

Dear Client,

Welcome! I look forward to collaborating with you to reach your vision and goals for this stage of your life and career. We will engage in [number of sessions, time-length of sessions] coaching sessions as requested, and you also have access to me via email between coaching sessions to share “wins,” updates or quick strategies or ideas.

This is our welcome package. Please take a look, and at your earliest opportunity, please complete and return the attached forms. Once you return the coaching agreement and client information form, I will reach out to schedule your first session. Please return the remaining forms before our first session. Not only will this information help me better serve you, but thoughtfully answering the questions will help you gain better clarity about where you are and what you want most from our coaching together. Send the following to me via email at manninghazel@gmail.com:

- Client Information Form
- Coaching Agreement
- Client History
- Coaching call agenda

You will also receive, via email, a copy of the Code of Ethics, which are standards to which I adhere and take seriously, as well as a “State of Your Life” assessment. You may use this to gauge topics and issues you want to address as you build a foundation to move towards your vision. I have other worksheets and tools available, depending on your needs. Some clients enjoy these types of tools, while others never use them. We all have different styles, and I will honour your learning and coaching style. I will send them if you request them, but do not want to bombard you with too much information!

If you have questions prior to our session, please feel free to call me. Thank you for the privilege of serving as your coach.

Your Coach,

Hazel Manning

Certified Maxwell Performance Coach
Coaching Masters Academy
International Coaching Federation

Coaching Client Information Form

I am delighted to be your coach. I look forward to being your partner as you identify and move towards your vision. You really can have, be, and do exactly what you want, and we will put a structure in place to make it happen. Welcome to my practice!

Please take some time to enjoy the reflection process that follows. Enter your responses into this form, then attach it to an e-mail and send it to me at manninghazel@gmail.com.

About You

First Name		Last Name	
Address		City	
State/Province		Postal Code	
Country		Company	
Title		Home Phone	
Work Phone		Work Extension	
Mobile Phone			
Email		2nd Email	
Occupation		Who Referred You?	
Birthday		Married?	
Religious affiliation, if any		Spouse/significant other name	
Anniversary, if any		Children? Names and ages	

What are the two biggest changes you want to make in your life in the next three months?

What are the three biggest changes you want to make in your life over the next three years?

What do you most want to achieve during our initial coaching period? What most threatens to hold you back from achieving this desire?

Coaching Agreement

COACHING AGREEMENT WITH _____

Please review, sign where indicated, and return it to us. Putting this in writing strengthens your dedication.

Client Name _____

How We Will Meet

We will meet on our LMS platform weekly based on the number of sessions you select. I am also available as often as you need me for email coaching between sessions. You may find it helpful to email me your coaching call agenda for the call before our session. This will give you time to clarify what you most want to focus on.

Coaching Fee:

Payment _____.

Changes/Cancellations

I request that you make our coaching sessions a priority. In the event that you need to reschedule, please let me know at least 24 hours in advance. Likewise, I may also need to reschedule a session on occasion. I will give you as much notice as possible and try to make rescheduling as convenient as possible.

Initial Coaching Period

The benefits of coaching build over time. To make this experience as valuable as possible, I have created a minimum coaching period of three months with all of my clients. I recommend six to twelve months to establish longer-term support as you make major transitions and changes in your personal and professional life. After the initial period, you may extend it as long and as often as you like. My clients often stay with me long past our initial coaching period. Since I limit my private coaching practice to a small number of inspiring clients, most of whom continue coaching for an extended period, my practice is full, and there is a waiting list for new clients. If you stop coaching and decide later to come back, we will do our best to accommodate your request by giving you a "preferred client" status on the list. The waiting period varies, and we'll gladly

discuss it further with you should the need arise. Your coaching time slot is a “reservation” on my calendar, a committed time period that I dedicate to you and your goals.

Confidentiality

It is essential to our coaching relationship that you can be open and share honestly. Our conversations are entirely confidential unless the release of information is otherwise authorised or requested by you, you have indicated you plan to do harm to yourself or others, or the release of information is required by law.

