Welcome! I want to acknowledge you for taking this step towards creating a joyful and fulfilling life. I’m really looking forward to the fun and transformative journey we’re beginning. As promised, I'm enclosing the coaching welcome packet.

This welcome packet includes the following items:

* Client Profile and Client Profile Questions
* Financial Agreement and Life Coaching Waiver
* Policies and Procedures Agreement

When you're finished, email me what you've written. We’ll go over this during your introductory session. Previous clients have found that the questions take some reflection, so you may want to give yourself an hour or so to answer the questions.

I've also enclosed an article written by the founder of modern coaching, Thomas Leonard: "What to Talk About With Your Coach", as well as a "Client Prep Form" with suggestions on how to get the most out of your coaching sessions – we'll ease you into using the form to prepare for our sessions, so don't feel pressured to do so right away. Finally, I've enclosed several pages that describe how I work with clients. All of these should give you a better idea of how coaching works. Please let me know if you have any questions.

Sincerely,

Caitlin

Client profile

All personal information is confidential and treated appropriately

|  |  |
| --- | --- |
| Name |  |
| E-mail |  |
| Home phone |  |
| Cell phone |  |
| Work phone |  |
| Fax |  |
| Home address |  |
| Occupation/title |  |
| Employer |  |
| Work address |  |
| Work phone |  |
| Date of birth |  |
| Marital status |  |
| Partner’s name |  |
| Children’s names/ages |  |

Client profile questions

Take some time to respond to the questions below. The purpose of these questions is for me to learn more about you. They are also meant for you to begin to define some of the things you’d like for us to explore during our time together. The questions are by no means comprehensive, but they’ll get us started. Don’t think too hard, but answer from the place inside of you that *knows*. Make space for yourself. Look at the experience of answering these questions as time that you’re devoting to creating a joyful, fulfilling life.

**Beginning the coaching journey**

1. What is motivating you to begin CoreBirthing Coaching now?
2. For you to be successful in this process, what will you need most from me? What end result are you seeking?
3. What aspects of this process bring up the most fear for you?
4. What are you most excited about?
5. How might you sabotage your progress?
6. What will you have to give up in order to get the most from this program? Think about habits, beliefs, behaviors, thoughts, patterns, etc.

**You and your vision**

1. What inspires you? What are you passionate about?
2. What do you consider your life’s purpose or mission? How do you nurture that calling?
3. What five life accomplishments are you most proud of?
4. What would a joyful, heart-centered, fulfilling life look like for you?
5. What are the three biggest obstacles to your having this life?
6. What three things would you need to change about the way you are being to have that life?
7. Choose one to two goals you want to focus on in our next 60 days of this process – what you want for you and your business. Secondly, what is the FEELING you will have when you have this? Lastly, why do you want it? (Tell me all the reasons why even if they seem obvious.)
8. Imagine that it is a year from today, and you are deliriously happy with the inner and outer results of your coaching journey. Describe those results and how your life now appears to you:
9. Were there any challenges along the way and how did you overcome them?
10. What changed in you?
11. What changed in others as they relate to you?
12. What changes occurred in your work, body, health, feelings?
13. How have you changed overall?
14. How has your business changed?

**Anything else you want to share with me?**

Financial and life coaching agreement

Please sign and date this form, then email a PDF version to me BEFORE our first coaching call. It’s important that I have this before we begin coaching together.

**Today’s date:**

3/15/13

**Your name:**

Emmeline Chang

**Services**:

CoreBirthing coaching

**Terms:**

6 month coaching program

**Rate structure:**

barter

**Start date:**

3/15/2013

**Our agreement:**

1. *Client calls for session at the scheduled time.*

2. Coach will be thorough, helpful and direct, with a supportive touch.

3. *Client and Coach agree to abide by the Coaching Policies and Procedures as listed.*

The client further agrees: I hereby employ Caitlin FitzGordon as a Life Coach. The Client understands and Caitlin FitzGordon agrees that she is not an employment agent, a business manager, a financial analyst, or a psychotherapist, and that she has not promised, shall not be obligated to and will not: (1) procure or attempt to procure any employment, business or sales for the Client; (2) perform any business management functions such as accounting services, tax or investment counseling; or (3) act as a therapist, providing psychological counseling, psychoanalysis or behavioral therapy. The Client further understands that as a specialized form of consulting, Life-Coaching is not the same as professional or licensed therapy; and that the Client is always free to reject any advice, suggestions or requests made by the Coach at any time.

