

ILLCP 93(a) Strategic Coaching Practices: Tracking Tools

This class presents Best Practices for organizing yourself and always bringing your best self to your sessions. Part one of this course is designed to help you, "break the ice" and start building trust; how to track the progress of your participants and stay organized.

The Benefits of CARE-Readiness Tools

1. The CARE-Ready Coaching tools will help you stay focused on the things the client needs to improve upon, and help you to recognize how to, more fluidly, work with them.
2. These tools also help in setting up dialogue and laying out a path for our clients to make discoveries about themselves. This is especially helpful in human service coaching. You will be communicating more effectively in spite of cultural, gender, orientation, age, or religious barriers because you will have a better grasp of the personality types you will be working with.
3. As a CARE-Ready Coach you may encounter many clients who are very religious or they have a spiritually-focused life. You can use these tools to help them in their discovery process, even if you are not a religious or spiritual person. These tools provide a point of reference for you to make with your client.
4. One of the tools you will use is the personality profiles tool. We believe that you should use this coaching tool for yourself personally as you begin coaching clients. You will see how it can enhance your coaching, causing you to understand your client in a fundamental way. It gives you the solid footing that you need to know the best methods and means to engage them.
5. All of the tools help the client to focus their thoughts on their priorities and goals for life.
6. The tools help the clients to see themselves for where they really are in their relationship with others, even if they aren't always willing to admit it right away.
7. The tools keep the conversation focused, seeking real-life answers for the issues your clients have been dealing with, allowing wisdom to come through that reveals the best way to navigate.
8. The tools will help cut down on extraneous, idle and argumentative conversation.

9. The tools help clients get to the root of their issues without wandering through "rabbit trail" conversations that waste time. You will move forward from dealing with the branches and fruit of the issues, and instead, get to the root causes.
10. The tools will help you to see if the client is really ready to deal with their toughest issues.
11. The tools will help the coach be more organized in leading clients, step by step, to realize and accomplish their goals. One of the most fulfilling experiences is to watch clients see what has been stopping them and choose to use the tools to help them overcome the obstacles.

The next few pages present the tools that we use in this CARE-Readiness model.

Tracking Tools

Tracking tools are an essential part of the CARE-Readiness model.

First, we developed a welcome letter. We used this letter as a follow-up from our initial phone, email or referral contact. The welcome letter includes vital information that we request the prospective client to submit to us before the first coaching session. This information will be reviewed in the first session with the client.

The welcome letter is a proven positive first step in building trust and easing fears and anxieties that the client might have about the first meeting.

The welcome letter may include a request to complete a Contact Information page, a CARE-Coaching Questions exercise, or a Coach/Client Agreement form.

See - Welcome Letter (pg. 23)

See - Client Contact Information (pg. 24)

See - Coach/Client Agreement (pp. 25-29)

See - See - Intake Session Checklist/ Script/ Talking Points (pp. 31-32)

See - Client Action LOG/ Sheet (pp. 33-34)

Welcome Letter/ Email (First Contact)

Welcome to our coaching sessions. I am excited to begin working with you as you start a new chapter in your life. Enclosed is your Welcome Pack which includes:

- A Client Information Sheet
- Coach/Client Agreement
- CARE Coaching Questions

Please complete the Client information. This is vital for our conversations and will help me get to know you.

I will also go over Coach/Client Agreement and the first 4 or 5 CARE Coaching Questions with you in our first session.

Do not hesitate to contact us/me (by phone, text or email) if you have any further questions.

I am excited to begin and looking forward to our first session.

Your Name
Your Business Name

Office: 717-***-****
Text: 717-***-****
Email:

Client Contact Information

Note: All personal information is held securely in accordance with the state and federal regulations, is confidential and treated appropriately.

Client Information

First Name _____ Last name _____

Name you like to be called _____

Telephone Numbers/Contact Details

Home _____ Cell phone _____

Email _____

Preferred Contact Method _____

Employment Information

Occupation _____

Employer Name

Personal Information

Date of Birth _____

Significant Other's Name (Optional) _____

No. of Children _____

Name(s) and Age(s) of Child(ren) _____

Sample Coaching Agreement

This Agreement is entered into by and between: Name, Company, Address (Coach—identify coaching qualifications, certificate, credential etc.) and Name, Address (Client) whereby Coach agrees to provide Coaching Services for Client focusing on the following topics/results/outcomes/goals attached to this Agreement as *Schedule A*.

Description of Coaching: Coaching is partnership (defined as an alliance, not a legal business partnership) between the Coach and the Client in a thought-provoking and creative process that inspires the client to maximize personal and professional potential. It 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.

