

# Coaching Client information sheet

Createwithlynda.com  
Coaching

Date: \_\_\_\_\_

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code or zip code: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Home number: \_\_\_\_\_ Cell #: \_\_\_\_\_

Skpe account if applicable for calls: \_\_\_\_\_

Personal email you would like me to use to forward coaching follow-up notes which are sensitive:

\_\_\_\_\_

Significant other if applicable: \_\_\_\_\_

Children: \_\_\_\_\_

Occupation: \_\_\_\_\_

Emergency contact: \_\_\_\_\_

Is there any other information that you would like me to know about you that will help us develop a coaching partnership?

\_\_\_\_\_

\_\_\_\_\_

## Release of name to the international coach federation

Your coach requests your permission to keep a confidential record of your name, phone number and email address in order to meet the requirements of credentialing by the **international coach federation (ICF)**.

These requirements include documenting the extent of coach's experience in terms of numbers of clients and numbers of hours of coaching service. This information will be submitted to ICF as part of the credentialing process and will be held within secure files of the ICF. You may be contacted by the ICF in the future to confirm that you were a client of this coach, but you will never be asked to discuss the content of your coaching sessions.

\_\_\_\_\_  
Signature indicates you agree to the above request

\_\_\_\_\_  
Date

## COACHING AGREEMENTS Integrative health

### Create with Lynda to LEARN-HEAL-LEAD

I am a Certified Professional Co-active Coach (CPOCC)

I am a Certified Creativity Coach (KMCC)

I am a Certified Lucid Living Great Story Coach

[www.createwithlynda.com](http://www.createwithlynda.com) [I.j.mcleod@shaw.ca](mailto:I.j.mcleod@shaw.ca) 250-884-3896

*I am a member of both the **International Federation of Coaching (ICF)** & **The College of Registered Nurses British Columbia (CRNBC)**. I am bound by the code of ethics from both organizations.*

The following **coaching agreements** provide a starting place for the coaching process. We may add or remove some of the agreements after discussing the document and/or as the relationship grows. This coaching agreement is between, **the coach** Lynda McLeod and the **client**\_\_\_\_\_.

This coaching agreement will begin on \_\_\_\_\_**date**. I RECOMMEND you continue for a minimum of three-months (6 sessions). The clients that commit to coaching twice a month for at least 3 months are able to shift into their **Great Story** because they are becoming more awake and aware by making a consistent commitment to themselves. The two session a month rate is **\$350 month (1 hour to 1 hour and 15 minutes long which includes coaching follow-up notes)**.

NOTE: 1 session a month \$190 a session.

The monthly fee is payable **in advance** due on the **first day** of the month. Paying in advance monthly solidifies your commitment to the process and books a space for your practice. This respects my work as your partner as well.

Furthermore, I have found that making a commitment to oneself and shifting to self-care is in itself a real CHANGE. Therefore, it is highly recommended that clients commit to a minimum of 2 coaching sessions a month for 3 months in order to push through the hard parts of doing inner work and experiencing REAL change and progress. Clients can then make an informed choice as to whether coaching is a fit for them or not. When clients terminate coaching in the messy middle unfortunately this may become part of a disempowering story.

MY ROLE is to serve you, not to please you, and say things that will make you like me. My job is to **hear** you and challenge the way you **see** the world. I will use powerful questions to expand your view and heighten your senses so that you can step into what you really want. I will be authentic, honest and real and will not hold back. I expect the same from you. I have a coach to continue my inner work so that I can be truly present with you each and every coaching session.

I truly believe you are **creative, resourceful, and whole** the answers are within you.

## The Coaching PROCESS

We can coach face to face and/or on the phone and will confirm the time just before our meeting. If we are coaching via phone you (the client) will initiate the call.

**My cell number is 250-884-3896.**

## Coaching 1:1

I facilitate deep inner work by first connecting with the client and listening beyond the words or the story. I access my creativity and intuition to design the approach within the coaching principles that will uncover blocks and present the answers that are congruent with the client's true self. Coaching is not advice, therapy or counseling.

People use the magical process of coaching to address the following normal life situations; change, transitions, overwhelm, health challenges, grief OR simply being stuck in old beliefs and repetitive stories. Or, people come to coaching to address a niggling feeling inside that **LIFE is MORE THAN THIS**. This becomes a place where coaching helps the client dig deeper and find what they really want in life and **WHO** they need to become to get there.

- **Graphic facilitation:**

I use graphic facilitation to underscore thoughts, connect ideas and highlight stories that the client expresses. Clients get to see their ideas in color facilitating their own creative process heightening transformational learning.

- **Follow-up coaching notes:**

I send a concise summary of the coaching session in a qualitative like format theming what the clients has said during the session. Clients use this document as a guide for further reflection and to acknowledgment progress.

- **Lynda's Links**

As part of the coaching process I send out quarterly emails sharing what I am reading. I am wildly passionate about creativity, holistic health, learning, neurophysiology and great story coaching. I send a quick update on what I am learning so clients can use it to inform their journey or not.

## Confidentiality

Sometimes information that is shared may be specific and explicitly personal. Your willingness to be truthful will be treated with ultimate respect, as a special confidence. **The Coach** promises **the client** that all information shared with **the coach** will be kept **strictly confidential and no identifying content will be shared**. However, I may use parts of content to demonstrate what coaching is all about when confidentiality is not compromised.

### Expectations from me

Throughout our working relationship the conversations will continue to be very direct and personal. You can count on me to be honest and straightforward, asking clarifying questions and making empowering REQUESTS.

The purpose of our interaction is to hold your focus on YOUR desired outcome and to coach you to stay clear, and in **action**.

I am committed to your transformation and will use rigorous self-management so that I can fully hold your agenda/topic and not mine. I will do this by calling it in the moment and asking for a pause to create a question to get back on track.

### Expectations from you

When you see the coaching is not working as desired, you agree to communicate and take actions to return the power to the coaching relationship. You are responsible and accountable for the commitments you make to yourself between coaching sessions. I will not be checking up on these commitments. You set the agenda and we start the coaching session each time from where you want to start. Therefore, you can not use your commitments as an excuse to not show up for coaching defaulting into a disempowering story.

Again, If the coaching process is not working I invite you to inform me in real time so that we can redesign our coaching agreements to facilitate movement forward.

### Terminating the relationship

At anytime you want to disengage from coaching, I would invite you to give me at least a week notice so I can arrange a final call so that we can terminate the coaching relationship by reflecting on your movement and celebrate your progress.

### Payment:

- To solidify your commitment to coaching **please pay for the session(s) at the first of the month**. Paying in advance monthly solidifies your commitment to the process and respect me as your coach and the space I have held for you.
- When first learning about coaching I recommend that you book at least 6 sessions so that you can experience the process of coaching and what a difference it will make to your life.
- Upon completion of the three months you can then make a more informed choice about what frequency of coaching fits with your progress and growth. The client and **Coach** agree to provide one another with a 30-day notice in the event it is desired to cancel further services.

### Cancellation policy

- We are both committed and value the coaching time we arrange **at the beginning of the month. I will send you a notification to insert in your calendar as well as a gentle reminder at the beginning of the week.** If life gets in the way for you and you or I are unable to make a session, I would appreciate it if you could give me a **24-hour notice** so I can use the space to coach another client.
- If you miss a coaching call, I will follow-up by calling you and you will forfeit your coaching session.

By signing below, you agree to keep these agreements, to regard our appointment time frames with respect, and to keep the coach informed as to what is needed to keep you moving forward.

Both our signatures on this agreement indicate full understanding and agreement with the information outlined above.

\_\_\_\_\_

Client

\_\_\_\_\_

Date

\_\_\_\_\_

Coach

\_\_\_\_\_

Date