**PROFESSIONAL COACH ACCREDITATION CERTIFICATION:**

As part of the coach’s ongoing professional development, the hours for these sessions will count towards professional development and further professional coaching accreditation and certification.  By signing this agreement, you agree to allow the coaching hours and your contact details to be provided to the CoachInc.com (Coach U or Corporate Coach U) or the International Coach Federation (ICF), to meet the requirements to become an ICF Accredited Coach.  These organizations handle all information with the highest regard towards confidentiality.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Above agreed to by |  |  | On |  |
|  | (Client's signature) |  |  | (Date) |
| And by |  |  | On |  |
|  | (Coach's signature) |  |  | (Date) |

Policies & procedures

I want you to be familiar with the structure of CoreBirthing coaching so that our time together is positive, productive and energized. **Please read these very carefully so that there are no misunderstandings later on.**

**Length of time together:** You have signed up for a [3-month] coaching program. This is a good amount of time to really make the solid changes you want. Our time together will help you discover things about yourself--and give you the support to bring those discoveries into your life.

Typically, a person can struggle with personal transformation and business concerns their whole life. Virtually all of my clients enjoy a substantial (sometimes *dramatic*) improvement in their business and life within a few short months. Just know that it may take you a number of months to solidly put all of the changes in place; I want to acknowledge you for planning for it.

**Before coaching calls:** At the time of our calls, please **call me at 347-702-9649.** Please call from a quiet place to concentrate on our work together. (Try not to eat or do anything else during our sessions. You won’t get as much value.) Please be on time.

**Between sessions:** It is normal to have questions and concerns between sessions. My intention with all of our work is to have you become more and more self-generating in your own healing and business expansion. I ask that you use inner awareness and self-coaching before contacting me between sessions. If you find you are still feeling stuck or unclear and feel it cannot wait until our next session, then please email me. Barring weekends, holidays and vacations, I will answer all email within 48 hours.

**Coaching call prep form**: I highly recommend that you use this form. Clients who have used this form consistently have found their goals to come to fruition more quickly than they anticipated. Please email the form to [caitlinfitzgordon@gmail.com](mailto:caitlinfitzgordon@gmail.com) at least 24 hours before your scheduled call.

**Call waiting:** If you have Call Waiting, please disable it before your call, usually by dialing \*70 before you dial the number you are calling. It disables itself when you hang up.

**Vacation:** **You will always be notified when I have a vacation scheduled.** Please also let me know if you plan to be away for an extended period of time.

**Schedule changes:** I want the very best experience for you. **Please try not to reschedule your appointment**. If an extremely unusual situation occurs and you need to reschedule, please give me a lot of advance notice. As with any professional service business, **the session will not be rescheduled if missed without a 24-hour notice**. If you arrive later than the scheduled time, the session will still end at the originally designated finish time, as I have clients scheduled before and after your session. If it’s a true emergency, we will work around it.

**Confidentiality:** I recognize that you may have the following: future plans, business affairs, financial information, job information, goals, personal information and other important information. I will not, at any time, either directly or indirectly, use any information for my own benefit, disclose, or communicate, in any manner, any information to any third party.

**Referral exchanges:** Many times in my coaching practice, I’ve had the opportunity to give clients information about another service that may be of help to them and I’m absolutely *thrilled* to do it. This happens often because I get to know a client’s lifestyle and business situation intimately and become keenly aware of what their needs are. **On the flip side, my clients regularly send referrals to my practice too.** Being a referral-based business actually allows me to serve my clients better because not having to prospect for clients gives me more time and energy to focus on my clients and their needs. If you know someone who could use help achieving their visions with ease or who would like more joy and fulfillment in their lives, please ask them to contact me for a chat, free of charge, to see if I can help their situation.

