



## **PRO'Wellness Coaching Welcome Letter**

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[www.kdavis.biz](http://www.kdavis.biz)

Dear Client,

I want to personally welcome you for coming on board as a new client! I am excited and pleased that you have chosen to work with me, and look forward to coaching you, in order to accomplish your personal wellness and self development. I've enclosed a few things as follows to get us started.

**Client Data Sheet**

**Coaching Agreement**

**Client Guidelines**

**ICF Code of Ethics**

**Testimonial From**

Please return this Welcome Pak to me 24 HOURS PRIOR to our first session with the following forms completed:

- **Client Data Sheet**
- **Optimum Life Assessment**

Some clients find it beneficial to use the Client Prep Form before each session starting with the second session. Please find this attached as a separate document.

**When you return the Welcome Pak to me, please provide an indication that you agree with the attached Coaching Agreement terms and conditions in the body of your email.**

I am honored to have been selected by you to be your Wellness & Self Development Coach, and am 100% committed to your success. I want you to know that I am available via e-mail in between our coaching sessions. If there are any items you want to discuss please bring them up in our initial session.

Again welcome. Let's get started with your journey!

**Keveyonna Davis, LMT, C.P.C.**



## Client Data Sheet

Date Prepared:

Name:

Address:

Home Phone:

Work Phone:

Cell Phone:

Email:

Birth Date (Mo/Day):

Spouse/Partners Name:

Spouse/Partners Birth Date:

No. of Children: [Boys    Girls    ]

Anniversary Date:

\*\*\*\*\*

Please complete as much of the following as possible. **If you are unsure of any of these answers, don't worry as we will work on these things together anyway.**

### VISION: "Our Guiding Star"

What is your vision? The more succinct you are able to make this, the better. Please leave out specific goals (e.g. lose 10 lbs in 8 weeks or increase revenues by 10% in three months). If this is not now clear for you, leave this blank for now.

### CURRENT CHALLENGES

What are you facing right now that needs immediate focus or resolution?

### STRENGTHS

What are the personal and professional qualities that you have that help you win?



## BLOCKS AND WEAKNESSES

What is it about you that stops you or makes it difficult for you to meet or exceed goals?

## VALUES

Your values are the qualities of life that you find most attractive. They are expressions of yourSelf and allow you to feel truly fulfilled. What do you feel are your true values? If this is not now clear for you, leave this blank for now.

- 1.
- 2.
- 3.
- 4.

## 10 GOALS

Name 10 goals you would like to achieve in the next 90 days

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.



## Client Agreement

**INSTRUCTIONS:** Please review and return to me as soon as possible via email with the attachment indicating in the body of the email that you have read and agree with the attached.

This agreement is entered into by: \_\_\_\_\_ ("Client") and Keveyonna Davis ("Coach"), and pertains to Life Coaching for Personal or Professional Development which shall occur via telephone, via e-mail or in person, as negotiated between Client and Coach.

**Definition of Coaching:** *"Professional Coaching is an ongoing professional relationship that helps people produce extraordinary results in their lives, careers, businesses or organizations. Through the process of coaching, clients deepen their learning, improve their performance, and enhance their quality of life. In each meeting, the client chooses the focus of conversation, while the coach listens and contributes observations and questions. This interaction creates clarity and moves the client into action. Coaching accelerates the client's progress by providing greater focus and awareness of choice. Coaching concentrates on where clients are now and what they are willing to do to get where they want to be in the future. ICF member coaches recognize that results are a matter of the client's intentions, choices and actions, supported by the coach's efforts and application of the coaching process."*

- Source: International Coach Federation ([www.coachfederation.org](http://www.coachfederation.org))

### The Client understands and agrees to each of the following provisions:

- A) I hereby employ Keveyonna Davis as my "Coach" for the purpose of advising and guiding me with respect, to the proper format for Life Coaching for Personal or Professional Development. She may also assist me in structuring, identifying and achieving goals as she has experience in such matters and agrees to render such services.
- B) I understand and agree that the Coach is not an "employment agent," "business manager," "financial analyst" or "psychotherapist" and that he has not promised, shall not be obligated to, and will not: (1) procure or attempt to procure any employment, business or sales for me, (2) perform any business management functions such as accounting services, advice on tax matters or the investment of funds, and (3) will not act as a therapist, counseling me or providing psychoanalysis, group therapy or behavioral therapy.
- C) I further understand and agree that as a specialized form of consulting, Coaching is not the same as professional or licensed therapy; and that I am always free to reject any advice, suggestions or requests made by the coach at any time. My coach is authorized and encouraged to be direct and unconditionally supportive with me.
- D) I further understand and agree that I am to inform my Coach whenever I am under the care of any healer or licensed physician, therapist or psychiatrist; and/or any time I am taking any prescriptions or drugs.

### Duration of Agreement:

The duration of this agreement shall be by a "by-self-appointment-basis only. You understand that you are the only one that truly knows when you have come to a comfortable place of balance in your life, and can schedule or not schedule my coaching sessions as needed.



