



New Client Packet

Welcome! I'm so glad that we're working together. Completing this new client packet is the first step in our work. Please answer all questions below, save the pdf with your changes, and then upload this document to the new client vault.

The following forms are included in this packet:

1. Client Information
2. New Client Questions
3. Client/Coach Agreement



Client Information

Name:

Date of Birth:

Email:

Address:

Phone Number:

Occupation/ Employer:



New Client Questions

1. What do you hope to achieve by working with a coach?
2. Are there factors that might get in the way of you achieving these outcomes?
3. Who is with you on the journey? Who do you take care of and who takes care of you?
4. What are you proud of (past and present)?
5. What does success mean to *you* and how have you experienced it?



6. What are some things that bring you joy?

7. What can you expect of me as your coach? What can I expect of you?

8. What kind of accountability is helpful to you? What is not helpful?

9. Is there any information that you would like me to know about your identity and/ or life experiences (cultural, gender, professional, religious, etc.) that will help me understand you and your background?

10. What will your life look like, feel like, or sound like when we're finished working together?

Anything else that you'd like me to know before we get started?

Client/ Coach Agreement

Thank you for this opportunity, I'm honored to be your coach and look forward to working with you! Coaching is considered a "co-creative" process, that means we both have an active role in the work. This document includes important information about what you can expect in our coaching sessions and our respective roles.

Your Part:

Before Our Sessions

Each week you will bring an **agenda** to our session. This is a topic that you would like us to explore and what you want to take away from our session. Our coaching call will focus on this topic.

Some clients are concerned that they won't pick the "right" agenda, so let me encourage you to take that pressure off of yourself!

Many of the things that we will work on will be interrelated which means there will likely be several avenues to arrive at what you want/ need.

Start Time

Please be on time for our sessions. Your coaching time is reserved just for you so I won't start other projects or multitask during your time. I have commitments to other clients throughout my day, so I'm not able to guarantee that I can extend our time if we start late.

Feedback

Your honest feedback about your coaching experience helps me tailor my coaching for you. Please let me know what is working for you as well as what is not working. I'm more interested in offering you the right support than in "being right"!



My Part:

Our Sessions

I will listen closely to you, respond to what I hear, and ask questions. I'm committed to offering you objective and nonjudgmental feedback based on what I observe in our sessions.

At the end of the session, if you don't mention what actions you would like to take, I'll suggest some ideas. I often ask clients to stretch themselves and commit to concrete ways they will move towards their goals each week. If one of those suggestions is not the right next step for you, I encourage you to let me know and offer something different.

Accountability

Part of my role as a coach is to be an accountability partner for you. I encourage you to communicate with me about what you want that to look like. Every client is different, so there is no one way that I offer this support. I offer unlimited text and email support to all of my clients and will respond to both within my business hours.

Confidentiality

I will honor your confidentiality and the information that we discuss will always be held confidential unless I have your consent/request to share it with another. I am not a psychotherapist and am not trained to offer psychological interventions. If you need services that are not within my scope, I will refer you to an appropriate professional.

Payment:

I offer two different coaching plans: month to month and session packages.

Month to Month Plan

For my month to month services (4 sessions a month), fees are charged as a retainer fee at the beginning of each month. Your plan will auto-renew each month on the day of your initial payment.

Month to month rates are subject to change. You will be notified in advance of any rate changes.

Session Packages Plan

Pre-paid packages are paid in full before we begin our sessions (payment plans can be arranged as needed). My current packages and fees are listed on my website.

Coaching Calls:

Format

Coaching calls can be conducted via audio call or video call depending on your preference. If you prefer audio calls, I can be reached at 770-744-7561 at our scheduled time. If you prefer a video calls, I will email you our meeting link as well as post our link in your private client vault.

Cancellation and No Show Policy

Please give our call high priority and arrange your schedule to honor our time. If you need to reschedule our call, I ask that you let me know as soon as possible. No call/no shows and appointments canceled less than 24 hours in advance are charged at the same rate as a regular session and will not be rescheduled.



Ways to Get More Out of Coaching:

- Come with a clear understanding of what you would like to take away from our session. It's fine if you need to change this because of something we discover during our call, but coming with your agenda in mind will help you get the most out of our time.
- Stay curious with yourself. We all have things that frustrate us and prevent us from meeting our goals. Coaching is meant to help with this. The coaching process can help you clarify what you want, what is getting in your way, and how to meet your goals. A kind and curious approach towards yourself can help with that!
- Commit to self compassion (I can help with this). It's not just about being "nice", self-criticism will undermine the work you're doing. It tends to shut down our problem solving and prevents us from finding solutions.
- Take advantage of the accountability options I offer.
- Be open-minded. Try new approaches. Experiment.
- Be willing to challenge your beliefs and patterns if they don't serve you anymore.
- Offer me honest feedback throughout our coaching relationship about what you need.

Client Signature

Date

Coach Signature *Donnae Cannon*

Date