

SEVEN STONES

LEADERSHIP



BEST PRACTICES COACHING FORMS

*Templates for doing business with clients
for emerging and veteran coaches*

Thank you!

We appreciate your interest in our coaching forms. This document has been created with ease of adaptation in mind. Please feel free to use and modify these forms for your own needs and purposes. Should anyone else wish to use these documents, we ask that you follow the golden rule and send those people to our website www.SevenStonesLeadership.com to purchase their own copy.

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HOW TO USE THESE DOCUMENTS

There is logic behind this set of documents.

Welcome – I am thrilled to offer these templates as the fruits of many years of labor, of designing and crafting what works to support a thriving coaching practice. As coaches we need this infrastructure not just to get our practice up and running, but the forms that pass between coach and client actually determine how safe and contained the process is.

In this way, these documents have value in two domains: they are the paperwork to run our practices well and they are a map of the terrain, offering a structure though which we can move our clients. They represent the parts of the container that make good client care, good process, and are the bones of a good solid working partnership between coach and client. May they serve you well.

These are stand alone products, whole and complete as they are. And, if you would like to go deeper into how to design your coaching relationships, let's set up a conversation.

Instructions

The value of these documents is in both the words and concepts that were developed over a couple decades, and that they are designed for you to make them your own. These templates are in Word so the actual words can be changed to reflect your unique style and tone of communication as necessary. We included placeholders for your logo, website and collateral to be inserted.

Our fabulous designer Vivienne Scholl at Avenue 4 Design is available to enhance the design of these papers if you would like to take them to another level.

The Templates

PreWork

Working Agreement

Letter of Engagement

Welcome Letter

Client Intake Form

ICF Philosophy and Code of Ethics

Preparing for Your Upcoming Session and Coaching Lessons Learned

Evaluation of Your Coach

Descriptions of the Templates

The templates are essentially self-explanatory, but inside of our commitment to bring value to them as a roadmap for process, in addition to best practices around administration, we offer you these descriptions.

PREWORK is designed to allow coach and client to produce the most enticing set of outcomes for the coaching engagement possible, as well as allow the coach to make some observations about the prospect's readiness to engage with the coach and the action-oriented work of coaching. This is a significant part of a coaching process and reflects what is called both Move One and Move Two in the Master Moves of Commerce designed by Marsha Shenk (Good Little Biz) to generate high value exchanges in the marketplace.

Process Tip: Ask yourself these underlying assumptions that arise at this stage: can you dream a big enough dream to really make a bold promise to your client? Can they dream big, and if they are not yet in condition to dream big, what does it say about their readiness for coaching at all?

WORKING AGREEMENT is a document that represents the container of the coaching. Once you have created delicious outcomes and have begun to look at how to gather the right people in the right roles to support fulfillment, you can offer to make a promise. This document is the embodiment of that possible promise to your client. It holds within it the client outcomes, and articulates the flow of relationship and set of promises each player must make in the service of the vision. This is in the master Move Three, setting up indicators for success and Move Four, the promise.

LETTER OF ENGAGEMENT stipulates the fees for services rendered and is the articulation of the value exchange between client and coach.

WELCOME LETTER: How we welcome a client into the work is so important. It sets the tone for the whole body of work to come. At this stage we send the letter, the forms for supporting the flow of coaching and any other information and offerings to support coaching getting started well.

Process Tip: Go over these documents with your client. When you speak live about the promises and sign off on outcomes it makes real what you each are taking on and sets the stage for great work to come.

CLIENT INTAKE FORM is pretty self explanatory, no?

ICF PHILOSOPHY AND CODE OF ETHICS: We included this because hopefully we are all operating within the confines of this code of ethics or some other which we can provide our clients. This sends a message about our commitment to their treatment that is imperative in this age when we see so many examples of abuse of power. While this is not therapy, we still have a huge ethical obligation to the people we serve, and letting them know we take that seriously is good client care.

PREPARING FOR YOUR UPCOMING SESSION AND COACHING LESSONS

LEARNED are tools that support some clients but not all. Not everyone prefers to use this kind of tracking method, and we do not hold everyone to it; but for some it is a godsend and supports their work beautifully.

Process Tip: Offer this as a resource, but not mandatory for success. Encourage the client to revise it or to create their own documentation or process to support the continuity of their coaching experience.

EVALUATION OF YOUR COACH is Move Five in the Master Moves. This is so critical to good work. It is best practice to ask clients to reflect on the process throughout the engagement, but this final moment to pause and reflect on the quality of the coaching as a whole is helpful and supportive to both client and coach.

Process Tip: When done systematically, a final evaluation with every client can be a great way to see oneself from the outside – our growth, patterns and pitfalls, which as we know supports great work over time and is part of our walking our own talk as coaches.