



# Sample Business Package

Outcome Focused & Systemic Coaching for the 21<sup>st</sup> Century

by Marilyn Atkinson



PRESENTED BY  
ERICKSON COACHING INTERNATIONAL  
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## **Coaching Services Inc.**

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John Smith 1234- 5th St.  
Anywhere, BC V8V 3A6  
[jsmith@smith.com](mailto:jsmith@smith.com)  
[www.coachingservices.com](http://www.coachingservices.com)

### **What Is Professional or Executive Coaching?**

Coaching is a collaborative partnership between a coach and a willing individual which connects at the deep personal level of beliefs, values and vision. It enables, through a process of discovery, goal setting and specific action. It is for the realization of extraordinary results. It is based in a body of knowledge, technology, and a style of relating that focus on the development of human capacity.

Ralph Waldo Emerson says it well:

**“Our chief want in life is somebody who will make us do what we can.”**

#### **John Smith**

The following are some of the key distinctions that I work with in coaching an executive, and in empowering an organization to operate as a community. I have worked with individuals and groups as large as 300 and as small as 12. Sometimes I work with the individual and they then work with their team. Other times we work with the entire staff together, depending on what area we are out to empower. My style is forthright and compassionate. I have been coaching for over twelve years now, working both internally and externally, as well as having a team and project management background. I believe coaching enhances the quality of life for both the individual being coached and the coach, and that it allows people to operate at their full capacity with joy and ease. It also assists people in being clear about their legacy.

## Areas of Coaching

**Relationships:** The relationship of the people in the company is the human glue that holds the company together and allows it to operate at its maximum capacity. A coach helps you get to really know your people, their needs and what motivates them.

**Emotional Awareness:** Briefly this has to do with being able to handle situations with compassion through self-awareness and self-discipline. The best managers score high in emotional awareness and intelligence.

**Feedback:** This ranges from active listening to formal assessment tools and reports about an executive's performance, behaviour and possible blind spots. Feedback enables the executive to create development plans that increase performance, sometimes through behaviour modifications.

**Listening:** Listening is the key to being an effective coach. It can be lonely at the top. An executive may need a listener and effective dialogue to sort through issues and decisions. A coach knows the kind of questions to ask that lead to insights and to openings for action for the executive in his or her accountabilities.

**Stretch and Risk:** We will push ourselves outside of our comfort zone with the support of a great coach.

**Commitment:** Re-examining goals and values from a holistic approach. Being a CEO, president, or manager is not who you are in life. It is only one aspect of a full life of friends and family and interests. How do we keep harmony in all of these areas?

**Effective Communication:** The gift of language is a tool. Speaking and listening do only one of two things in life; they create or destroy. Know the difference and honour the tool.

**Personal Power:** Where does it come from, other than knowledge?

**Passion:** What is it—and what is yours? We think our passion as those things we love to do. I say those things are an expression of our passion, that our passion is our gift, what we make available in the world; our purpose. What will be your legacy?

**Strategic Design:** Creating and implementing personal or corporate Vision, Mission, Purpose and core values.

If you would like more information about my work or about me, please visit my website:

[www.coachingservices.com](http://www.coachingservices.com)

If you are interested in an initial interview to see if my style and experience meet your needs please feel free to contact me:

By phone at (250) 123-4567      Or e-mail: [jsmith@smith.com](mailto:jsmith@smith.com)

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## **Coaching Fee Structure**

