

Discover With Heather

Leadership Coach Spiritual Director Storyteller

Coaching Client Agreement

I'm excited that we're going to begin coaching together. I encourage you to have fun with this work, to stretch and grow in all areas of your life. Remember to dig deep and be fully present. The more you put into our coaching sessions, the more you'll get out of them.

Before we start, please make note of the following policies and reference this document as needed.

The Agreement being entered into is between yourself (the Client) and myself (Heather Hall dba *Discover with Heather*; hereafter, the Coach).

Client-Coach Relationship:

- Our relationship is co-created and depends on the work of both the Client and the Coach.
- By entering into this relationship, we are agreeing to hold ourselves to a high level of integrity and accountability. Integrity means our words and actions match; aligned with our values, beliefs and commitments. Accountability is being reliable and holding each other to our commitments. In our work, this means we honor our commitments (e.g., scheduling, billing, attendance).
- Coaching differs from many other one-on-one helping professions. We believe that you are the one who knows what you deeply desire and what is most important to you. You always determine the agenda and pace for coaching. We go toward YOUR goals...No one else's! And we don't generally work with happened in the past. Unlike therapy, coaching is future oriented. Our focus is your future – working towards the results/outcomes/goals you identify as your primary focus.

Payment:

- In order to create life-changing momentum, I ask Clients to commit to our work for at least **three (3) months**. The cost per month for coaching is **\$300** each month for **two (2)** sessions, up to 60 minutes each, which are scheduled by you during any open time listed on my online calendar: calendly.com/discoverwithheather

Clients are encouraged to carefully evaluate their finances, before entering into this agreement, to ensure that payment for sessions will not cause financial hardship.

- Clients may schedule additional sessions, if they like, for which I'll send an additional PayPal invoice. Additional sessions are **\$150** each for up to 60 minutes.
- Invoices are created through, and emailed from, PayPal several days prior to each month. Invoices sometimes end up in your spam folder. Please email me if you can't find the invoice.
- Payments are made via PayPal. Payment for each month is due on the first day of the month, prior to the time of our scheduled session.
- There are no refunds for sessions. They are non-transferable to others. And they must be used within three months of making a payment.
- Sometimes technology snafus happen; unfortunately, we cannot reschedule or extend the time of sessions. Please have a backup method of communication.

NOTE: The client is still responsible for paying for that session, since the time was reserved for them.

- If a client has not paid for a session, that session will not be held.

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Scheduling:

- Clients are responsible for going to my online calendar each month and scheduling their sessions for the month: calendly.com/discoverwithheather
Doing so earlier, rather than later, will provide you the greatest number of open session choices.
- Unless otherwise specified, sessions are audio only, held via Unberconference. You can call in (**ph# 720-835-5496, PIN 76008**) or access online (uberconference.com/discoverwithheather).

Lateness, Presence & Rescheduling:

- If a Client is late to a session, we'll use the remaining session time available. If a Client is >15 minutes late, without prior arrangement, I will drop the call and they will forfeit their session.
- There may be times when you feel "unprepared" and that is alright. However, it is important to be fully present. Distractions (e.g., children, online activity, etc) make it hard for you to attend our work. Please make arrangements so you can be fully present during our session.
- For your safety, I'm not willing to conduct sessions if you are in a moving vehicle. Please call my phone number (907-231-6778) to let me know if you're running late and when you'll be ready. Then, call into the conference line (**ph# 720-835-5496, PIN 76008**) when you get to a good place to hold your session and we'll pick up with the remaining session time.
- It's important that, whenever a client needs to reschedule or cancel, I receive a PHONE call at least 24 hours in advance. Please leave a voicemail if I don't pick up at 907-231-6778.
- Clients are responsible for creating backup plans to avoid cancelling sessions.
- If a client needs to reschedule, I need 24 hours advance notice, except in case of a serious, unavoidable emergency. Serious, unavoidable emergencies include injury and sudden illness, but do not include things like having a bad week, not feeling like having a session, or an invitation to have dinner with a friend who is unexpectedly in town (to name just a few).
- In the above non-emergency examples, please know that I will totally honor and support you in making the best choice for you. I won't think poorly of you if you go and have dinner with the unexpected visitor! Just please note that I will still require payment for that session time if it was not rescheduled with at least 24 hrs advanced notice.
- In cases where there is at least 24 hrs notice, of course, we'll simply reschedule the session for a time that works better for you. You will have received an email confirmation, when you originally scheduled your session, which will facilitate rescheduling and/or canceling. Please check my online calendar for available times: calendly.com/discoverwithheather

Again, please note that the session cannot be rescheduled, nor the session time extended, if there are problems with your cell phone or internet service.

Between session emails:

- Occasional check-in emails are fine. However, if the Client's question would require a long or involved response from the Coach, it's best to address those issues during our next session.
- The Coach may send session notes or practice recommendations after a session.
- Please hold on to any homework/exercises, rather than emailing them to me before a session, unless requested to do so.
- Please note that, while engagement via social media is encouraged, direct messages and posts are not appropriate for addressing or arranging our sessions.

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Legality:

Please note: I am pursuing additional certification with International Coaching Federation (ICF). This process requires that I track my hours coaching, for possible verification. By acknowledging the terms of this Agreement, you agree to have your name, contact information, and dates of coaching shared with ICF solely for purposes of verifying our coaching relationship. No other details, nor the content of our sessions, will be shared.

- I maintain confidentiality for all of my clients, with the following exception(s):
 - If a client shares that they are in the process of, or are planning to, hurt themselves or someone else, I will break confidentiality by whatever means I deem appropriate in order to ensure that no one is harmed.
 - I will need to break confidentiality as required by law (e.g., subpoena or court order).
- As part of my ongoing training, I may discuss some aspects of our work with my supervisor. In such cases, I still maintain confidentiality; never revealing your identity or identifying information.
- Of course, in this digital age, I cannot guarantee that my cell phone or email (or yours) would not be hacked. Although I take appropriate precautions, those are always potential risks.
- Coaching is an unlicensed, unregulated industry. I am not a therapist and I do not treat or diagnose conditions. Coaching is to be used “at your own risk” and is not recommended as a substitute for therapy. If you have been diagnosed with, or are in treatment for, a mental health-related condition, you are advised to continue with that treatment.
- The Client will seek independent guidance from the appropriate professionals for legal, medical or financial matters.
- By entering into a coaching relationship, you understand and acknowledge that you are solely responsible for your own choices, and that no guarantees or outcomes are being promised as a result of coaching. You are encouraged to seek the advice or second opinions from professionals of your choosing before proceeding with any of the suggestions made during our coaching sessions.

By beginning coaching and submitting payment for coaching, you acknowledge that you have read and understand all the terms and conditions outlined in this agreement and that you agree to abide by the terms and conditions described.

Terms subject to change

These terms are subject to change without notice. When they do change, the Client Agreement page will be updated [<https://discoverwithheather.com/resources>]. Please refer to my webpage for, or request a new PDF copy of, my most recent Client Agreement terms and conditions. Note that if there is a difference between what is noted here and what is on the Client Agreement page, this is unintentional and the most recent update to the Client Agreement Terms & Conditions is what will be used.

TO CONFIRM you acknowledge that you have read and understand all the terms and conditions outlined in this agreement, please COPY/PASTE the following into an email and send it to Heather@DiscoverWithHeather.com with the subject line: “COACHING AGREEMENT”:

“I, [insert your legal name], have read, understand, and agree to abide by the Terms & Conditions outlined within the Coaching Client Agreement.”

Thank you,
Heather Hall

revised 10 February 2020