

## Sample Welcome Letter #4: Policies and Procedures

Welcome! I am delighted to be your coach and look forward to coaching you toward creating the life you really want to have. On a business note, I have some policies and procedures I want you to be familiar with. Please know that if you have any questions regarding these we can discuss them further.

**Commitment:**

You are hiring me as your coach because you want to make significant changes in your life. These changes will sometimes happen fast and sometimes not. Because change happens over time I am requesting a four-month commitment to the coaching process. This allows the coaching relationship to develop and be powerful, and when the going gets tough we stay in collaboration and work through to the other side. As your coach you have my word that I am 100% committed to you being powerful, successful and to having the life you want.

If during the four month phase there is any reason to change our agreement, my request is that we design a time period during which we will look at the issue/s and create a mutual resolution that honors client, coach and the coaching relationship. After the initial period we can continue on a month-to-month basis. When it is time to end the coaching relationship, I request 30 days' notice.

**Fee:**

My monthly fee is \$XXX and the fee for the discovery session is \$XXX. Coaching fees are commonly tax deductible as either a consulting or education expense on your Schedule C. Your payment needs to be received by the 1st of each month at (address).

Please make prior arrangements if you need to be late, or especially if some other day of the month works better in your bookkeeping cycle. As a convenience to both of us, I offer the option of using a credit card for your payments. If you would like to use this service please fill in the information below:

Card type \_\_\_\_\_ Card

# \_\_\_\_\_ - - - - - Exp. Date \_\_\_\_\_

Name on Card \_\_\_\_\_

**Procedure:**

Call me at your scheduled appointment time. This is my coaching line and is dedicated only to clients calling in. It is also used as a fax line so if you are faxing me something and the line is busy please try again later. Evenings and weekends are best for faxes. For voice mail call xxx-xxx-xxxx. Wait for the message and then press #2 to enter my personal voice mail.

**Sessions:**

Our agreement includes four sessions per month at 30 minutes each. Ideally, we will "lock in" a time that works consistently for both of us. If you are on vacation, we will spend more time before you leave or after you return. Four times per year there is a "5th week" in the month, and I use these breaks as a vacation.

If I am traveling and we have a session I will let you know in advance and, generally, we will either change our appointment time or I will know where you can call me on the road.

**Changes:**

Rescheduling an appointment is easy with advance notice. If you have an emergency, we'll work around it. If you must cancel a session, we will make it up to have four sessions during the month, or extra time on the sessions we do have. Missing an appointment without notice is considered a paid appointment.

**Extra Time:**

Call me between our scheduled sessions if you need a sounding board, have a problem or want to share a success with me. I have time between our regular sessions to speak with you if needed, and I enjoy providing this extra level of service. I do not bill for additional time of this type but ask that you keep the extra sessions to five or 10 minutes, please. Also, use my e-mail, fax and voice mail as often as you like.

**Problems:**

If I ever say or do something that upsets you or doesn't feel right, please bring it to the session. I promise to make you right for it and do what is necessary to have you be satisfied.

**E-mail:**

Communications, homework accountability and more can be handled through email. Use it frequently to stay in touch.

Please sign and return a copy of this form.

(Your name) \_\_\_\_\_

(Date) \_\_\_\_\_