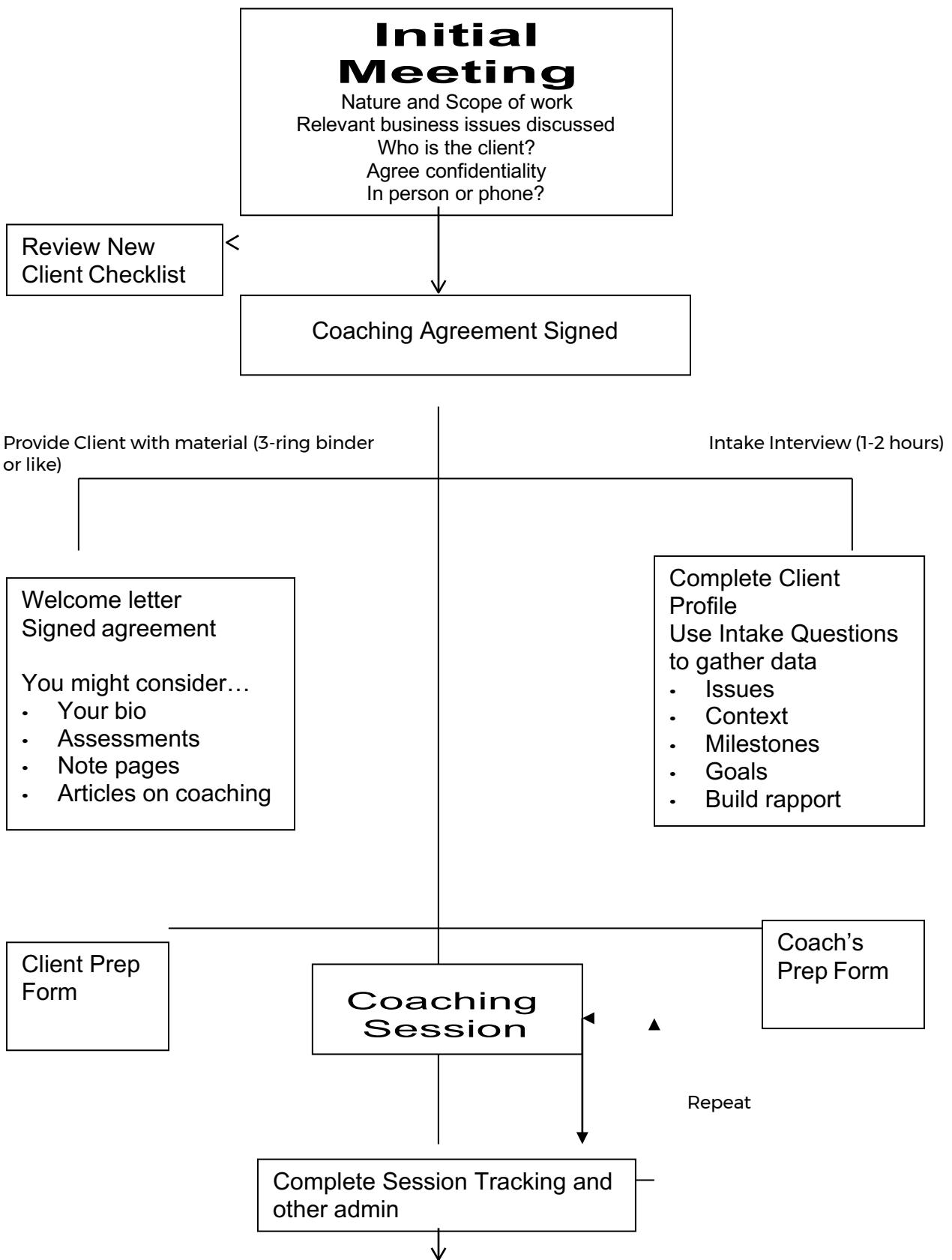
### **Individual Executive Coaching \$400 - \$700 per month**

- Dependent on whether coaching is on the phone coaching or in person.
- Dependent on the number of executives in the same organization being coached.

### **Facilitation \$1,500 per day**

If the client would like me to facilitate any processes such as team building, creating team visions, team assessments or any other group facilitation.

# Coaching Flow Chart





## **Coaching Services Inc.**

---

John Smith 1234- 5th St.  
Anywhere, BC V8V 3A6  
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[www.coachingservices.com](http://www.coachingservices.com)

### **Welcome to Coaching!!**

Many organizations are discovering the benefits of Business Coaching. Coaching helps high-functioning executives and managers bridge the gap to their next level of success. Coaching gives executives and managers the opportunity to strengthen specific interpersonal, communication, leadership or managerial skills.

I look forward to coaching you to accomplish what you really want; to have you be more successful as well as to have more of what you want in life. To make your coaching experience more productive:

- Be committed to your goals and vision. Take the time to examine what you want and need, and determine goals that are truly meaningful to you.
- Make a commitment to yourself to complete your action plan each week by experimenting with new approaches and behaviours.
- Make your coaching session a priority in your schedule. Come to the session prepared with what you want to discuss.

The goals of each coaching conversation are to assist clients in (1) promoting self-discovery, (2) establishing achievable goals, (3) determining a course of action, and (4) empowering themselves to achieve their goals. Typically, the client sets specific goals each month, and periodically, the client, the person hiring the Coach, and the Coach meet to determine what has and has not been accomplished and to clarify future goals.

The Coach will work with the Coachee for six to eight months to increase his/her performance. The first month of coaching may include using various assessments and performance evaluation tools used within your organizations

Based on any assessments or performance evaluations, the Coachee and Coach develop an action plan and targets of accountability. The Coach meets with the Coachee 3-4 times a month for 30 minutes to 1 hour by phone or in person.

