A logo for a company

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CLIENT WELCOME PACKET

COACHING SERVICES

77 South Main Street

New city, NY 10956

Date

Client Name

Client Address

Welcome to VCS, Inc. We are pleased to and excited to see that you have decided to take advantage of our services. Enclosed you will find the Welcome Package that was mentioned when you signed up on our site. It includes:

* A Goals worksheet – Complete the Goals column before our first session.

Your Payment Arrangement Form

(2) Copies of your Coaching Agreement – Please sign both. Keep one for your records and return the other to me before on our first session.

A copy of our Coaching Success Guidelines

Please fill out the Goals worksheet before our first session so we can get started promptly.

If you have any questions in advance of the first session, do not hesitate to call or email me. I look forward to meeting with you on [INSERT DATE/TIME OF FIRST SESSION].

Your Signature

Your Name (printed)

**VCS INC**

[vcs-inc.org](mailto:you@coachingwebsite.com)

(845) 634-5729

Dear Coachee:

I am excited that you have joined me in what will be a successful coaching relationship.

I know that in a matter of weeks you will begin to see your life transform, based on the goals and action plans that we will create together, and you will achieve.

My commitment to you is:

• To develop a positive process, tailor-made to suit your agenda and specific needs.

• To establish an interactive relationship between you and me, based on the full commitment of all parties.

• To endeavor to motivate and facilitate you to achieve your true potential and bring positive change through the setting and achieving of your self-defined goals.

• To operate on the premise that all parties are creative and resourceful with the ability and the potential to express and define their own solutions.

• To establish a partnership which challenges you to recognize and build on strengths, explore your current reality, and find positive ways to make changes and move forward.

• To be an instrument in helping you to develop a fresh perspective on each situation you are facing, supporting you to explore a range of options.

• To maintain the highest level of integrity and unbiased opinion of you - regardless of your gender, ethnic, social, or religious background.

• To maintain respect for your confidentiality.

I’m also excited to tell you that you do not have to wait until our first session to begin. You can start today! I have included a question sheet that will require your reflection to complete. The answers will work as the base for our coaching sessions.

I also ask that you complete and sign all of the forms in this package prior to our first session.

If you have any questions, please do not hesitate to contact me. I look forward to our first coaching session!

Warmest Regards,

Coach

77 South Main Street

New city, NY 10956

Date

# Coaching Success Guidelines

|  |  |
| --- | --- |
| ***Client Name:*** |  |

The Coaching Process

Coaching can help you to meet the goals that you have for yourself 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 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 things in your life or business.

**Our Coaching Philosophy**

At VCS-Inc., we strongly believe that everyone deserves to be able to access support for their growth and change goals. Counseling, Coaching, and Licensed Clinical treatment should never be out of reach due to lack of insurance or socio-economic status. Every Wellness Coach at VCS-Inc. believes in the capacity of each client to shape their lives according to their deepest values and goals. The Wellness Coaching Services at VCS-Inc. was designed to help clients:

Understand their present situations

Clearly envision the changes they want to make

Turn those desired changes into achievable goals

Develop action plans with clear timeframes

Take consistent, powerful action to achieve those goals

Understand how to break unhelpful habits or patterns that hold them back

Understand how to create helpful habits or patterns that push them forward

**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 sometime need to ask tough questions that require tough answers in order for personal or professional growth to take place (but only as it pertains to the situation). Clients who are willing to participate in these difficult conversations on occasion will experience significant growth as a result of examining their patterns. 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. 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 hold themselves accountable for what they do and don’t do to make these sessions productive.

How Coaching Works

We believe it’s important for you to understand our 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] 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 first session, 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 succeed. Coaching is not a “done for you” relationship. You must commit to do the work, or you will not have satisfactory results.
5. 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 believes that you are not benefiting, we will discuss options for improving our approach to your goals or agree to end our relationship.

Trouble-Shooting Coaching Setbacks

Change is not easy. If it were, no one would struggle with it. Although change is difficult, it is possible, especially with support. Effective coaching can be a powerful force for transformation in your life. However, no matter how skilled a coach may be – the process of coaching can only be effective if the client takes consistent action outside of coaching sessions towards their goals. **Coaching is a partnership**.

The following is a list of ways in which you, as a client, might struggle with holding up your end of the partnership and some of the ways in which your coach will hold you accountable.

**If you are not prepared for a scheduled meeting (first time), your coach may:**

* Immediately request to reschedule.
* Use the beginning of the meeting discussing why you were unprepared and how to overcome the obstacle(s) to you preparing for session.