**Early closure:** If Coach feels that working together is not benefiting Client, or if Client is not following through with recommendations provided by the Coach, the Coach may close the coaching relationship at any time upon five (5) days written notice to the Client. The termination of partnership notice will be mailed, faxed, or emailed. Any fees that Client has already paid for future coaching will be refunded based on a pro-rated basis per week of unused time. In the event Client owes any fees to the Coach at the time of termination, Client will pay them immediately within ten (10) days of termination.

If Client elects to terminate the coaching relationship, Client should notify the Coach via mail, fax or email. If Client has not paid his/her coaching fee in full by that point, the Client owes the Coach the rest of all fees promised within the following ten (10) days of termination.

**Resolution:** If not resolved first by good-faith negotiation between the parties, every controversy or dispute relating to this Agreement will be submitted to the American Arbitration Association. The arbitration shall occur within ninety (90) days from the date of the initial arbitration demand. The parties shall cooperate with each other to ensure that the arbitration process is completed within the ninety (90) day period. The parties shall cooperate in exchanging and expediting discovery as part of the arbitration process. The written decision of the arbitrators (which will provide for the payment of costs) will be absolutely binding and conclusive and not subject to judicial review, and may be entered and enforced in any court of proper jurisdiction, either as a judgment of law or a decree in equity, as circumstances may indicate. In disputes involving unpaid balances on behalf of Client, Client is responsible for any and all arbitration and attorney fees.

**Miscellaneous:** This Agreement shall be binding upon and inure to the benefit of the parties hereto, their respective heirs, executors, administrators, successors and permitted assigns. Waiver of any breach or the failure to enforce any provision hereof shall not constitute a waiver of that or any other provision in any other circumstance.

This Agreement constitutes and contains the entire agreement between the parties with respect to its subject matter, supersedes all previous discussions, negotiations, proposals, agreements and understandings between them relating to such subject matter, and may not be modified, amended, or discharged, nor may any of its terms be waived, except by an instrument in writing signed by both parties in duplicate.

This Agreement shall be governed by and construed in accordance with the laws of the State of New York, United States of America. This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, and all of which, together, will constitute one and the same instrument. The parties hereto have caused this Agreement to be executed and delivered as of the date first above written.

**I understand I am committing to paying the complete above stated amount, as this is a comprehensive program I am enrolling in.**

**This is a morally and legally binding agreement. Payments are non-refundable. A $50 late fee will be charged for payment not received, or unable to be processed, by each installment due date.**

* I understand that if, for any reason, I do not make a full and complete payment, then I will no longer be eligible for this payment plan and I will be fully responsible for the total sum plus 10% interest, immediately.
* I understand I will be responsible for any legal fees which may arise and any expenses which may be incurred by Emmeline Chang in efforts to obtain full payment, if I fail to meet the conditions of this Agreement.

Above agreed to by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

on (Date) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is coaching?

Congratulations for embarking on this journey! I look forward to working together and supporting you in achieving whatever it is you really want. This document is designed to help you understand the nature of coaching and how to get the most from our partnership.

**What is coaching?**

Coaching is a conversation that we undertake with a specific goal: joy and fulfillment in your life, and the achievement of your visions. Coaching is quickly becoming one of the leading tools that successful people use to live extraordinary lives. Through weekly coaching sessions, my clients identify what is most important to them and align their thoughts, words, and actions accordingly. As your coach, I work with you to identify what you want personally and professionally, and support you in achieving a life that you really want and love. Having a life you love starts with gaining clarity on your values, enabling more meaningful choices and consistent action. Your commitment to your life through coaching offers a means for more balance, joy, intimacy, energy, financial abundance, focus, and action in every area of your life.