1) Coach-Client Relationship

A. Coach agrees to maintain the ethics and standards of behavior established by the United Association of Christian Churches and Ministries International (Founded in 1975).

B. Client is solely responsible for creating and implementing his/her own physical, mental and emotional well-being, decisions, choices, actions and results arising out of or resulting from the coaching relationship and his/her coaching calls and interactions with the Coach. As such, the Client agrees that the Coach is not and will not be liable or responsible for any actions or inaction, or for any direct or indirect result of any services provided by the Coach. Client understands coaching is not therapy and does not substitute for therapy if needed, and does not prevent, cure, or treat any mental disorder or medical disease.

C. Client further acknowledges that he/she may terminate or discontinue the coaching relationship at any time.

D. Client acknowledges that coaching is a comprehensive process that may involve different areas of his or her life, including work, finances, health, relationships, education and recreation. The Client agrees that deciding how to handle these issues, incorporate coaching principles into those areas and implementing choices is exclusively the Client's responsibility.

E. Client acknowledges that coaching does not involve the diagnosis or treatment of mental disorders as defined by the American Psychiatric Association and that coaching is not to be used as a substitute for counseling, psychotherapy, psychoanalysis, mental health care, substance abuse treatment, or other professional advice by legal, medical or other qualified professionals and that it is the Client's exclusive responsibility to seek such independent professional guidance as needed. If Client is currently under the care of a mental health professional, it is recommended that the Client promptly inform the mental health care provider of the nature and extent of the coaching relationship agreed upon by the Client and the Coach.

F. The Client understands that in order to enhance the coaching relationship, the Client agrees to communicate honestly, be open to feedback and assistance and to create the time and energy to participate fully in the program.

2) Services

The parties agree to engage in a ____ month Coaching Program through (describe method(s), e.g., in-person, internet, telephone) meetings. Coach will be available to Client by e-mail and voicemail in between scheduled meetings as defined by the Coach (describe those terms here).

Coach may also be available for additional time, per Client's request on a prorated basis rate of _____ (for example, reviewing documents, reading or writing reports, engaging in other Client related services outside of coaching hours).

3) Schedule and Fees: This coaching agreement is valid as of 00/00/0000. The fee is _____ (amount in advance if applicable) and/or _____ (amount) per month based on (frequency of meetings such as # of meetings per/ wk, month, etc.).

The calls/meetings shall be _____ (length of call or meeting for example 30, 45, 60, 90, 120 minutes). If rates change before this agreement has been signed and dated, the prevailing rates will apply.

The refund policy in effect for the term of this Agreement is as follows: ***Insert Coach's refund policy.***

4) Procedure

The time of the coaching meetings and/or location will be determined by Coach and Client based on a mutually agreed upon time. The Client will initiate all scheduled calls and will call the Coach at the following number for all scheduled meetings xxx-xxx-xxxx. If the Coach will be at any other number for a scheduled call, Client will be notified prior to the scheduled appointment time.

5) Confidentiality This coaching relationship, as well as all information (documented or verbal) that the Client shares with the Coach as part of this relationship, will be held in strict confidence. However, please be aware that the Coach-Client relationship is not considered a legally confidential relationship (like the medical and legal professions) and thus communications are not subject to the protection of any legally recognized privilege. The Coach agrees not to disclose any information pertaining to the Client without the Client's written consent. The Coach will not disclose the Client's name as a reference without the Client's consent.

Confidential Information does not include information that: (a) was in the Coach's possession prior to its being furnished by the Client; (b) is generally known to the public or in the Client's industry; (c) is obtained by the Coach from a third party, without breach of any obligation to the Client; (d) is independently developed by the Coach without use of or reference to the Client's confidential information; or (e) what the Coach is required by statute, lawfully issued subpoena, or by court order to disclose; (f) is disclosed to the Coach and as a result of such disclosure the Coach reasonably believes there to be an imminent or likely risk of danger or harm to the Client or others; and (g) involves illegal activity. The Client also acknowledges his or her continuing obligation to raise any confidentiality questions or concerns with the Coach in a timely manner.

6) Release of Information (Optional, based upon specific situation)

The Coach engages in training and continuing education pursuing and/or maintaining their United Association of Christian Churches and Ministries International Certification Credentials. By signing this agreement, you agree to have only your name, contact information and start and end dates of coaching shared with United Association of Christian Churches and Ministries International staff members and/or other parties involved in this process for the sole and necessary purpose of verifying the coaching relationship, no personal notes will be shared.

Client Agrees _____ Client Refuses _____

According to the ethics of our profession, topics may be anonymously and hypothetically shared with other coaching professionals for training, supervision, mentoring, evaluation, and for coach professional development and/or consultation purposes.

