONTH _____

DURATION: _____ (length of scheduled session)

REFERRED BY: _____

PROTOCOL:

1. CLIENT ARRIVES OR CALLS FOR THE APPOINTMENT
2. CLIENT PAYS COACHING FEES IN ADVANCE OR AT THE SESSION TIME.

1. As a client, I understand and agree that I am fully responsible for my well-being during my coaching sessions, 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 exclusive 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 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 understand that life coaching is not to be used in lieu of professional guidance of 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: _____

Welcome Packet

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?

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?

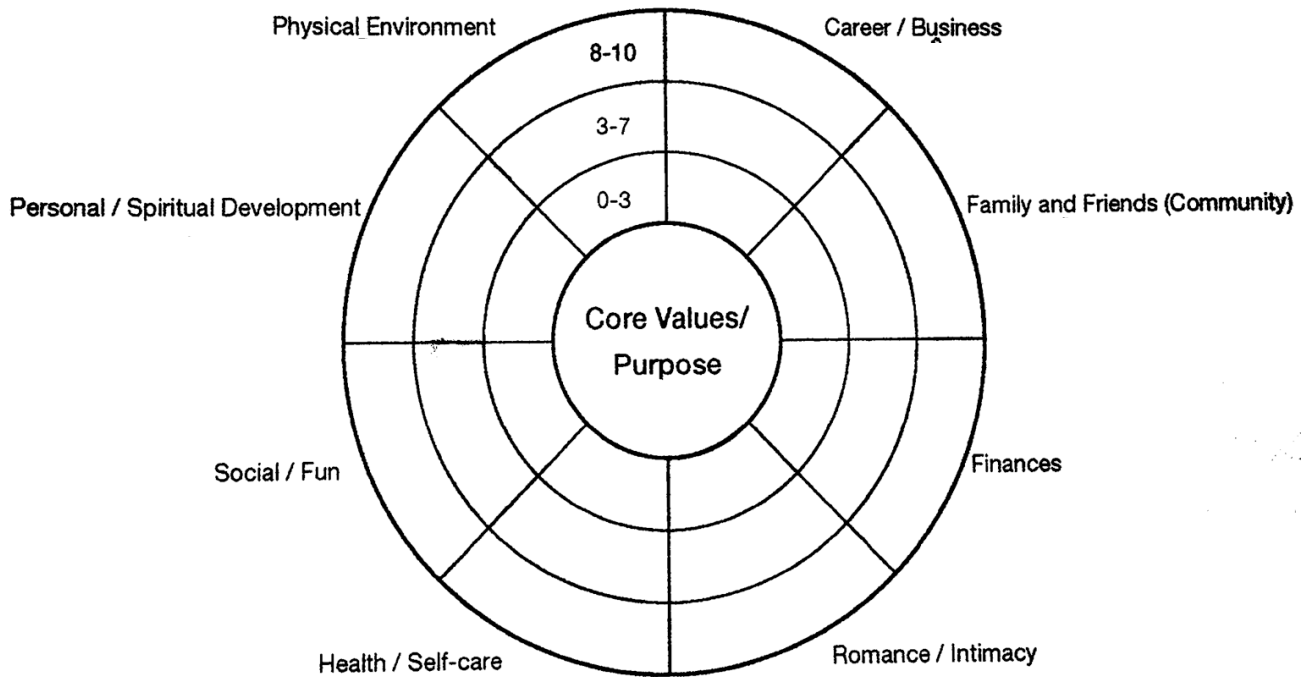
Business:

Personal:

What I hope to gain from this coaching relationship:

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

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.

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.