By starting a coaching arrangement with me you are indicating that you are willing to do and be your best. This is a personal investment of your resources and demands your best work. If you aren't doing your best, I will ask you to do so.

# **Client Agreement**

To lay the foundation for our business relationship, I want to provide you with the following information and ground-rules for our work together. If you have any questions please let me know.

## **FEES:**

The fee for our work over the next 3 months will be \$500 per month. If we choose to proceed with our work beyond the initial period, we will discuss fees appropriate to your unique situation.

Cheques are to be made payable to: Coaching Services Inc. 1234-5th St. Anywhere, BC, V8V 3A6

## **SESSION TIME:**

\_\_\_\_\_ minutes ; \_\_\_\_\_ times per month

\*Day and time to be agreed upon.

## **PROCEDURE FOR SESSIONS**

Client calls the coach at (250) 123-4567 at the pre-arranged time of our call or is available for the pre-determined appointment.

## **CHANGES**

If you need to reschedule your call or appointment, please give me at least a 24-hour notice. All make up calls/sessions must be completed within the current month. If you are on vacation we will spend more time before you leave or after your return to insure that we meet our commitment.

If you have an emergency we will work around it. If you must cancel a call we will do our best to make it up to meet our commitment.

## **EXTRA TIME**

You may call me between our sessions if you would benefit from a short five-minute 'laser' coaching session or would like to share a success with me that cannot wait until our next session. I do have time between our regular calls to speak with you, if needed. I enjoy providing this extra level of service. I do not bill for extra time of this type, but I ask that you keep extra calls to 5 or 10 minutes, please.

## **CHALLENGES**

If I ever say or do anything that upsets you or doesn't feel right, please bring it up. I am here to support you and to support your coaching needs.

## **Confidentiality**

When a Coach is brought into an organization, confidentiality for the Coachee/Team is essential. The level of confidentiality for each Coachee is determined from the following options:

- Level 1 - Complete confidentiality. Nothing is shared outside the coach-client relationship.
- Level 2 - Tight confidentiality. Coach reports back to the organization after clients signs off on all reports.
- Level 3 - Limited confidentiality. Coach reports back to the organization but only on issues that management requests. Coach is available to meet with the client and client's manager periodically.

Confidentiality level for this Coachee/Team:

---

During the coaching relationship, the Client (company or Coachee) may share future plans, business dealings, and other proprietary information with the Coach. The Coach will not at any time, either directly or indirectly, use any such information for the Coach's own benefit. The Coach will not give out the name of any Client as a reference without that Client's consent. The coaching relationship is confidential unless the Client chooses to tell someone about it.

This confidentiality statement shall be as confidential as the applicable provincial or federal laws and the client's own company policy, if applicable, allows. The Coaching relationship is not privileged and, as such, a Coach's records on a client can be subpoenaed.

## **Nature of Relationship**

Client is aware that the coaching relationship is in no way to be construed as psychological counselling or any type of psychotherapy. Our coaching sessions are not a replacement for existing supervisory or management processes. All issues of a human rights or disciplinary nature must be handled within established policies and procedures and will not be discussed during our sessions.

A client enters into coaching with the understanding that he or she is responsible for creating his or her own decisions and results. Client also agrees not to hold the Coach liable for any actions or results for adverse situations created as a direct result of a specific referral given by the Coach.

### **TERMINATION**

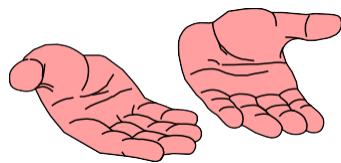
Because of the time, scope and nature of the work, my policy is that the initial term is three months. After the initial three-month term, the client (company or individual being coached) may cancel at any time. Cancellation must be in writing (letter, facsimile or email). In the event of fees owed at the time of cancellation, full payment is due.

CLIENT HAS READ AND AGREES TO THE ABOVE.

