

# PERFORMANCE INSIGHT, LLC

Dr. Scott A. Dreyer

(843) 367-1014

## COACHING AGREEMENT

Dear Coaching Client,

I coach my clients by utilizing questionnaires, asking challenging questions, listening carefully to what you tell me, identifying your values, visions and goals, jointly developing homework, identifying your resources (experiences, strengths and qualities), creating strategies to overcome blocks to success, working toward a high degree of self-care and empowering you to take courageous steps. A key aspect to the coaching relationship is on developing appropriate action steps to help you move toward your goals and dreams. Although there are no guarantees on the outcomes from coaching, most people report significant progress on their goals.

Coaching is not therapy or counseling. Although, I am trained in psychotherapy, I do not engage in the practice of psychotherapy with my coaching clients. If issues arise that are best dealt within a therapeutic context, I will refer you to an appropriately trained licensed therapist. In entering into the coaching relationship, and signing this agreement, you are agreeing that if any mental health difficulties arise during the course of the coaching relationship, you will notify me immediately so I may provide you with appropriate referrals.

We will agree on a standard time for our in-person or telephone conversations. Once that time is established, it will be reserved for you. **If you need to cancel an appointment, please provide at least 24-hour notice or you will be charged for the appointment. Cancellations with less than 24-hour notice will be charged 50% of Dr. Dreyer's hourly rate. I hold myself accountable to the same conditions.** Of course, legitimate illness and situations out of one's control will be waived. My fees are \$\_\_\_\_\_ a month for \_\_\_\_\_ 45-minute coaching appointments. Or hourly rates are typically \$\_\_\_\_\_/hr. (Fees will be discussed at your first session or are available on [www.performanceinsight.com](http://www.performanceinsight.com)).

The information you share with me will remain confidential unless (1) you give specific permission to release the information or (2) I am required to release information by law. Exceptions to confidentiality include information about intent to seriously harm an individual, child abuse, and elder abuse. Be aware that privilege may not apply to coaching; In other words coaching records may be able to be subpoenaed in court. Some means of communication, such as wireless telephones and e-mail may not be secure from eavesdropping. So, if you agree to their use you are indicating your agreement to utilize a communication medium that may not be confidential.

Each party agrees to indemnify, defend and hold harmless the other party and its agents, officers, and employees from and against any and all liability expense, including defense costs and legal fees incurred in connections with claims for damages of any nature whatsoever, including but not limited to, bodily injury, death, personal injury, financial, or business losses, or property damage arising from such party's performance or failure to perform its obligations hereunder.

As a coaching client I understand and agree that:

- 1) I am fully responsible for my well-being during my coaching calls/sessions, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time.
- 2) Coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of therapy. If therapeutic services are needed professional references will be provided.

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Continued.....As a coaching client I understand and agree that:

- 3) If I am currently in therapy or otherwise under the care of a mental health professional I have consulted this person regarding the advisability of working with a performance coach and that this person is aware of my decision to proceed with the coaching relationship.
- 4) Coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
- 5) Certain topics may be anonymously shared with other coaching professionals for training or consultation purposes.
- 6) Coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual or other matters. I understand that all decisions in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my responsibility.

Coaching usually leads to improvements and positive changes in one's life. We will discuss the pros and cons of coaching together.

I believe that each of my clients is unique, creative, and responsible for moving their own life forward. I look forward to working with you.

Sincerely,

_____	_____
Performance Coach and Consultant	Date

*I fully understand and agree to the contents of the above document*

_____	_____
Coaching Client Signature	Date

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## Coaching Policies and Procedures

Welcome!

Welcome to coaching with Performance Insight. I look forward to working together. There are a few guidelines that I expect clients to maintain in order for our relationship to work. If you have questions regarding these policies please discuss them with me.

**Procedure:** Clients call or come to the appointments on time. Clients come to the appointment with updates, progress and current challenges. Let me know what you want to work on and be ready to be coached. **Make copies of the enclosed client Session Preparation Form and fax or email a completed form before each call.** The agenda is client generated and coach supported.