**Scheduled Coaching Sessions:**

Client understands and agrees to meet the coach via Zoom or in-office, at the following rate as agreed: **\$50.00 per session.**

The Client is to make their coaching sessions with the coach a priority. We will meet on agreed times and dates, excluding holidays and breaks. All calls will last 30 min except if doing the coaching + walking meditation coaching sessions, which last 45 min.

**Re-Scheduled & Missed Coaching Sessions:** Client understands and agrees to make coaching sessions a priority, and to arrive/call on time for scheduled appointments. Client further understands and agrees that if they have not rescheduled a session 24 hours in advance, or does not call or show up to your session the coach within 15 minutes of a scheduled coaching time, the coach will assume the client has elected not to avail themselves of the opportunity to make their session, and will charge the client a \$10 NO SHOW, NO CALL fee. **No other sessions can be made, until the fee has been paid.**

AS A CLIENT, I UNDERSTAND AND AGREE THAT I AM FULLY RESPONSIBLE FOR MY WELL BEING DURING MY COACHING CALLS, 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. I ALSO ACCEPT THAT IF MY COACH SUSPECTS THAT I OR SOMEONE I KNOW COULD BE IN A HARMFUL SITUATION MY COACH CAN CONTACT THE POLICE AND THE CLIENT CONFIDENTIALITY CLAUSE WILL BE NULL AND VOID.

Above agree via telephone on \_\_\_\_\_

**CLIENT'S SIGNATURE: (An email reply with this attachment and an indication of acceptance of these terms in the body of the email will suffice.)**

X\_\_\_\_\_



## Client Guidelines

### FEE

Your fee is due before your coaching services are provided. Payments are expected to be made before your session takes place. I do not send an invoice unless requested. Payment options include cash, check, bank transfers or the following credit cards: MC, VISA, Discover and American Express.

### SESSION PROCEDURES

I will call you or meet with you in-office at the scheduled times and dates agreed on. Procedures of this agreement shall be by a "by-self-appointment-basis" only. Meaning there are no session commitments. You understand that you are the only one that truly knows when you have come to a comfortable place of balance in your life, and can schedule or not schedule my coaching sessions as needed.

### CHANGES

If the need arises, please give me 24 hours notice and we will reschedule. Without proper notice, scheduled time missed will be lost. I request you to make our time together a priority. If you go on an extended trip and need to rearrange our time, please let me know in advance.

### EXTRA TIME OR JUST WANT TO UPDATE ME ON PROGRESS

You may call between our appointments if you need assistance, have a problem, or can't wait to share a success with me. I encourage you to take advantage of this opportunity. This is an extra and I do not bill for this time, but I do ask that you use it respectfully. E-mail communications only.

### PROBLEMS

If I ever say or do anything that upsets you or doesn't feel right please bring it to my attention. I promise to do what is necessary to have you be satisfied. Honesty and trust are critical for our relationship to grow. I want this to be an open and safe place for you to come with confidence.

### CONFIDENTIALITY

Confidentiality is critical to our relationship--our coaching sessions are strictly confidential. Any subject discussed and/or items shared, including such things as personal information, future plans, proprietary information, goals, job and company information, will remain confidential.

### TYPE OF RELATIONSHIP

We have entered into a coaching relationship and it is not, nor will there be any type of therapy or psychological counseling. If these are needed, then it is your responsibility to seek these services from the relevant professional. If there is any question about this relationship, please bring it to my attention immediately.

### REFERRALS

My business is grown through referrals. I am very grateful for any referrals you send my way. For any referral you send my way who becomes a client of mine, you will receive a \$5 credit on your client account to use towards a coaching session.

### FEEDBACK

I improve my offering through client feedback, positive and negative. Included in this Welcome Pak is a form for a testimonial. Within the first month if you feel so compelled I would appreciate a testimonial for use in marketing.



## ICF CODE OF ETHICS

### Part One: Definition of Coaching

#### Section 1: Definitions

- **Coaching:** Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.
  - **A professional coaching relationship:** A professional coaching relationship exists when coaching includes a business agreement or contract that defines the responsibilities of each party.
  - **An ICF Professional Coach:** An ICF Professional Coach also agrees to practice the ICF Professional Core Competencies and pledges accountability to the ICF Code of Ethics.
- In order to clarify roles in the coaching relationship, it is often necessary to distinguish between the client and the sponsor. In most cases, the client and sponsor are the same person and therefore jointly referred to as the client. For purposes of identification, however, the International Coach Federation defines these roles as follows:
- **Client:** The "client" is the person(s) being coached.
  - **Sponsor:** The "sponsor" is the entity (including its representatives) paying for and/or arranging for coaching services to be provided.
- In all cases, coaching engagement contracts or agreements should clearly establish the rights, roles, and responsibilities for both the client and sponsor if they are not the same persons.

### Part Two: The ICF Standards of Ethical Conduct

*Preamble: ICF Professional Coaches aspire to conduct themselves in a manner that reflects positively upon the coaching profession; are respectful of different approaches to coaching; and recognize that they are also bound by applicable laws and regulations.*

#### Section 1: Professional Conduct At Large

##### As a coach:

- 1) I will not knowingly make any public statement that is untrue or misleading about what I offer as a coach, or make false claims in any written documents relating to the coaching profession or my credentials or the ICF.
- 2) I will accurately identify my coaching qualifications, expertise, experience, certifications and ICF Credentials.
- 3) I will recognize and honor the efforts and contributions of others and not misrepresent them as my own. I understand that violating this standard may leave me subject to legal remedy by a third party.
- 4) I will, at all times, strive to recognize personal issues that may impair, conflict, or interfere with my coaching performance or my professional coaching relationships. Whenever the facts and circumstances necessitate, I will promptly seek professional assistance and determine the action to be taken, including whether it is appropriate to suspend or terminate my coaching relationship(s).
- 5) I will conduct myself in accordance with the ICF Code of Ethics in all coach training, coach mentoring, and coach supervisory activities.
- 6) I will conduct and report research with competence, honesty, and within recognized scientific standards and applicable subject guidelines. My research will be carried out with the necessary consent and approval of those involved, and with an approach that will protect participants from any potential harm. All research efforts will be performed in a manner that complies with all the applicable laws of the country in which the research is conducted.
- 7) I will maintain, store, and dispose of any records created during my coaching business in a manner that promotes confidentiality, security, and privacy, and complies with any applicable laws and agreements
- 8) I will use ICF member contact information (e-mail addresses, telephone numbers, etc.) only in the manner and to the extent authorized by the ICF.

#### Section 2: Conflicts of Interest



**As a coach:**

- 9) I will seek to avoid conflicts of interest and potential conflicts of interest and openly disclose any such conflicts. I will offer to remove myself when such a conflict arises.
  - 10) I will disclose to my client and his or her sponsor all anticipated compensation from third parties that I may pay or receive for referrals of that client.
  - 11) I will only barter for services, goods or other non-monetary remuneration when it will not impair the coaching relationship.
  - 12) I will not knowingly take any personal, professional, or monetary advantage or benefit of the coach-client relationship, except by a form of compensation as agreed in the agreement or contract.
- ICF – Advancing the Art, Science and Practice of Professional Coaching Page 3 of 4*

### **Section 3: Professional Conduct with Clients**

**As a coach:**

- 13) I will not knowingly mislead or make false claims about what my client or sponsor will receive from the coaching process or from me as the coach.
- 14) I will not give my prospective clients or sponsors information or advice I know or believe to be misleading or false.
- 15) I will have clear agreements or contracts with my clients and sponsor(s). I will honor all agreements or contracts made in the context of professional coaching relationships.
- 16) I will carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement or contract.
- 17) I will be responsible for setting clear, appropriate, and culturally sensitive boundaries that govern any physical contact I may have with my clients or sponsors.
- 18) I will not become sexually intimate with any of my current clients or sponsors.
- 19) I will respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement or contract. I will be alert to indications that the client is no longer benefiting from our coaching relationship.
- 20) I will encourage the client or sponsor to make a change if I believe the client or sponsor would be better served by another coach or by another resource.
- 21) I will suggest my client seek the services of other professionals when deemed necessary or appropriate.

### **Section 4: Confidentiality/Privacy**

**As a coach:**

- 22) I will maintain the strictest levels of confidentiality with all client and sponsor information. I will have a clear agreement or contract before releasing information to another person, unless required by law.
- 23) I will have a clear agreement upon how coaching information will be exchanged among coach, client, and sponsor.
- 24) When acting as a trainer of student coaches, I will clarify confidentiality policies with the students.
- 25) I will have associated coaches and other persons whom I manage in service of my clients and their sponsors in a paid or volunteer capacity make clear agreements or contracts to adhere to the ICF Code of Ethics Part 2, Section 4: Confidentiality/Privacy standards and the entire ICF Code of Ethics to the extent applicable.

### **Part Three: The ICF Pledge of Ethics**

As an ICF Professional Coach, I acknowledge and agree to honor my ethical and legal obligations to my coaching clients and sponsors, colleagues, and to the public at large. I pledge to comply with the ICF Code of Ethics, and to practice these standards with those whom I coach.

If I breach this Pledge of Ethics or any part of the ICF Code of Ethics, I agree that the ICF in its sole discretion may hold me accountable for so doing. I further agree that my accountability to the ICF for any breach may include sanctions, such as loss of my ICF membership and/or my ICF Credentials.





*Approved by the Ethics and Standards Committee on October 30, 2008.*  
*Approved by the ICF Board of Directors on December 18, 2008.*



Client name: \_\_\_\_\_

Thank you for participating in my quest for testimonials. I use the PAR system which asks for the problem, the solution and the result. I'd be delighted to hear from your perspective how our coaching sessions benefited you in this fashion:

**PAR:**

- **Problem or challenge the client had**
  
  
  
  
  
  
  
  
  
  
- **Action client took along with coach**
  
  
  
  
  
  
  
  
  
  
- **Result –what was the result?**
  
  
  
  
  
  
  
  
  
  
- **Name two things the coach could have done better.**

If you feel compelled to complete a testimonial please email this to be with an indication as to whether or not you are happy for me to use this in my marketing materials.

To Personal Wellness & Health!  
Keveyonna Davis, LMT & Coach