



welcome!

Thanks for your interest in **Coaching for Coaches** from Odyssey Learning LLC. I am deeply passionate about working with individuals who want to better understand themselves and learn to create ways to move forward in their lives, and I am looking forward to our work together.

I am especially excited to support coaches in ongoing personal and professional growth, beyond training and required mentor coaching hours. As coaches, we often focus on helping others...it is our passion. We also put a great deal of energy into all that it takes to operate a successful coaching practice, as well as continue to grow our coaching skills. **But to provide the best for our clients, we have to take care of our most valuable resource: ourselves!** Congratulations on taking big step to do just that through coaching.

Attached you will find my **Welcome Packet**. Please read the information and let me know if you have any questions. Then complete forms, save a completed copy for yourself, and **email me copy at info@execskills.com**.

If you haven't already done so, you can **purchase your first four-session package** on my website at: <https://www.execskills.com/coaching-for-coaches> I will send you invoices for any additional packages as needed.

Once we have our sessions scheduled, you will receive a **calendar invite** with the **date, time, and Zoom link**. Please let me know if you need that information.

I am looking forward to our partnership together and supporting you as you work to make a difference in the lives of others.

Warmly,

Diane



Welcome!

Congratulations on taking this important step in your coaching journey. This agreement is designed to help clarify the coaching process, procedures, and our roles in this coaching partnership. My hope is to provide as much clarity as possible to make sure we are all on the same page and have prevented any confusion that could interfere with your success. Please read this agreement carefully and complete the requested information. Please let me know if you have any questions or need more clarification.

The Client Guides the Process

Coaching is a supportive, action-oriented process in which the client and coach identify areas in which change is desired. During our time together, we will partner to

- identify your strengths
- use those strengths to create strategies that work for your individual brain wiring
- develop plans to implement the strategies to bring you greater success

Coach and Client Responsibilities

As a coaching client:

- I agree to make my best effort to fully participate and engage in the coaching process because I am willing and ready to learn and increase my success.
- I am responsible for my own physical, mental, and emotional well-being.
- I am responsible for my choices and decisions in all areas of my life.
- I will partner with my coach to achieve the goals I have chosen to work toward.
- I will notify my coach 24 hours in advance of cancellation if I need to reschedule, except in emergency situations. Missed appointments without prior notification are non-refundable.
- I will consult with any mental health care providers I work with regarding the advisability of work with a coach and will make them aware of my decision to proceed with the coaching relationship.
- I agree to have my name, phone, and email address appear in my coach's client contact log for credentialing with the International Coach Federation.

My coach:

- will support me in moving toward my own goals.
- does not diagnose or treat mental disorders.
- is not a substitute for a counselor, psychologist, psychiatrist, therapist or other mental health provider.
- will refer me to other service providers, if those services may be helpful in my situation.
- will keep my information confidential unless I state otherwise in writing, except as required by law.
- may anonymously and hypothetically share certain topics with other coaching professionals for training or consultation purposes.
- will notify me 24 hours in advance of cancellation, except in emergency situations.

Privacy Policy

Your privacy is very important to me. This privacy policy explains how your records and personal information are managed at Odyssey Learning LLC.

What information might I collect and keep:

- Names and contact information, such as address, phone, and email
- Notes about our sessions
- Notes about future sessions
- Forms and questionnaires you may complete
- Reports from other parties you may give me
- Photos or audio/video recordings made during sessions
- Emails you may send me
- Emails exchanges with other professionals whom you have granted permission for exchange of information
- Copies of receipts for payments

All records are stored with security measures in place. I will not share any of your personal information with anyone or any agency other than representatives of or professional business contractors retained by Odyssey Learning LLC without your written consent unless legally required to do so

Coaching Sessions

Coaching sessions are scheduled at the beginning of the month. All sessions are scheduled on Zoom or other video conferencing platforms unless otherwise determined by the coach and client. In order to establish a strong foundation for progress, **new clients must commit to a minimum of eight weeks of coaching**. The number of sessions scheduled after the initial eight weeks will be determined collaboratively between the client and the coach, based on the needs of the client. Child coaching sessions will be scheduled based on the needs of each individual child as determined in a separate Family Partnership Agreement.

