



## Coaching Agreement, Policies and Procedures

I am pleased to welcome you as a client and I look forward to developing an engaging, collaborative and creative working relationship. The following material lays out the coaching agreement, policies and procedures in order to assist you in getting a great start in your coaching journey.

### **What is coaching?**

Many people have become overwhelmed and frustrated in their quest to take action and live a healthier life. Identifying and effecting the change that can bring about true, lasting results is not easy. Star athletes, performers and business leaders have long understood the value of working with a Professional Coach who offers support, encouragement, perspective, strategies and accountability.

Coaching is a side by side relationship between coach and client. You will be challenged to explore your current habits, behaviors and thought patterns in order to understand how to achieve your wellness goals. I, as your coach, am a deep listener who hears what you are saying and works with you to achieve your goals and ultimately design the life you love.

Our time together is all about you, your life, your business/career and your wellness. I ask that you make your time with me a priority, show up on time, be prepared to work, be ready to explore your life in a new and different way and have fun. As your Coach, I will support you in discovering, creating and moving toward the life you want. ***I provide the coaching and you will do the work you choose to get the results you desire. Therefore, you will be taking responsibility for your choices and results.*** They are your wins and accomplishments.

By choosing to work with me you understand that personal coaching is a relationship that you have with me, your Coach, that is designed to facilitate the creation and development of your personal wellness goals and to develop and carry out a strategy or plan for achieving those goals.

### **Confidentiality**

Clients frequently want to say something private about themselves or share what they want most in life. ***I want you to know that our meeting are completely private and confidential, except where prohibited by law or if you are in danger of harm to yourself or others.*** I also want you to know that this confidentiality applies to your coach only. If you would like to tell others about the success and growth that comes from our work together that is wonderful and encouraged.

## The Coaching Meeting

For over the phone meetings, we will determine ahead of time who will make the call at the scheduled day and time. Please do your best to make your coaching a priority and keep your appointments.

For in person meetings, we will meet at the set location on the day and time that is agreed upon. Locations that are more than 10 miles from my office may have an additional charge.

I do take minimal notes during our time together to keep us on track. I recommend you set up a coaching file, take notes and keep all pertinent information together and easily accessible for our meetings. Using a spiral notebook or computer for this purpose can be helpful.

## Meeting Rescheduling/Discontinuation

***Please call/text or email me at least 24 hours in advance if there is a need to reschedule. If you fail to provide 24 hours notice to reschedule, your appointment will be forfeited.*** I realize that on rare occasions emergencies do occur so if this should happen please contact me at your earliest convenience and we will reschedule before the end of your billing cycle\*. If a holiday falls on your usually scheduled meetings, we will move the call to another mutually agreed upon day.

***You may choose to discontinue coaching at any time but paid fees are nonrefundable.***

***\*Coaching sessions expire 60 days after purchase unless otherwise agreed upon. This policy is at the sole discretion of Stacey Portugal.***

## Coaching Time and Support

***Please know that I am here to support you and offer support in between our sessions 7 days per week. Feel free to email or text me and I will get back to you within 24 hours (usually sooner).*** This is for questions or concerns that can be expressed quickly and easily; also feel free to share wins anytime! If I feel that these forms of communication would not be effective for you, I will suggest an additional coaching session to accommodate your needs.

## Meeting Preparation/Action Steps

***Please do your best to be on time and prepared for our call. Coaching is a side by side journey and is forward moving with the use of "action steps". You will be determining what action steps you choose to take each week (if any) but please don't be discouraged if you have not completed the action steps as discussed. We are all human and life gets in the way.***

## Communication

Coaching is most effective when we keep the lines of communication open and free flowing. However, there are times in any human interaction where misunderstandings can unwittingly and unintentionally occur. ***If at any time I say or do something that upsets you or doesn't feel right, Please bring it to my attention. Don't let it fester. I promise that I will listen, ask questions and come to an understanding of your perspective. I ask that you do the same so that our interactions will be ones of mutual respect, increased awareness and learning.***

If we start working in challenging areas, we may touch on some personal and sensitive topics. As your Coach, I will be honest, respectful and professional in sharing my observations and perceptions. I ask that you also be honest about the situation so that you can gain clarity and make wise choices. Honesty is the foundation of any relationship, and Coaching can only be successful if we are both honest and respectful.

## Liability

***I do not accept liability for the consequences of your decisions or choices. I work on the basis that you are fully responsible for your own health, career, business and personal choices.*** I will work with you to identify multiple approaches to your challenges or concerns to the best of my ability but only you know what is right for you. I am willing to share thoughts and ideas that come to my mind as we work together and am also willing to share perspectives based on my education and professional experience. However, any and all choices or decisions about a course of action are yours and by agreeing to this contract you hold me, Stacey Portugal, harmless.

Personal Coaching is a comprehensive process that may involve all areas of your life, including but not limited to: work, finances, health, relationships, education, personal development, spirituality, recreation and nutrition. You acknowledge that deciding how to deal with these topics and implement choices is exclusively your responsibility.

***You understand that personal coaching is not to be used i lieu of professional advice.*** You will seek professional guidance for legal, medical, financial, business or religious matters. You understand that all decisions in these areas are exclusively yours and acknowledge that your decisions and actions regarding them are exclusively your responsibility.

***If you are under the care of a physician or feel that there is information that I need to know in order to coach you for weight loss, it is your sole responsibility to follow up with your doctor and inform me of any and all health concerns.***

You are always free to reject any ideas, insights, perceptions or requests made by my Coach at any time.

***As I client, I understand and agree that I am fully responsible for my well being during my calls and this includes any and all decisions that I make during or outside of the coaching call/meeting.***

## How is Coaching different from Psychotherapy?

Coaching is not psychotherapy. I do no work on an “issue” or dig into the past. I leave that work up to you. I will support you to move forward, set personal (and possibly professional) goals and take the necessary action to create what you desire. If, for any reason, it becomes apparent that other professional services are needed, we will discuss your options so that you can get the additional assistance you need.

Coaching is a learning and development model. Coaching is also future oriented and moves toward unleashing your unique desires and potential. Therefore, we will be working towards greater awareness and understanding so that you can make changes that will lead you to your desired outcomes.

***By working with me you acknowledge that personal coaching does not treat mental disorders as defined b the American Psychiatric Association.*** You understand that personal coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and will not use it in place of any form of such therapy. You further understand that if topics arise that you or your Coach believe would be served by seeing a mental health professional, an appropriate referral will be made.

Please don't hesitate to reach out with any questions about this document before we begin our work together. By hiring me as your Coach you, hereby, acknowledge and agree to these terms.

Thanks and I look forward to working with you so you get the results you deserve!