7) Cancellation Policy Client agrees that it is the Client's responsibility to notify the Coach ____ (number of) hours in advance of the scheduled calls/meetings. Coach reserves the right to bill Client for a missed meeting. Coach will attempt in good faith to reschedule the missed meeting.

8) Record Retention Policy (Optional, if the Coach has adopted such a policy) The Client acknowledges that the Coach has disclosed his/her record retention policy with respect to documents, information and data acquired or shared during the term of the Coach-Client relationship. Such records will be maintained by the Coach in a format of the Coach's choice (print or digital/electronic) for a period of not less than ____ years.

9) Termination Either the Client or the Coach may terminate this Agreement at any time with _#_ weeks written notice. Client agrees to compensate the Coach for all coaching services rendered through and including the effective date of termination of the coaching relationship.

10) Limited Liability Except as expressly provided in this Agreement, the Coach makes no guarantees, representations or warranties of any kind or nature, express or implied with respect to the coaching services negotiated, agreed upon and rendered. In no event shall the Coach be liable to the Client for any indirect, consequential or special damages. Notwithstanding any damages that the Client may incur, the Coach's entire liability under this Agreement, and the Client's exclusive remedy, shall be limited to the amount actually paid by the Client to the Coach under this Agreement for all coaching services rendered through and including the termination date.

11) Entire Agreement This document reflects the entire agreement between the Coach and the Client, and reflects a complete understanding of the parties with respect to the subject matter. This Agreement supersedes all prior written and oral representations. The Agreement may not be amended, altered or supplemented except in writing signed by both the Coach and the Client.

12) Dispute Resolution If a dispute arises out of this Agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to (certain amount of time such as 30 days) after notice given. If the dispute is not so resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney's fees and court costs from the other party.

13) Severability If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If the Court finds that any provision of this Agreement is invalid or unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision shall be deemed to be written, construed, and enforced as so limited.

14) Waiver The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

15) Applicable Law This Agreement shall be governed and construed in accordance with the laws of the State of _____, without giving effect to any conflicts of laws provisions.

16) Binding Effect

This Agreement shall be binding upon the parties hereto and their respective successors and permissible assigns.

Please sign both copies and return one copy of this Client Agreement prior to the first scheduled coaching meeting. Retain one copy for your records and mail the other to:

Coach name and Address:

CLIENT name and address:

Client Name and address

Name/Title:

Signature:

Date:

Coach/ for _____ (company name)

Name/Title: Coach and title

Signature:

Date:

ICF Notice and Disclaimer: The above form is being made available by the International Coach Federation “(ICF)” only as a sample agreement for consideration by you in creating or developing a contract that represents your legal relationship with your client(s). It is intended to serve as a reference or guide only. You will find possible standard clauses covering a number of important areas of the relationship intended to protect you and your clients. Once you have drafted your version, it is recommended that you review the form with your legal counsel for additional input.

ICF is making this sample coaching agreement available “as is” without any warranties or representations as to its suitability for any particular purpose. ICF specifically disclaims any and all liability or responsibility for any alleged losses, injuries or damages arising out of or resulting from a coach’s voluntary decision to make use of this sample document or any variation hereof.

From your very first session, we insist that the life coach uses:

- 1.) the Intake Session Checklist/ Talking Points and
- 2.) the Client Action Sheet (log).

The Intake Session Checklist Talking Points is a script that will help the coach cover everything that they need to discuss in the first session and sets the tone for the proper relationship with the client moving forward.

The Client Action Sheet serves as a log to record your progress and any significant notes concerning each client. This is absolutely necessary, not only for professional reasons, but also any legal issues that may come up in the future. It is absolutely necessary to maintain a client action sheet (log).

See- Intake Session Checklist/ Script/ Talking Points (pp. 31-32)

See - Client Action Sheet/Log (pp. 33-34)

Intake Session Checklist

Client Name: _____ Date: _____

The Intake session helps the coach develop a better understanding of the client needs, their way of working and helps the client understand what coaching is, what to expect and the relationship of the coach and client.