**Fee:** Clients pay on time (within the course of the session contract) unless prior arrangements have been made. Payment can be made by cash, check or credit card.

**Contacts:** Our agreement includes a set amount of calls or appointments. If you or I are on vacation, we will spend more time before you/I leave and after you/I return.

**Changes:** My clients give me 24 hours notice if they have to cancel or reschedule a call/appointment. If you have an emergency we will work around it. Otherwise, a missed call/appointment is not made up and you are responsible for the fee.

**Extras:** You may call between sessions if you need "spot coaching", have a problem, or can't wait to share a win with me. (You can also fax or e-mail me). I enjoy delivering 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 5-10 minutes maximum. When you leave a message, let me know if you want a call back or if you are just sharing.

**Problems:** I want you to be satisfied with our relationship. If I ever say or do something that upsets you or doesn't feel right, please bring it up. I promise to do what is necessary to have you satisfied.

**A Must:** It is necessary for the client to implement the coaching that is given to experience the success of coaching. You have hired a coach to do things differently than you have done before. If you choose to not use coaching and keep doing what you have always done, you will get the results you have always gotten.

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## CLIENT DATA FORM

Please take a reasonable amount of time (you define that!) to answer the following questions. There are no right or wrong answers. Some of the questions capture information where you are today. Other questions will make you curious about what you want from coaching, from your career and from your life in general. Your answers will help us set a strong foundation for the coaching relationship. It is OK if you don't complete all the questions before the first session. You can complete them for the next one.

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Business Name or Company: \_\_\_\_\_

Home Address: \_\_\_\_\_  Preferred Address

\_\_\_\_\_

Business Address: \_\_\_\_\_  Preferred Address

\_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Fax Line: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Okay to leave messages everywhere? \_\_\_\_\_ If not explain: \_\_\_\_\_

\_\_\_\_\_

Preferred means of communication: \_\_\_\_\_

Date of Birth \_\_\_\_\_ Age: \_\_\_\_\_

Other significant dates: \_\_\_\_\_

Preferred coaching schedule:

On (day of week) \_\_\_\_\_ or (time of day) \_\_\_\_\_

How often \_\_\_\_\_ x/month

Names of important people in your life (spouse, partner, children, friends, boss, etc.): \_\_\_\_\_

\_\_\_\_\_

Emergency contact and phone number: \_\_\_\_\_

\_\_\_\_\_

How did you hear about my coaching services? \_\_\_\_\_

What influenced your decision to work with a coach? \_\_\_\_\_

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Have you ever been coached? \_\_\_\_\_ If so, please describe the experience. \_\_\_\_\_

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What are your significant commitments? \_\_\_\_\_

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What would your perfect life look like? \_\_\_\_\_

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What are your dreams? \_\_\_\_\_

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What dreams have you given up on? \_\_\_\_\_

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What do you want to focus on first? \_\_\_\_\_

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What parts of your life are working best for now? \_\_\_\_\_

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What parts of your life are working least well? \_\_\_\_\_

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What has been preventing you from living the life you want to have?

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## GOALS

Do you have specific goals for the coaching relationship? If not what goals might you now create? Provide long term (6 month) & short term (30 day)

What I want to accomplish in the first 6 months of coaching:

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What I want to accomplish in the first 30 days of coaching:

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What two steps could you take immediately that would help you move forward?

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What I hope to gain from the coaching relationship:

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Other important things I'd like my coach to know about me:

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## SESSION PREPARATION FORM

Date: \_\_\_\_\_

To get the most out of our coaching session it is best to spend several minutes preparing for it. Please e-mail or fax me a copy before your session.

What I have accomplished since our last session: my wins or victories -

-  
-  
-

What I didn't get done, but want to be held accountable for:

-  
-  
-

Challenges I am facing right now:

-  
-  
-

What I am appreciative of or grateful/thankful for?

-  
-  
-

How do I want to use my coach today and what do I want to get out of this call/appointment?

-  
-  
-

What I commit to doing before the next session:

-  
-  
-

Energy Drainers I want to take care of - (Do It, Delegate It or Dump It):

-  
-  
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