Fees and Payments

- Coaching services are purchased in a package of four one-hour sessions. Sessions are 50 minutes, and packages include brief accountability check-ins or quick support between sessions. Cost of a coaching package is \$600.
- If you require more intensive support between sessions or need Diane to attend meetings/calls with other professionals lasting longer than 15 minutes, services are billed in 30-minute increments at the hourly coaching rate of \$150.
- Invoices for services are sent by email and payable online. No sessions may be scheduled before payment is received in full unless prior arrangements are made.
- Coaching services are generally NOT covered by insurance, although in some situations, services may be paid for using funds from Health Savings Accounts (HSA.) Check with the administrator of your HSA account to verify coverage.
- Clients are responsible for all phone, data, or internet fees.
- If a session is missed, the client is responsible for rescheduling by contacting info@execskills.com. There are no refunds for missed sessions that are not rescheduled.
- There are no refunds for unused sessions.

Use of video, photo, or audio recordings

As a component of coaching sessions, Diane uses video, photo, or audio recordings as tools to help increase client self-awareness and support clients in learning and integrating new skills and strategies.

As a credentialed professional coach, Diane is required to submit coaching recordings for certification, evaluation, or supervision to assure the highest standards of practice. In addition, Diane also trains and mentors other coaches and uses recordings for educational and training purposes. No personally identifying information is shared and all coach supervisors, mentors, and mentees are bound by the ICF Code of Ethics to maintain the highest level of confidentiality. Diane will obtain consent if there is a need to use any video, photo, or audio recording for any reason other than those mentioned above.

Authorized Methods of Communication

Please check any methods of communication that you authorize regarding your services:

- Telephone
- Text message
- Email

U.S.mail

If you have authorized Odyssey Learning LLC to communicate and correspond with you via e-mail, you acknowledge that Odyssey Learning LLC may transmit personal and confidential information to you regarding your services by email over the Internet. This includes emails from scheduling platforms, payment processors, Paypal, Quickbooks, or other methods of invoicing utilized by Odyssey Learning LLC. Odyssey Learning LLC will use reasonable means to protect the security and confidentiality of e-mail information sent and received; however, Odyssey Learning LLC cannot guarantee the

privacy and security of such information. It is your duty to protect your e-mail account, password, and computer against access by unauthorized persons. Odyssey Learning LLC will not be liable in the event that you or anyone else inappropriately uses or accesses your e-mail. You agree that should any information sent to you by Odyssey Learning LLC be intercepted or otherwise accessed or modified by any unauthorized third party, you shall fully release, discharge, and hold harmless Odyssey Learning LLC from any damages arising directly or indirectly from such interception or access. You may revoke your authorization for Odyssey Learning LLC to communicate with you by email at any time by written request.

Statement of agreement

I am ready for coaching. By checking this box, I am indicating I have read this Coaching Agreement with Diane McLean/Odyssey Learning LLC. I have asked any questions about the agreement and I understand and agree to the terms above.

Please Indicate who will be receiving coaching services:

Me. I am the client.

My minor child. I am the parent or guardian

Your name:

Date:

Phone:

Email:

Child's name (if applicable)

Your signature



New Client Profile

Name		Date	
Birthdate		Age	
Street Address			
City		State	Zip Code
Cell #		Home #	
Work #		Email	
Occupation:		Employer	
Names of others in household:			
Referred by:			

Concerns at home	Concerns at work
Any relevant diagnoses or conditions:	
Choose three words that describe you best:	
What do you want more of in your life?	
What do you want less of in your life?	
What are you hoping to gain through coaching?	