What	Talking Points/ Script	Notes
1. WELCOME CLIENT - Take control of session and explain how the session will go today.		
Set the right tone.	<ul style="list-style-type: none"> • I'm very glad to have the opportunity to sit down and talk with you. • What brought you in today, or why did you feel the need to obtain a life coach? • What have you heard about life coaching or what do you understand coaching to be about? 	
2. Explain the COACHING PROCESS		
What Coaching Is/Isn't	<ul style="list-style-type: none"> • Coaching is about a relationship between me (coach) and you; to create the life/career that you want. • Coaching holds you accountable to make change, your action is absolutely key. • Coaching doesn't necessarily show you anything NEW – usually we know what we need to do! But coaching can give you a very different outlook - to see the world and yourself differently. • 100% confidential • Non-judgemental • About Raising awareness within you • NOT advice/counselling/therapy 	
Our Coaching Philosophy	<p>I'm here to help you discover the hidden treasure that is already within you.</p> <p>I'm here to help you discover the hidden traps that have hindered, detoured or stopped you.</p>	
<ul style="list-style-type: none"> • Client Information • Coach/ Client Agreement 	<p>Let's go over your information. I want to make sure I have everything and that all of the information is accurate, just for my desire to make this a good experience for you.</p> <p>Let's take a look at our coach/client agreement form that I gave you to review and sign.</p>	

Intake Session Checklist

Client Name: _____ Date: _____

<p>What Coaching involves - what they should expect...</p>	<ul style="list-style-type: none"> • Explain how sessions will go/ (session structure). • Change (eg. their goals) is part of the coaching process. • Ups & Downs – are normal in coaching – • Client can decide if they want to end coaching. • Coaching Relationship is two-way confidentiality. 	
<p>Role of Coach - what Client can expect from you</p>	<ul style="list-style-type: none"> • Help work out set, clarify and maintain focus on your goals. • Hold you accountable – for what you say you’re going to do. • Help you establish your own solutions & strategies. • Encourage, support & believe in you; even when you do not! • Raise your self-awareness, CHALLENGE you and help you to recognize where you may be holding yourself back. • Set your boundaries here. Eg. returning email and phone calls within one working day. 	
<p>Role of Client - what you expect from Client</p>	<ul style="list-style-type: none"> • I expect you to be honest and open (and to tell me when you feel you can’t be). • Willing to adopt a more positive outlook on self and life. • Ready to be fully accountable for your life/decisions/actions. • Remind them: YOU are responsible for YOUR results. Success is directly related to your commitment and effort made. 	
<p>How do you want to be Coached?</p>	<ul style="list-style-type: none"> • Ask “How best can I coach you - what tips can you give me?” • What can you tell me about your learning style? 	
<p>Any questions?</p>	<ul style="list-style-type: none"> • Do you have any questions about the Coaching process? 	

3. Next Steps

	<ul style="list-style-type: none"> • I have some homework for you. This is not just busy work, but it's a couple of exercises and tools that will help me to get to know you better. 	
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--



Client Action Sheet *(Digital or Manual Log)*

Client Name: _____

No.	Session/Action	Date	Notes
1.	Introduction/Review Checklist Review Intake/ Client Information Complete Agreements Ask first 4 or 5 CARE Coaching Questions Homework: Complete the CARE-Coaching Questions		Make sure you get as much accurate information and feedback as possible. This will be very important in future documentations.
2.	Review CARE-Coaching Questions		Make note of answers you may want to address later when walking through the tools.
3.	Review CARE-Coaching Questions Homework: Personality Profile		Make note of answers you may want to address later when walking through the tools.
4.	Review: Personality Profile Explain Successful Thinking Plan Drawing Forth Personal Vision Exercise Homework: Successful Thinking Plan Complete Drawing Forth Personal Vision		Make notes how you will need to adjust your communication methods with your client.
5.	Review Successful Thinking Plan Drawing Forth Personal Vision Homework: Successful Thinking Plan Truth vs. Feeling Chart		Homework: This is a good time to bring up the negative statements and issues that came forth while working through the CARE-Coaching Questions.
6.	Review Successful Thinking Plan Truth vs. Feeling Chart Homework: Successful Thinking Plan Successful Thinking Tool		This is a good time to bring up the negative statements and issues that came forth while working through the CARE-Coaching Questions.

7.	<p>Review: Successful Thinking Plan Successful Thinking Tool</p> <p>Homework: Successful Thinking Plan Time to Dream Tool</p>		<p>Listen and be supportive.</p> <p>Make notes and recall disclosures from the Drawing forth Personal Vision Tool to help them get started with the Time to Dream Tool.</p>
8.	<p>Review: Time to Dream Tool</p> <p>Homework: Life Plan/ My Goals</p>		<p>Listen and be supportive.</p> <p>This is a good time to provide some input, wisdom and assistance in working through the exercises.</p>
9.	<p>Examine the Client's Plan</p> <p>Motivate the Client</p> <p>Homework: Make Adjustments to Plan (if necessary)</p>		<p>Be supportive.</p> <p>Continue to provide input, wisdom and assistance in working through the exercises.</p>
10.	<p>Review the Plan</p> <p>Launch the Client</p>		<p>Be supportive.</p> <p>Rehearse their journey back to them and encourage them.</p>