

Coaching With Kristi

Kristi Reeves Coaching
649 South 700 East, Orem Utah
801-400-2460

Client Data Form

Today's Date _____

Your name: _____ Address: _____

Cell phone: _____ Home Phone _____

Email: _____ Male Female Age: _____ Date of Birth : _____

Place of Birth _____ Ethnicity/Nationality(Optional) _____

Relationship Status _____ Number of Children _____ Ages of Children _____

Education High School Some college BA/BS MA/MS Ph.d Other. _____

Field of Study _____ Additional Background _____

Company Name _____ Occupation/Title _____

Preferred means of communication Text email Phone Call

Your Goals:

What three goals would you like to accomplish in the next 3 months

1. _____
2. _____
3. _____

What one major goal would you like to accomplish in the next 12 months

1. _____

What has been your greatest Challenge?

1. _____

What would you like to work on while working with me as your coach?

1. _____
2. _____

Have you worked with a coach before, or a similar one on one relationship (e.g: a piano teacher, tennis coach, therapist)? If so, what worked well, and what did not work well?

List five things that you're personally tolerating or putting up with in your life at present. (Examples: information you can't find, clutter, rude friends, tight shoes, dented car, job dissatisfaction, dead plants, broken equipment, cranky people in your life, disconnected relationships. etc.)

1. _____
2. _____
3. _____
4. _____
5. _____

In a typical week, what do you spend a great amount of time doing?

What are your primary stressors? (What stresses you out?)

On a scale of 1-10 (10 being high) rate the quality of your

life _____ your health _____ the amount of stress _____

Client Policies and Procedures

Coaching with Kristi

Welcome!

I am excited to work with you as your life Coach. I wish to share some items to assist you and I in creating a connected and helpful relationship. Please call me if you have any questions.

Fee	Clients Pay prior to their session unless other arrangements have been made. Payment may be made by Check, Cash or Venmo (@Kristi-Reeves)
Procedure	<ul style="list-style-type: none">▪ Clients arrive on time – Please park in front of my home and come through the south gate to the back stairs.▪ You inform me what you want to work on, and are ready to be coached▪ The agenda is client generated and Coach supported
Calls	Our agreement includes a set number of calls or visits. If you or I are on vacation, we will discuss how to accommodate both of our schedules.
Changes	I understand that things come up that we are not able to control. My clients give me 24 hours notice if they have to cancel or reschedule a call or session. A missed call or visit is forfeited, and you will be charged for the full amount of the call or session.
Spot Coaching	You may call between sessions if you need “immediate coaching”. Phone sessions will be billed at a prorated amount according to the amount of time on the phone call.
Concerns	I want you to be satisfied with our relationship. If I ever say or do anything that is confusing to you or doesn’t feel right, please bring it up. You are responsible to let me know of the conflicts you feel.
Implementation	To feel that coaching is a success, it is necessary for the client to implement the coaching that is given. There will often be assignments given in the session for you to accomplish through the week. We will discuss those assignments at the beginning of each coaching session. These assignments will help accelerate learning and progressing towards your desired goals. You have hired a coach to do things differently than you ever have before. If you choose to not use the coaching and keep doing what you have always done, you will get the results you have always gotten.

Coaching Agreement & Informed Consent

Coaching with Kristi

Welcome to coaching with Kristi, a professional coaching practice. This document and its attachments constitute a contract between us (the “agreement”). You should read it carefully and raise any questions and concerns that you have before you sign it.

Services:

The services provided by Kristi Reeves, include Coaching or TeleCoaching on topics decided jointly with you, the client. The purpose of coaching is to develop and implement strategies to help you reach personally identified goals of enhanced performance and personal satisfaction. Coaching may address a wide variety of goals including specific personal projects, life balance, job performance and satisfaction, or conditions, situations or experiences in your personal life, business or profession.

What is Coaching?

Coaching is an interaction that occurs between people that produces desired performance, change or transformational results by promoting personal and organizational awareness, purpose, competence and well-being. Coaching is focused on enhancing performance, generating personal change and development of the whole person not separate from the systems of which they are a part. A coach is a person participating in a mutually voluntary interaction with neither responsibility, accountability nor authority over the outcomes of the person being coached.

In each meeting, the client chooses the focus of conversation. This intention creates clarity and moves the clients into action. Coaching accelerates the client’s progress by providing greater focus and awareness of choice, responsibility, and humility. Coaching concentrates on where clients are today and what they are willing to do to get where they want to be.

Life coaching is a powerful human relationship which assists people to design their future and understand their present rather than get over their past. Through a typically long-term relationship, coaches aid clients in creating visions and goals for all aspects of their lives and creating multiple strategies to support achieving those goals. Coaches recognize the brilliance of each client and their personal power to discover their own solutions when provided with support, accountability and unconditional positive regard (validation). The client can count on the coach to be honest and straightforward in asking questions and making requests.

As a coach, my responsibility is to assist you to

1. Make decisions about which changes you would like to make
2. To develop a personal “action plan” in order to make those changes
3. To implement your action plan and make the behavioral changes
4. To develop strategies to maintain the changes you have made

5. Educate you about the power and principles of honesty, responsibility and humility, which will create a stable foundation for you to choose from. I will support, encourage, teach and help you stay “on track” toward your goals.

Your success will depend on your willingness to define and take risks and try new approaches. You can expect me to be honest and direct asking straightforward questions and using challenging techniques to help you move forward. Like any human endeavor, coaching can involve feelings of distress and frustration that accompany the process of change.

Though we may look at experiences from the past and how they affected you, our goal is to focus on present and future.

Payment Procedure:

This agreement, between coach Kristi Reeves (Coach) and the above-named client will begin on _____. The fee for a 50 minute session will be \$75, payable in advance. Twenty-four (24) hours advance cancellation notice is required for all face-to-face, telephone and teleconference (including Skype, FaceTime, phone call) appointments in order to avoid being charged for the time that has been set-aside for you.

The Coach is paid in advance of each series of coaching calls or contacts. The first coaching session will begin after I receive this signed agreement and the first payment. You may pay by cash, check, Apple Pay or venmo. Services must be paid in advance, or they cannot be provided. Services requested by the Client in addition to coaching calls will be billed at a prorated hourly rate (agreed in advance) and will be paid within 30 days of service. Any changes to this procedure must be mutually agreed upon in writing.

Call Procedure:

If the Client chooses to be coached by telephone, Skype, or FaceTime, the Client will call the Coach at the pre-arranged time and telephone number as scheduled, and pays any telephone charges for the call. For FaceTime or phone calls: 801-400-2460. For Skype: kristi.reeves1

Cancellations:

Please remember that you must give 24 hours prior notice if you need to cancel or change the time of an appointment; otherwise you will be charged for the session in full. I will make reasonable efforts to reschedule sessions that are cancelled in a timely manner.

Termination:

Either Party may end the coaching relationship by providing the other party with a written notice, which may be transmitted by email or in person. Email: kristireeves@msn.com

Minors:

I will happily coach children ages 13 and older, with the agreement of the child and parent that there may be times when the parents would come to the coaching session to talk about ways that they can best help their child succeed.

Your signature below indicates that you have read the information in this document (“coaching agreement and Informed Consent”) and any attachments, such as the Coaching Fee Plan, and agree to abide by its terms during our professional Coaching relationship.

Client _____

Date _____

Parent (if client is younger than 18) _____

Coach _____

Date _____

Date _____