

## CLIENT INTAKE FORM

---

**Client Name:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Birthdate:** \_\_\_\_\_ **Married?** Yes / No

---

## Coaching Service Agreement

**Contract Fee:** Impact Igniter Experience Coaching Package \$250/mnth CDN

*This Package Includes the Following:*

- \*\* 2 x 30min Private Coaching Sessions/Month
- \*\* 1 x 1.5hr Group Mastermind Session/Month
- \*\* Membership in the SoulSpa Inner Circle
- \*\* Exclusive Learning Materials & Resources
- \*\* 6-month package

**Contract Period:** June 2018 through December 2018

*Client may cancel contract at any time with 1 month advance written notice*

**Sessions are scheduled as:**

- \*\* 1<sup>st</sup> & 3<sup>rd</sup> Wednesday of the month @ 2:30 – 3pm
- \*\* **First Session: Wednesday, June 20 @ 2:30pm**

**Payment Method:** E-transfer (on or before the 15<sup>th</sup> of each month) \$250/month to [jackieharray@gmail.com](mailto:jackieharray@gmail.com) (password: soulspa)

**Session Time:** 30 minutes/session



**Coaching Process: Sessions:**

- \*\* Client and coach will meet at a pre-arranged time and location (Ex. Phonecall at 10am) for scheduled sessions, unless otherwise instructed.
- \*\* Please note that a 'no show' is considered as a coaching session.

**Coachable Moments:**

- \*\* Please feel free to email (jackieharray@gmail.com) or text me (780-385-1019) anytime during regular business hours and I will get back to you within 24hrs (excluding weekends and holidays).
- \*\* You are welcome to contact me between our coaching sessions for additional support if you have a challenge, need support or want to share your successes.

**Challenges:**

- \*\* If I ever say or do something that upsets you, please let me know right away. I will do my best to rectify the situation and make it right.
- \*\* I value honesty & integrity. I will expect this from you and expect you to notify me if I have overstepped your boundaries or made you feel uncomfortable.

**Termination:**

You may cancel our contract at any time; however, cancellation must be requested in writing either by email or personal letter on or before the 1<sup>st</sup> of the month.

Client has 12 months from the date of this contract to complete/use specified sessions.

There will be no refunds, however, if the client cancels our contract, any remaining balance will be void.



### Confidentiality:

I (Coach) recognize that you (Client) may have the following: Future plans, business affairs, customer lists, financial information, job information, goals, personal information and other proprietary information. I will not at anytime, either directly or indirectly, use any information for my own benefit, disclose or communicate in any manner any information to any third party. I will not divulge that we are in a coaching relationship without your permission.

The exception to this confidentiality statement is for certification purposes. To maintain professional coaching designations, Client permits Coach to submit Client's name, the duration of the coaching relationship and phone number or email address to credentialing bodies; the nature of conversations will never be shared. Client should inform Coach before signing this agreement if Client is uncomfortable with this confidentiality exception.

### Nature of Relationship:

Client is aware that the Coaching relationship is in no way to be construed as psychological counseling or any type of therapy. Should the Client feel the need for professional counseling and therapy, it is therefore the responsibility of the client to seek such services. The Client enters into coaching with the understanding that they are responsible for creating their own results. The Client is hiring ShiftPoint Coaching & Consulting for the purpose of guiding and supporting them in the process of developing and reaching intended goals and the Client understands that Coaching results are not guaranteed.

Client has read and agrees to the above.

