

CLIENT SERVICES AGREEMENT (TEMPLATE)

Disclaimer: This template is for informational purposes only and does not constitute legal advice.

This Agreement is entered into by and between: **[Coach Name], [Coach Company Name]** (“Coach”) and **[Client Name]** (“Client”) whereby Coach agrees to provide coaching for Client.

Thank you for choosing us. Your coach will be **[Coach Name]**. Please be familiar with our policies and procedures.

COACHING PHILOSOPHY and SCOPE OF SERVICES

The purpose of our coaching engagement is for the Client to make positive changes in their way of working and way of life. Coaching is not only about skill development; it’s a deeply personal and transformative experience. That’s why I believe that the role of a coach should be to guide clients on a learning journey — a thought-provoking, creative partnership that helps you awaken their personal best through self-discovery, overcoming limiting beliefs, and tuning into the guidance within.

The scope of our partnership may include the following services (include all that apply):

- One __-minute **Set Up Call**
- __-minute **coaching sessions** (quantity: ____)
- Leadership style interview(s)** with Client (quantity: ____)
- Personal lifestyle interview(s)** with Client (quantity: ____)
- Online **360 survey** (up to ____ respondents; includes up to ____ open-ended questions)
- Interviews with contacts in Client’s personal life (quantity: ____)
- Feedback & Clarity** session (duration: ____ ; location: virtual in person: _____)
- Goal Setting & Action Planning** session (duration: ____ ; location: virtual in person)
- Joint meeting with Client’s supervisor/other (in person phone/video), upon Client’s request
- Email support between sessions (details____)
- Brief check-in calls between sessions (__ minutes, as available)

Other:

SCHEDULING & AVAILABILITY

[Coach Name] typically takes appointments from **[Hours]** **[Days of Week]**. We will make every effort to schedule interviews and sessions in a timely manner.

We will try our best to accommodate rescheduling requests. Clients may cancel or reschedule their appointment up to 24 hours before the scheduled appointment. Please note that we may not be able to reschedule with shorter notice than that, and the Client may lose the session.

You'll see in the Scope of Services that the duration of some sessions is expressed as a range. That is to ensure we have plenty of time to do the work we need to do while being mindful of your calendar. We will block off plenty of time but use only what you need. Similarly, you can expect breaks during longer sessions. These are strategically timed and designed to optimize your learning.

EXTRA TIME

[Coach Name]'s policy: I will have some time between our scheduled meetings to speak with you, and I enjoy providing this extra level of service. I do not bill for additional time of this type, but I ask that you keep the extra calls to __ minutes each or keep me posted via e-mail. I can offer this on an availability basis. Sometimes I will not be available.

CONFIDENTIALITY & NON-DISCLOSURE

All data generated in the course of this process will be treated as confidential and will be "owned" by the Client alone. It is up to them to decide which data to share and in what form.

Data will be stored on **[Storage System]**. We may publish anecdotes from client work in service of helping others in similar situations. We will never include any personally identifying information.

In addition, the Coach agrees to keep confidential and not disclose to third parties any information we learn about the Client as part of this process.

COACH'S AGREEMENT

As your coach, I cannot guarantee results. You will create powerful results by having the courage and determination to forward the action in your life.

I am trained as a coach, not as a psychotherapist or physician, and I am not trained in diagnosing psychological or medical conditions. If any issues come up for you that should be handled by a licensed therapist or physician, I will insist that you attend to your health by contacting the appropriate professional.

As your coach, I will bring attentive listening, understanding, belief in you, and commitment to your success. You can expect me to challenge you, offer fresh perspectives, make requests, acknowledge your wins, and guarantee the utmost confidentiality in this powerful relationship.

I value honesty in our relationship. If at any time I say or do something that doesn't feel right, please bring it up. We will work as a team. I value truth and expect you to tell me if I overstep any boundaries.

Signature of Coach _____ **Date** _____

CLIENT AGREEMENT

I am motivated and committed to taking action toward my personal and professional goals. I realize that anything less than my intentional full participation will not lead to my success.

I accept full responsibility for myself and any actions I take that might result from coaching.

Coaching services offered under the coaching agreement are of a specific and limited type: these services include in-person or telephone coaching and in some cases electronic mail interactions.

Coaching services are not to be construed as, or as replacement for: management consulting, financial advice, legal counsel, medical advice, psychotherapy, or divine wisdom. Action plans created in the context of the coaching are solely the client's responsibility and the coach assumes no liability for any direct or indirect outcome. Coaching is a partnership for the client's success; the client remains 100% responsible for his/her decisions, actions, outcomes and life.

Please fill in this form and return it via email before your Set Up call with your coach at [Coach Email].

I have read and agree to the above terms.

Signature of Client _____ **Date** _____