Coaching vs. Counseling

It is important to me that you have clarity about the difference between coaching and other types of professional services such as therapy or counselling, consulting and mentoring. Coaching focuses on where you are at present and where you are headed, with the goal of helping you gain clarity about your vision, eliminate obstacles to your success, accelerate the pace of personal growth and achieve results that empower you to live your best life – professionally and personally. We can focus on any area of your life: Relationships, Finances, Spiritual Life, Work and Business, or Physical Health and Environments.

While coaching is forward-focused, counselling tends to deal more with past issues in which you may find yourself stuck and struggling. We may occasionally discuss something that has occurred in the past for the purpose of clarifying the present, but your coaching will not focus on resolving the past. A simple rule of thumb to know whether you should be coaching or counselling: If your past is an issue, counselling is your best option. If your past is simply a fact (regardless of whether the circumstances were difficult or negative), you are probably ready for coaching. If it appears that there is an issue for which you may need counselling, I will suggest it. With the support of a counsellor or therapist, some individuals choose to engage in coaching and counselling simultaneously but with a focus on different areas of life for each service.

Coaching vs. Consulting

A coach focuses on helping you walk your unique path to success. As the client, you are responsible for the results you receive from coaching. I help you discover how to become more of whom you need to be to achieve those results and identify what you may need to do differently. A consultant takes responsibility for a specific project, acting as a specialist*, providing specific deliverables and knowledge. I believe in your ability to fully experience your potential and will provide a safe, consistent space for you to develop your potential.

* If my professional experience (in the areas of marketing, public relations, entrepreneurship and publishing) is of benefit to you personally and professionally, I will use that knowledge in the

context of the coaching session. Additionally, if it is not a good fit, we may discuss a separate consulting engagement to serve your specific needs.

Coaching vs. Mentoring

As a coach, I focus on the development of people in general and the development of your unique path in particular. A mentor guides you towards a specific path of development. I am more interested in helping you onto the unique and divinely-ordained path that is meant for you – which may be quite different from the path I have taken, even though the purpose of our paths may be very similar. My job as your coach is not to tell you what to do but to help you uncover the answers within you. Consider me a catalyst for your success.

Thank you

It is a joy and a pleasure to serve as your coach. Thank you for entrusting me with the opportunity to support you in this unique way as you take on new challenges, changes and developments on your path.

Client signature_____Date -	

Client Name	
Coach signature _____ Date	

Once you return this signed agreement via email for your first month of coaching services, you will be prompted to schedule your first sessions.

Coaching Client History

As your coach, it is helpful for us to learn more about you to better support, encourage and challenge you as you move towards your ideal life. Please review and answer these questions and return them to me at your earliest opportunity.

Thank you.

1. What have been your three most fulfilling accomplishments in life thus far?

2. What was the biggest obstacle you have had to overcome?

3. How strong/powerful/healthy have your past personal or business role models been?

4. How have you failed, and how has that affected the way you think and act today?

5. Have you worked with a coach before? What worked? What did not work?

6. What has made you the most successful or powerful?

7. How would those closest to you describe your greatest strength?

8. Do you have any mental health challenges that have affected you? Tell me about that.

9. What should I know about your professional background or history?

10. What should I know about your personal background or family history?

Coaching Call Prep Form

Please email your responses to me at manninghazel@gmail.com at least 1-12 hours before each scheduled session. Taking just a few minutes to answer these questions before each session will help you organise and focus your coaching time to get the most out of our time together.

My Name:

My phone number:

My email address:

Coach, I will call you for our coaching session on the following scheduled date/time:

Date/Time/Time Zone:

This week, I'm most grateful for:

The "win" I most want to acknowledge this week is:

The actions I committed to from my previous session were:

My progress and results on those actions are:

What I learned since the last session:

In order of priority, during this coaching session from you, I want:

1.

2.

3.

You should know today that:

The opportunities I am facing:

The challenges I am facing:

The one question I hope you won't ask me:

Actions I am procrastinating about:
