



Engagement Agreement

The Client/Coach Relationship: What to Expect

Welcome! I am excited about working together! It's important to understand the coaching relationship so that it works well for you.

As your coach I am committed to you and your best interests. I will give you my undivided attention, ask the hard questions and reflect back to you what I hear. I will challenge you and encourage you to explore new avenues. The people I work with are ready, willing and able to make changes. Finding and communicating your truth is an essential element in the coaching relationship. Clarity is paramount. Your truth is safe. No vision is too big. I am here for *you*.

Coaching is never to be confused with therapy. If I sense that there are problems that are preventing you from moving forward and counseling seems appropriate, I will tell you that. If a professional therapist is currently engaged, I will defer to their determination if and when I become your life coach.

My strengths in helping you are in quickly getting to the heart of an issue, creative reflection, practical strategies and energizing motivation. I strive to help my clients not only achieve what they set out to do, but also increase self-awareness and attain a healthy balance in life.

You set the agenda of our calls. I will make requests of you. It is your option to accept or reject those requests, or modify them to make them work better for you. My guarantee to you is that what I say I will do. The action is up to you.

If there is a lack of clarity over any issue, question it immediately. I will not tiptoe around issues. I am direct, but I will always be respectful of you in making an observation. I will often ask you to explore ideas that may be beneficial, but I will not tell you what to do. I will support you in deciding your best course of action. As your coach, I am a resource and a presence.

I encourage you to make a serious commitment to coaching, and provide yourself with adequate time to progress. Coaching is an investment in yourself. The benefits multiply themselves for a lifetime.

Coaching Options:

- **Monthly by Conference Call Line:** Coaching on the telephone, bi-monthly, at a pre-scheduled time. Your monthly fee includes two (2) forty-five minute sessions, and contact by e-mail. It is reasonable to work together for at least 3 months in order to see measurable results, however our agreement is open ended. It is your responsibility to call me at the pre-arranged time. See fee options below.
- **Just in Time Coaching:** Sometimes called 'spot coaching'. This is billed separately for specific problem solving issues as they come up and does not include regularly scheduled calls. These calls are scheduled one at a time.
- **3. Face to Face:** For those in the Tulsa metro area, person to person coaching is an option. Special arrangements are made for businesses and groups. Face to face coaching can be arranged in specific blocks of time in other geographical areas. Request a quote.
- **4. Group Coaching:** Group coaching is never a substitute for individual work but can be an effective alternative, particularly for those who want a group experience covering specific topics. Groups work well when working with work or church leadership groups with set curriculum on management and leadership, or Your One Degree for teams. When individual coaching is cost prohibitive group coaching is an option. Nevertheless, there is strength in numbers, and group coaching can bring about significant benefits. While there is support in such a group, it

should not to be confused with a support group. Groups meet for one hour, typically twice a month and have access by email between sessions. An agreement to confidentiality and session focus is required.

Affinity groups are typically not related organizationally, but have similar interests and desire for growth. They are not on-going. Therefore, they may take some time to set up.

Call Procedures

- Prior to each coaching session I ask that each participant complete and forward a Session Prep Form. All forms are PDF fill-in forms and are posted on-line at the Client Portal on the right side of the overhead tab. Complete each blank form from your computer, iPad or mobile phone. Follow instructions to save and send. I will receive your completed form via email. You will also receive an email copy for your records. This applies to both individual and group coaching clients. The prep forms allow me to be as prepared as possible to make the best use of our time, and enables clients to have direct input into upcoming session.
- Calls are made through a conference call line, not a direct phone call. This allows for group calls as well as individual coaching calls. All calls are recorded and are available for later review by both coach and client. It also allows me to review and improve coaching opportunities and skills for future calls. The conference call line is the following: **641-715-3660**. When requested use participant code **404954#**.
- Scheduled sessions will begin **on time** and **end on time**. We will schedule each session at times that will work for both of us. I am available daytimes and some evenings.
- Please allow 45-60 minutes per session.

Policies and Procedures

FEES

Because I work with a variety of clients involving various levels of coaching, several fee schedules are available for individuals. Clients may move between the various levels as circumstances dictate.

STANDARD RATE: \$200.00 per month for two 45 minute scheduled sessions by conference call with file sharing capability. Client has unlimited access by email between sessions. Typical engagement is three months.