**If you are not prepared for a scheduled meeting (repeated), your coach may:**

* Immediately request to reschedule.
* Suggest a time-management coaching session to help you.

**If you do not complete the work required to move forward toward your goals (first time), your coach may:**

* Help you explore potential roadblocks and solutions.
* Help you revise your plan to include smaller sub-goals.

**If you do not complete the work required to move forward toward your goals (repeated), your coach may:**

* Work with you to revise your plan to include smaller sub-goals.
* Suggest that you pause your coaching relationship while you reprioritize your tasks.

**If, after \_\_\_\_\_\_ weeks of coaching, you have not achieved the goals outlined at the beginning of your relationship, your coach may:**

* Revisit your initial agreement with you and revise accordingly.
* Suggest a different coach who you might work better with.
* Agree with you to end the coaching relationship.

**Client Agreement**

I understand that coaching is NOT A FORM OF THERAPY, although coaching may be used in conjunction with therapy.

I understand that through our sessions we will be dealing with my present situation and my future, but NOT delving into the past in a therapeutic manner.

I understand that my coach, YOUR NAME is not a doctor and thus not able to give medical (mental or physical) advice from a medical stand point.

I understand that I may stop our coaching sessions at any time, but that will not allow for a refund.

I understand that my coach’s qualifications are as follows:

*Examples:*

My coach is a volunteer who has been receive coaching training form VCS Staff

I understand that I am able to contact VCS office to verify my coach name, but that VCS Inc., like Coach (YOUR NAME) is also not responsible for the choices I make in my life.

I understand that what we discuss is confidential unless I indicate, in any way, that I would harm myself or others then the proper authorities will be notified.

I understand that my coach does not control the direction of my life.

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

Date                                                               Signature

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
* Notes and task lists
* Any documentation related to our coaching relationship, such as, checklists, and questionnaires

**How to Prepare for a Coaching Session**

**Please use this checklist to prepare for our session each week**

**One week Prior**

* Block out time on your calendar to complete the necessary work
* Write out your task list

**Daily**

* Work on your task list
* Make notes about your struggles
* Keep a list of questions for our next session

**One Day Prior**

* Complete and return your Pre-Session form
* Review your struggles and questions list
* Verify the time/day of your appointment

**Immediately after**

* Review your notes from the sessionl
* Expand on your plan (if necessary)

**Client: Self-Assessment Worksheet**

1. What are your main goals for your coaching sessions, in priority order? What do you hope to get out of your coaching sessions?
2. What challenges do you face? What is most difficult for you right now?
3. What are your 3 biggest strengths?
4. What are your 3 main weaknesses (or concerns)?
5. What ideas do you have for moving forward? (Your coach will review these and offer suggestions)
6. What is your preferred learning style? I.e., do you prefer to see, hear or read in order to learn best?
7. Do you have any ideas on how you'd like coaching sessions conducted? Describe your ideal coaching session.
8. Please write any questions or concerns you have

VCS Inc

Date

Client Name

Client Address

**Fee Schedule:**

According to the agreement you have entered, payment for weekly coaching services provided by VCS Inc. will be charged to you just after each session for the amount of\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Payment Options:**

Payment is accepted through:

* PayPal via our site at VCS-Inc.org
* Cash (exactly amount) at our office on service hours (Monday -Thursday 9am -9pm, Friday 9am – 5pm)
* Card through call phone Monday to Friday 9am -3pm or in person at the office on service hours

You may cancel at any time in advance of your next session in accordance with our cancellation policy. The policy is detailed in your Coaching Agreement.

If you have any questions about this invoice, please contact us by telephone or email.

Phone: (845) 634-5729 ext.\_\_\_\_\_\_

**VCS Inc**

Email:

Vcs-inc.org

**Policies and Procedures**

The following policies and procedures are in place to assist both you and us in having a fulfilling coaching relationship. If you have any questions regarding these items, please do not hesitate to contact us.

1. The client agreement form must be signed at our first session and returned to me. A copy of this agreement will be provided to you.

2. It is your responsibility to phone in at your scheduled time (for phone clients) or arrive on time at the office (for in-person clients).

5. Each of our sessions will last approximately 45 minutes. Plus 5 minutes to make payments.

6. During these sessions we will work on techniques to assist you in attaining your goals. COACHING IS NOT A FORM OF THERAPY. We will deal primarily with your present environment and thought process and work to create maximum success in all you do.

7. In between our sessions, should you have any questions or concerns, I invite you to contact me by email at: YOUR EMAIL.

8. At the end of every session we will have decided on exercises for the upcoming week. I encourage you to complete these assignments (they may be affirmations, reflections etc.)