**As your coach I will**

1. Help you discover what you value and want more of in your life
2. Encourage you to set goals that support that vision
3. Ask you to do more than you may have done on your own
4. Help you focus better in order to produce results more quickly
5. Provide you with the tools, support, and structure to create your best life

**How is coaching different from therapy or consulting?**

Coaching is not therapy, which goes into depth about various issues, usually dealing with the past, nor is it consulting, which generally focuses on giving the client answers. Coaching is more action-oriented and focuses primarily on the present and future. As your coach, I enable you to determine your own “answers” through the work done in our coaching partnership.

**Who works with a coach?**

Entrepreneurs, people in transition, people wanting a higher quality of life, business owners and professionals are some of the people who typically work with a coach. Regardless of their professional endeavor or place in life, all of my clients have one thing in common: they are all successful, resourceful, and intelligent individuals who want to get even more out of their lives.

What professional athlete hasn’t used a coach to win? Tiger Woods is already one of the best, and yet he understands the value that comes from having someone work directly with him, someone to point out things he can’t see, someone to keep encouraging and challenging him to achieve his greatest potential. That’s who I am for you!

Benefits of working with a coach

**Coaching is proven to work when two factors are present:**

1. The client is willing to learn, grow, and take action
2. There is a gap between where he/she is now and where he/she wants to be

That’s all that is necessary for a successful coaching relationship where you can develop the right strategy, implement a plan of action, and achieve your goals.

***Anything is possible within our coaching relationship. With a coach you can:***

**Take more, better, and smarter actions**

Our first task together is to find out exactly what you really want for yourself. Once you create objectives that are clearly in line with your personal values and professional vision, you are much more likely to naturally and consistently take actions to reach them.

**Have a balanced life—and a life that works for you**

Professional success is maximized when you enjoy a sense of personal fulfillment and life balance. We will discuss how to be selfish yet responsible, and how to carve out enough time so your life outside of work is exactly the way you want it to be.

**Make better decisions**

I will help you become focused as you share ideas with me. I will understand you and be subjective enough to want a lot for you, yet objective enough not to be biased or self-serving. You’ll also find that just talking about your options with someone who really listens is often enough to clarify things.

**Reach for more—much more**

When you have a partner you trust, you will reach for much more because you can afford to. Are you ready to think big and really live your life fully? I am a partner who will enable you to take your life wherever you want it to go.

**Make and keep more money**

Most people are worth a lot more than they are making. Are you happy with your financial situation? If not, we can look at your beliefs about money and address whatever is keeping you from experiencing financial abundance.

**Have more sustainable energy**

Together we’ll identify the things that drain your energy, and create a long-term strategy to eliminate them. In addition, we’ll focus on the things that give you energy, and explore how to maximize their impact. When you're happy, productive, and free from tolerations and problems, life is a lot more fun!

How I coach clients

As your coach, I will inquire, encourage, advise, challenge, make requests, and listen for your truth so that you remain aligned with who you are, your goals, your values, and your vision. My focus will be completely on you and what you want in life; I stand for you first and foremost, not just your goals.

The coaching relationship is designed by both of us, and may be refined through ongoing two-way feedback. Even though I am committed to the journey, you will ultimately be responsible for actions taken (or not taken) in your life throughout the process.

**I expect your best**

If you are hiring me, then you're probably ready to do and be your best. And if you aren't doing your best, I will ask you to do so. If you can't do that at the moment, I will understand and do what is necessary for you to feel heard, supported, and helped back onto your path.

**I ask probing questions**

I will ask questions to help you explore your thoughts, feelings, values, and desires—and to connect more deeply with what you truly want for your life. You will benefit most if you look at each question with genuine curiosity and stay open to new possibilities, opportunities, ways of being, and solutions.

**I make specific requests**

From time to time, I will make a direct request, such as "Will you accomplish X by the end of the month?” You may accept the request, counter-offer (e.g.: “I can’t do X, but I can do Y”) or decline (rare). I will always support you, whichever way you respond.