Coachee signature \_\_\_\_\_ Date \_\_\_\_\_

Client Company Representative Signature \_\_\_\_\_

Coach Signature \_\_\_\_\_



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## **Client Data**

Date prepared \_\_\_\_\_

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/Province or State \_\_\_\_\_

Postal code/zip code \_\_\_\_\_

Day phone \_\_\_\_\_ Evening phone \_\_\_\_\_

Email \_\_\_\_\_

Fax \_\_\_\_\_

Date of birth \_\_\_\_\_

Occupation \_\_\_\_\_

Nature of Business/Position \_\_\_\_\_

Duration of Session \_\_\_\_\_ minutes. Sessions per month \_\_\_\_\_

Session Time: M T W Th F Sa Su \_\_\_\_\_

Monthly fee \$ \_\_\_\_\_

Notes

**[customize to suit your needs]**



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Anywhere, BC V8V 3A6  
[jsmith@smith.com](mailto:jsmith@smith.com)  
[www.coachingservices.com](http://www.coachingservices.com)

Mike McLean  
McLean Publishing  
12345-67th Ave  
Anyplace, B.C. V3A A9L  
December 3, 2008

Dear Mike,

Thank you for your interest in coaching, and I congratulate you for taking the time to explore the possibility of having your very own personal coach. Our first conversation was very exciting and I really enjoyed sharing your enthusiasm for this new chapter in your life.

**[insert sample paragraph—see next page]**

Please take the time to complete the enclosed documents and return to me as soon as possible. Once I have that paperwork, we can get started.

The policies and procedures are outlined in the coaching agreement. We have arranged to meet on the phone, and you will call me each week at a pre-arranged time. If you cannot make that time, please call to make other arrangements. If you want to talk between our scheduled sessions, I am always happy to hear from clients and there is no extra charge.

When I receive your returned material, we will set a time for a weekly session that works for both of us. I am looking forward to working with you to create the results you want for yourself and your business.

Regards,

A. Qualified  
Coach

The cover letter should include a summary statement covering the **nature and scope** of the work the coach and the client will do together, based on the information discovered in the pre-intake interview and discussions. The statement will reflect the coach's understanding of what the client and coach will be working on during the coaching engagement.

**Example:**

The client has reached a new position in the organization and wants to work with a coach to get off to a strong start.

-or-

The client has strong technical skills and would like to develop leadership skills to use within a management team.

-or-

The client has been advised for medical reasons to work less and get more exercise, but seems unable to get the job done in less time.

**Sample Paragraph:**

*The nature of our relationship is that of a professional partnership focused on supporting you in achieving your targets. Through a series of questions, questionnaires and/or assessments, the coach will assist you to clearly define your personal and professional goals. Consider your coach your collaborative partner as you work towards creating the results you want.*

*The scope of our work will be based on the personal and professional goals you define. I understand from our discussions that: xxx xxxxx xxxxxx xxx (see above) and this will be our starting place for our discussions. We have agreed to assess the effectiveness of our relationship at regular intervals of approximately three months.*

# Progress Record

Client Name \_\_\_\_\_

## Projects

| Date | Project | Completion Date | Complete/re target |
|------|---------|-----------------|--------------------|
|      |         |                 |                    |
|      |         |                 |                    |
|      |         |                 |                    |
|      |         |                 |                    |
|      |         |                 |                    |
|      |         |                 |                    |
|      |         |                 |                    |

## Goals Reached

| Goal | Date Set | Date Reached |
|------|----------|--------------|
|      |          |              |
|      |          |              |
|      |          |              |
|      |          |              |
|      |          |              |
|      |          |              |
|      |          |              |

## Inventory Scores Improved

| Inventory | Date | Score |
|-----------|------|-------|
|           |      |       |
|           |      |       |
|           |      |       |

## Unexpected Wins or Breakthroughs

| Date | Win or Breakthrough |
|------|---------------------|
|      |                     |
|      |                     |
|      |                     |
|      |                     |
|      |                     |
|      |                     |

## New Client Checklist (Sample)

Client \_\_\_\_\_

Before accepting a client

- What are the 3 things I **know** I can help the client accomplish?
- Will the client commit to the first three months of coaching?
- Will the coaching fee cause hardship or be difficult for the client to afford?
- Is the client likely to commit to getting the results they say they want?
- Should their employer or other agency sponsor this client?
- Is this client ready for a **coach**, or do they need someone/something else?
- Is there any other reason why I should NOT coach this client (conflict of interest, other inside information)

After acceptance, before first session

- Schedule first call or appointment
- Make sure the client has completed or understands:
  - the agreement
  - any other relevant documents
- Review the ground rules, agreements and terms of relationship
- Double check to make sure the client is ready and right for this

If the client has completed any coaching forms or assessment worksheets, review these before the first session.

## During the First Session

- Welcome the client
- Gather all the data you need for the Client Profile
- Use the intake questions to get started working with the client
- Agree on goals or projects to work on for the first 90 days or defined timeframe
- Discern where the client is in relation to their goals
- Discern their present obstacle(s) to success
- Give the client homework or an area of focus if useful
- Schedule next/subsequent sessions

## **Intake Questions for Individuals**

Tell me a bit about what you do.

