

CenterPoint

Wendy Hill, M.A.

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760-994-9296 858-759-0512 fax

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Client Data Form

Date

Name

Occupation

Business name

Home address

Business address

Day phone

Evening phone

Fax line

Cell phone

Email

Okay to leave messages everywhere?

If not, please explain

Preferred means of communication

Date of birth

Age

Other significant dates

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Client Policies and Procedures

Welcome to coaching as my client. I look forward to working together. There are a few guidelines that I expect clients to maintain in order for our relationship to work. If you have any questions, please call me.

Fee

Clients pay me on retainer unless prior arrangements have been made. Coaching fees are paid in advance. Payment may be made by check or credit card.

Procedure

Clients meet (in person or on the telephone) on time. Come to the meeting with updates, progress and current challenges. Let me know what you want to work on and be ready to be coached. Make copies of the **Meeting Preparation Form** and bring completed forms to the meeting or if the meetings are by telephone, fax or email a completed form before each meeting. The agenda is client generated and coach supported.

Meetings/Calls

Our agreement includes a set amount of calls or in-person meetings. If you or I are on vacation, we spend more time before you/I leave and after you/I return.

Changes

Please give 24 hours notice if you have to cancel or reschedule a meeting. If you have an emergency, we will work around it. Otherwise, a missed meeting/call is not made up.

Extra Time

You may call between sessions if you need “spot coaching”, have a problem, or can’t wait to share a positive result with me. (You can also fax or email me.) I enjoy delivering this extra level of service. I do not bill for additional time of this type, but I ask that you please keep the calls to five or ten minutes. You will be billed for longer calls. When you leave a message let me know if you want a call back or if you are just sharing.

Problems

I want you to be satisfied with our relationship. If I ever say or do something that upsets you or doesn’t feel right, please bring it up. I am committed to a win-win relationship with you and will do everything in my power to that end.

A Must

It is necessary for you to implement the coaching that is given in order to feel that your coaching is a success. This means you do what you have committed to do. You have hired a coach to help you 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.

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Coaching Agreement

Please review, adjust, sign where indicated, and return to me at the above address.

Name

Initial term Months, from through

Fee \$ Per month, \$ for the project.

Meeting date Meeting time

Number of meetings per month

Duration (length of scheduled meeting)

Referred by

Ground rules:

1. Client meets at the scheduled time whether it be by telephone or in-person.
 2. Client pays coaching fees in advance.
 3. Client pays for long-distance charges, if any.
 4. Client pays for any additional meetings (phone or in-person) at an hourly rate.
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1. As a client I understand and agree that I am fully responsible for my well-being during my coaching meetings, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy and that professional referrals will be given if needed.
 2. I understand that coaching is a relationship I have with my coach that is designed to facilitate the creation/development of personal, professional and/or business goals and to develop and carry out a strategy/plan for achieving those goals.
 3. I understand that coaching is a comprehensive process that may involve all areas of my life including work, finances, health, relationships, education, and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
 4. I understand that coaching does not treat mental disorders as defined by the American Psychiatric Association. I understand that coaching is not a substitute

De-Cluttering

We put up with, accept, take on, and are dragged down by people, things, and situations that we may have come to ignore in our lives. Now is the time to identify those things that drain your energy. As you think of more items add them to your list. You may or may not choose to do anything about them right now but just becoming aware of them is the beginning of the elimination of them.

Energy Drainers at Work	Energy Drainers at Home
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Goals

Name

What goals, aspirations, desires, and/or intentions I want to accomplish in the first six months of my coaching.

Business

Personal

What I want to accomplish, change, or create in the first 30 days of my coaching.

Business

Personal

What I hope to gain from this coaching relationship.

Other things I'd like my coach to know about me.

Life Balance

Rate your level of balance satisfaction in each of the following areas on a scale of 1 to 10 (10 being the highest satisfaction). Then comment on a possible goal in each area.

Career/Business

Family/Friends

Finances

Intimacy/Romance

Health/Self Care

Social/Fun

Personal Development

Spirituality

Physical Environment

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Meeting Preparation Form

To get the most out of your coaching meeting it is best to spend several minutes preparing for it. Please email or fax me a copy before your meeting.

Name

Date

What I have accomplished since our last meeting. (Include even small victories).

What I didn't get done for which I want to be held accountable.

Challenges I am facing right now.

What I am currently appreciative of or grateful/thankful for.

What do I want to address in this upcoming meeting?

What I commit to do before this upcoming meeting.

My Personal Vision

Name _____

You are the creator and director of our own life. Imagine you are writing the screenplay for the rest of your life. Here is your opportunity to write what you want your life to be. The following are exercises that stretch your thinking and imagination. Have fun with this. Your imagination opens the door to manifested reality.

Exercise One: When you were younger what were your dreams and desires? What drove you? Who did you admire? What did you want to become?

Exercise Two: Complete the following sentences as though your life were exactly as you would like it to be. Let this be a reflection of what you envision for your **ideal** life.

In my family life I am committed to (spending time with, working with, enjoying, teaching, taking care of my spouse, partner, friends, family, and/or children)

For recreation and fun I enjoy