**I give direct advice**

If I am sure of the situation, and you're open to it, I will make specific suggestions on how to handle a problem or "go for" an opportunity. If I am not sure, I will say so. Mutual honesty is important to me; I am direct and expect the same from you. Regardless, use what resonates best for you and use your own judgment.

**I am direct**

When I hear a funny tone in your voice or notice something amiss, I will ask you about it. Often, it is these small moments that offer the chance to resolve something. However, I will not confront you; I will merely invite you to take a closer look.

**I give “homework”**

I typically ask you to determine two or three goals or actions to focus on between our sessions. If I am pushing you too much, say so. If you want to be pushed harder, just ask.

How to get the most from coaching

I want you to benefit greatly from our coaching sessions and the time in between. This guide briefly outlines some of the things you can do to maximize the value of your coaching experience.

**Focus on what you really want**

Coaching works best when you have clear goals that are based on your true values. First, I encourage you to deeply consider what you want your life to look like. Then, identify the gaps between the way things are now and how you would like them to be. Many people struggle with this, so if you are unsure about what it is you really want to achieve, coaching is an excellent tool that can provide you with greater clarity.

**Get to know yourself**

Working with a coach is a healthy way to deepen your life. Many clients hire a coach to work on specific goals, and much of the time focus on these objectives. Yet, with coaching, many clients also discover new parts of themselves. These discoveries often lead to adjusting their goals to be more in alignment with who they really are. This discovery process is natural, and you do not need to concentrate on it, just realize it will likely happen. Accelerated personal and professional growth is the hallmark of coaching.

**Double your level of willingness**

Part of working with me as your coach is that I will ask a lot of you. Not too much I hope, but perhaps more than you may have been asked recently. I request that you be willing to experiment with fresh approaches and try on new beliefs. I will invite you to tell the absolute truth, raise your personal standards, and set higher goals. Ultimately, you need to decide what is best for you; however, the more willing you are to grow, the greater the benefits from coaching.

**Come prepared to each coaching session**

To get the most value out of the coaching session, I request that you prepare a written agenda for each session. Many of my clients use the provided “Coaching Prep Form.” This does not have to be a big, time-consuming event, but usually only requires 10-20 minutes. Investing that small amount of time to prepare for the call and e-mailing an agenda to me beforehand, will have a huge impact on our session.

**Do your homework**

Each week you will decide on the actions or goals you want to focus on. It is important to keep the commitments you make and I will work with you to make sure you are setting worthwhile, realistic and achievable objectives. If you know that a busy week is ahead, your homework might be as simple as thinking about a new perspective on an old problem. If you have more time, you might decide to handle a big task. Regardless, hold yourself accountable and I will encourage you to do your best.

Coaching preparatory form

Get the most out of your session by preparing for it!

INSTRUCTIONS: Please respond to each question in the space provided. Be sure to make copies of this form for future use. Please send this to me at least 48 hours before our call so that I have time to review it. Thanks!

**What do I want to celebrate?**

**What action have I taken since our last call?**

**What actions did I not take, and what stopped me?**

**What inner shifts are occurring? What is my inner wisdom telling me?**

**Current opportunities**

**Next three steps**

**What I’d like to focus on during our coaching call**

What to talk about with your coach

By Thomas Leonard

**How you are**

1. How you are feeling about yourself -- good stuff and bad stuff
2. How you are looking at your life
3. How you are feeling about others

**What has happened since the last call**

1. What has occurred to you since the last call
2. Breakthroughs and insights
3. Any new choices or decisions made
4. Personal news

**What you are working on**

1. Progress report on your goals, projects, and activities
2. What you've done that you are proud of
3. What you are coming up against

**How I can help**

1. Where you are stuck
2. Where you are wondering about something
3. A distinction
4. A plan of action
5. A strategy or advice

**What’s next**

1. What is the next goal or project to take on
2. What is the next goal or distinction to get
3. What you want for yourself next