What you know about/feel about coaching (vs. other things)

How open are you to coaching – how might you use coaching personally?

What would you want out of coaching? What would it allow you to do differently? What is the appropriate degree of confidentiality? (For corporate clients.)

Think back on your career, through all of its ups and downs, twists and turns. What do you consider to be the peak experience or high point – a time when you felt most committed, most connected, and most alive in your work?

Without being humble, what is it that you value most about yourself, the nature of your work, and the organization/team?

What do you want more of?

What strengths would you like to

build on? Growth edges?

If you were to embark in a coaching relationship, how would you know it was successful?

What one change, over the next three months, would make the greatest difference in your performance?

Do you have a professional development plan?

What legacy would you like to leave this organization?

## **Intake Questions for Teams**

Best team experience?

What does ‘team” mean to you? (“who do we want to be?”) What do you believe the leadership team is in business to do? What strengths do you bring to this team?

What is it that you value most about the team/organization? What makes this leadership team successful right now? What would you like to see more of?

What three wishes would you make to heighten the vitality of this team? This Organization?

What do you consider to be the core factor that breathes life into this organization?

What one change, over the next three months, would make the biggest difference to the team?

Is there anything that I could have asked or done differently, or that I didn’t ask?

# INVOICE Sample 1

**Coaching Services Inc.**

1234- 5<sup>th</sup> St.  
Anywhere, BC V8V3A5  
Ph. (250) 123-4567

**DATE :**  
**INVOICE No. :**  
**HST#:**

**INVOICE TO :**

**CONTACT :** Jill Johnson

| <u>Month Ending</u> | <u>AMOUNT</u> |
|---------------------|---------------|
|---------------------|---------------|

**Subtotal**

**HST @ 12%**

---

**Expenses**

to follow in separate invoice

---

**TOTAL**

# EXPENSE REPORT

**For period ending:**

**NAME:** Coaching Services Inc.  
**ADDRESS:** 1234- 5<sup>th</sup> St.  
Anywhere, BC  
V8V3A5 Ph. (250)  
123-4567

**DATE:**

11. **What is the primary purpose of the *Journal of Clinical Endocrinology and Metabolism*?**

11. **What is the primary purpose of the *Journal of Clinical Oncology*?**

PREPARED BY: John Smith

AUTHORIZED BY: \_\_\_\_\_



## **Coaching Services Inc.**

---

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1234- 5th St.  
Anywhere, BC V8V 3A6  
[jsmith@smith.com](mailto:jsmith@smith.com)  
[www.coachingservices.com](http://www.coachingservices.com)

William Shakespeare  
The Fine Quill  
Company  
1111 Main  
Road Anywhere, BC  
V9B 5Y2  
March 1, 2011

### **I N V O I C E      Sample 2**

Re:            Coaching: William Shakespeare

Our ref:      Coach-01-23

To:            Coaching: March-May, 2008 Inclusive            \$1,500.00

                  HST # 123 456 789                            \$ 180.00

                  TOTAL    \$1,680.00

Please make cheque payable to Coaching Services Inc.

Thank you for the opportunity to work together!

A. Coach me

# Session Tracking

Name of Client

## Coaching Sessions:

|           |            |          |               |
|-----------|------------|----------|---------------|
| 1. Date:  | Start time | End time | Next session: |
| 2. Date:  | Start time | End time | Next session: |
| 3. Date:  | Start time | End time | Next session: |
| 4. Date:  | Start time | End time | Next session: |
| 5. Date:  | Start time | End time | Next session: |
| 6. Date:  | Start time | End time | Next session: |
| 7. Date:  | Start time | End time | Next session: |
| 8. Date:  | Start time | End time | Next session: |
| 9. Date:  | Start time | End time | Next session: |
| 10. Date: | Start time | End time | Next session: |
| 11. Date: | Start time | End time | Next session: |
| 12. Date: | Start Time | End Time | Next Session: |

## **Purpose and Performance**

Sample of text to include in Introductory or Welcome letter:

- Purpose and performance are like the charged relationship of an electron and proton between and around which energy flows.
- The personal purpose of an individual is the basis for goals, actions and performance
- The purpose of an organization is its mission.
  - Execution of the mission is organizational performance.
- For both an individual and an organization –
  - “purpose without performance is an unfulfilled mission”
  - performance without purpose is an empty achievement

The challenge is to link personal and organizational performance that generates the energy to accomplish the mission of both the individual and the organization