\_\_\_\_\_  
Melissa Radford (Client)

\_\_\_\_\_  
Date

June 13, 2018

\_\_\_\_\_  
Jacqueline Harray (Coach)

\_\_\_\_\_  
Date



## Coachability Index

**How coachable are you right now?** 1) How probable is each statement for you right now? Circle the number that best represents how you feel for each statement on the right (1 – not likely; 5 – very likely) 2) Total your score then use the ‘scoring key’ to score yourself (circle your total)

**\*\*Your coach needs you to be at the place in life where you are coachable. This index helps your coach – and you – discover how coachable you are, right now.**

<div style="display: flex; justify-content: space-between; width: 100%;"> <span>Not Likely</span> <span>Very Likely</span> <span>Statement</span> </div>					
1	2	3	4	5	I can be relied upon to be on time for all calls
1	2	3	4	5	This is the right time for me to accept coaching
1	2	3	4	5	I am fully willing to do the work and let the coach do the coaching
1	2	3	4	5	I keep my word without struggling or self-sabotaging
1	2	3	4	5	I'll give the coach the benefit of the doubt and "try on" new concepts for different ways of doing things
1	2	3	4	5	I will speak straight (tell what's really true) to the coach.
1	2	3	4	5	If I feel that I am not getting what I need or expect from the coach, I will share this as soon as I sense it and ask that I get what I want and need from the relationship
1	2	3	4	5	I am willing to eliminate or modify the self-defeating behaviors that limit my success
1	2	3	4	5	I have adequate funds to pay for coaching and will not regret or suffer about the fee. I see coaching as a worthwhile investment in my life
1	2	3	4	5	I am someone who can share the credit for my success with the coach
<b>Your Total Score (add up the value of all of your responses) =</b>					

### SCORING KEY (circle your score below)

10 to 20    Not coachable right now  
 21 to 30    Coachable, but make sure ground rules are honored!  
 31 to 40    Coachable  
 41 to 50    Very coachable; ask the coach to ask a lot from you!



## The Coaching Process:

Coaching is a supportive growth process, where personal and/or professional discovery take place in a safe, nurturing environment. As your coach, I serve as a collaborative partner in helping you to discover new and exciting things about yourself that will propel you forward to living a life full of purpose, passion, joy and ease. Coaching helps you change the way you look at yourself, your relationships & your career... essentially your life. Coaching is all about YOU and helping you to achieve what you wish to.

It is important to know that coaching is not therapy. A coach is not a guru or the master of all answers – as an experienced and trained coach, I am someone who is committed to supporting YOU, helping you to stretch outside of the box to realize the very best for you.

## My desire and intention is to:

- Create a safe space of zero judgement & all possibility for you. I do that by fully listening to you, asking some powerful, direct questions and being open and honest with you. I will call you on your truth but I will also support you, hold you accountable & cheer you on.

## Together you and I will:

- Uncover your truth, stop the circling, hiding, numbing & avoiding and empower you to move forward and reveal the incredible YOU that is hiding within. We will remove obstacles, bust apart walls and get very clear on what you want, Who You Are and how to step into your OWN life story with joy & ease.

## You can expect the following from me:

- I have no agenda of my own...this is your time and it is all about YOU.
- Everything you share will be held in the strictest of confidence.
- We will have fun & laugh during the coaching process!! (probably shed a few tears also)
- I will always be honest with you – I value integrity, virtue & honesty
- Together, we will consistently look for ways to help you move forward and remove any challenges and complexities that are holding you back.
- I hold a genuine and sincere belief in you and your capabilities. All the answers you need – you have.
- I use my gift of intuition and perception to listen “between the lines” of what is not being verbally communicated. Bringing to your attention the things you may not be aware of in order to support you in the growth process.
- I am your collaborative partner and cheerleader.
- I will help you create the stepping stones to use in your journey from where you currently are - to where you wish to be.

**What I Expect from You:**

- You come to our sessions on time (if you cannot make a session, you let me know in advance)
- You are completely honest with me, letting me know if something is not working for you so that we can make the necessary changes to benefit you.
- You let me know at any given time how I can best support and acknowledge you so that you are empowered.
- You be willing to stretch a bit, being open to new potentials and possibilities.
- You be willing to take action when it is appropriate.
- You honor the financial agreement that we have made.

**Finally:**

Please know that I am committed to supporting you throughout our time together. We are a team and, as a team, we will collaborate to make things happen for you.

I am committed to adhering to the ethical guidelines set by the International Coach Federation (ICF) ensuring that my practice is one of integrity – upholding and respecting my clients' privacy and confidentiality.

Jackie