FACE TO FACE: \$300 per month. Restricted to Tulsa metro area only. Other locations, request a quote.

After the initial Three Month commitment to Your Coaching Relationship, the following options are available for you.

- **Option 1:** Two (2) 45-minute coaching sessions, e-mail and spot calls at \$180 per month.
- **Option 2:** One (1) 45-minute coaching session, e-mail and spot calls at \$100 per month.
- **Option 3:** One (1) My Coach on Call Retainer, Email and up to two 30 minute calls at \$150 per month. Four months minimum.
- **Other:** Temperament/Strengths Assessments such as Uniquely You are paid for separately at the time you take the assessment – typically on-line. Custom Workshops, speaking at Retreats and other Events, etc. are priced separately. Request a quote.

No future commitment beyond your initial three month engagement is required at this time.

GROUP COACHING FOR LEADERSHIP TEAMS AND AFFINITY GROUPS

Minimum group size is three participants – maximum eight, meeting together on a telephone conference call line and contact by e-mail. The cost is **\$100 per person, per month**. All participants must be coachable and agree to a three-month commitment.

Payment Policies:

Advance payment

Advance payment is due prior to your first coaching session and is payable monthly, in advance. Pre-payment will allow us to focus on your coaching instead of administrative details. Paying by credit or debit card, proves to be the most convenient for all. Visa, Mastercard and American Express are accepted. The charge for coaching services shows up on your credit card statement as “Lifequestcoaching.” Payments can be made by going to RodGiles.com, opening the Client Portal tab at the right of the overhead menu and clicking on the “**Make A Payment**” selection. Transactions are processed by PayPal and are safe and secure. Your PayPal email report of payment will serve as your receipt.

Automatic Recurring Charges will be processed on the first of each month, usually a few days prior to the session in that billing period and charged monthly for the duration of the agreed term. If you need to re-schedule your appointment, a 48 hours’ notice is required. If you have an emergency, we’ll work with it. Otherwise, the time has been set aside for you and is charged for. If your circumstances change and you interrupt coaching services for a time, any credit will be carried on your account so you can return when timing is better for you.

If you have a strong preference to make payment by check, please allow plenty of time for the post office and posting to your account. Mail can cross the country anywhere from 2 to 12 days!

When it’s time to move on and discontinue coaching, fourteen days’ notice is required.

Code of Ethics: I acknowledge and agree to honor the International Coach Federation Code of Ethics (www.coachfederation.org) re: professional conduct, confidentiality, and conflicts of interest.

Problems/Praises: Our relationship needs to be based on absolute honesty with each other. If at any time you are dissatisfied with something, please bring it up. I will work with you to resolve any difficulties. By the same token, if you are satisfied, please let me know that, too, and pass it on!

Follow-through: It is very important that you apply yourself before, during and after our calls to be the most successful. Our work will sometimes be very purposeful, goal directed. Other times it will be very broad in scope, requiring time reflecting on applications in your life. **Real growth will come from the work you do between coaching sessions. Please be sure of your personal commitment to fully participate before you agree to a coaching relationship.**

Personal Information

Please complete, sign where indicated, and then click Submit at top right of page.
You will receive an e-mail copy upon submission.

Name: _____

Mailing Address _____

City _____ State _____ Zip _____

Preferred Phone Contact: _____

Preferred Means of Contact:

Preferred Telephone: _____

Email: _____

Text to: _____

Other: _____

I confirm that I have read the above engagement agreement guide lines and agree to abide by the policies and procedures. As a coaching client, I understand and agree that I am fully responsible for my own choices, decisions, and wellbeing during my time of coaching. No guarantees have been made as to the expected outcome of my coaching. I am aware that either my coach or I can choose to discontinue coaching at any time (30-day notice appreciated). I recognize that coaching is not psychotherapy and that professional referrals may be offered if it appears they are needed. I also give permission for my coach to submit a confidential record of my name, contact info, and documentation of my coaching hours for the express purpose of meeting requirements for credentialing by the International Coach Federation (ICF) and Christian Coaches Network (CCN) in accordance with the ICF Code of Ethics.

I acknowledge that I have read, understand and agree to honor the above policies and procedures in working with my coach. Your name below is deemed a bona-fide signature of agreement.

Signature

Date