Designing the Coach/Client Relationship

Class #1. Setting up the Right Systems for Success

We'll cover all the nitty gritty in this first class: payment options, coaching agreements/contracts, intakes, prep forms, assessments, client extras, gifts, long-term coaching vs. limited engagements, bundling products, etc. Also, steps to clarify the client's expectations.

This mini-module has a number of purposes:

- To give you the clarity you need to feel confident about attracting clients and coaching them
- To give you awareness of some of the issues that may come up with your new clients
- To help you get started designing systems that work for you and that optimize your time and effort
- To give you resources that may help you run your business more easily
- And in our second class, help you become aware of some of the ways that you can establish your relationship to minimize problems

Congratulations! You have a new client.

This is what most new coaches dream about and yet, many coaches dread this moment, because they're not quite sure what to do once they have a new client. If that's the case for you, then you may actually STOP yourself from attracting new clients, even though you're working hard at marketing.

Fortunately, the solutions for this problem are fairly simple.

1. This class will clear up many of the unknowns in situations like this
2. Any questions that aren't covered in this class can be answered by your mentor coach (you do have one, don't you?)
3. 'Experiment, observe, tweak and repeat' are the best ways to build certainty about your systems and by definition, that means you'll make a few mistakes
4. It's okay to make mistakes, because your clients will forgive you for them (in fact, they'll be relieved, because they'll feel more comfortable sharing their own mistakes with you)
5. Give up your perfectionism and your need to be invulnerable if you want to succeed. Both are unattractive, because they are all about you

"Amateurs might not have coaches, but professionals do." - Robert Kiyosaki

During your complimentary session or sales conversation, you want to find out what really matters to you client and communicate if you can help with that. Once you've offered to work with them and they've said, 'Yes' , clarify what that means and then follow that up right away with a welcome letter and coaching agreement that detail your schedule and payments..

Let's start with payments. You're in business to get paid. We cover setting and raising your fees in Coach 100, so for this class, we'll assume you and you client have agreed on a payment amount. Suffice it to say, that if you don't charge them enough, your clients won't get full value, because they won't be invested enough. By the same token, you must charge enough to cover your business expenses and time, including the time you spend marketing.

The next step is to agree on when, how often and by what method your clients will pay you.

Do this as soon as your client has told you they want to work with you. Immediately suggest that you set up a schedule of appointments, or at least your first appointment. Once that's clear, turn to payment terms. Don't leave it until later.

One of the toughest problems any business person can have is getting clients who have already been served to pay. You don't have to have this problem. With today's payment options, you can set this up so it virtually never becomes a problem.

Step #1 is to have your clients pay you in advance. This is common, so don't apologize for it. Here are possible ways to do it:

- Require that your clients pay you by the 1st of the month or at least before the first/next session
- Set up an automatic payment system ('subscription' or 'repeat payments'). This can easily be set up with Paypal or a shopping cart, if you have one. The client will automatically be charged at mutually agreed upon payment increments and you and they don't have to do anything once it's set up. It can be turned off when the coaching relationship is over or you can set it to turn off automatically at a future date.
- Take your client's credit card information over the phone and charge them at mutually agreed upon increments via Paypal, Propay or a merchant account if you have one
- Allow your client to pay by check, but still require them to pay in advance. If their check is late or bounces, it's up to you whether you give them their scheduled sessions, but don't give more sessions than you can afford not to be paid for
- If you build a trusting relationship, you'll have minimal problems here, because your client will most likely want to keep that trust

Step #2 is to have your clients pay you for blocks of coaching, not by the session. Again, this is common. No need to apologize. Possible options:

- Charge your clients by the month rather than the session. This helps bring home that it's not your time they are buying but the value they get from working with you
- Some coaches charge for more than a month, such as three to six months. This is especially common in business and corporate coaching, which are usually limited engagements of three to six months of service
- Whatever size block you charge for, you may want to charge more for the first block than for subsequent blocks, because setting up a new client can be time consuming. It also means the client may be more invested in the coaching
- If you do allow clients to buy one session (not uncommon when a former client asks for just one session to work a specific problem) charge more for it than you would if it was part of a block of sessions

Spell out your payment agreement in a written coaching agreement. Send it immediately to your client with any coaching materials that you want them to have. This is known as a 'welcome packet'. You can mail a welcome packet in paper form, but emailing is much easier, faster and better for the environment. Clients are impressed when they receive it immediately.

Welcome Packets are covered in Coach 100, but here is info about your agreement:

- Your agreement clarifies what's expected of and by both of you
- It helps you avoid misunderstandings and it can help create confidence and trust
- Reiterate anything you've agreed upon verbally in your written agreement
- Spell out additional issues that you didn't talk about
- An agreement can be written by you or by you and your client
- You may want an attorney to help you create your initial coaching agreements
- An attorney can help you identify potential legal problems. This is the most secure way to go
- Refer to the IAC Code of Ethics to help you understand issues that may be important to spell out in your agreement

Some issues to consider when creating an agreement (this is a limited list, get professional assistance to help build an 'iron-clad' agreement)

- Welcome your client warmly and mention that if they have any concerns about what is in the agreement to just let you know
- Spell out the schedule and date/time of first meeting. Mention whether there will be any reminders sent to them
- Spell out whether this coaching is an open engagement or of specific duration
- If there will be an intake, explain that so the client understands
- If there are assessments, explain and include any links to those
- Mention any client extras or additional bundled products included and how the client will access those

- If you are giving the client a welcome gift, you may want to mention that, if appropriate
- You may want to mention specific ‘deliverables’ the client can expect from your coaching, such as strategies, brainstorming, insights, etc. Use language the client will understand
- Explain what coaching is not. This may vary according to your niche or specialty, but it’s a good idea to mention that coaching is not psychotherapy.
- Mention policies for refunds, missed sessions, and make-ups, if any
- If you would like to record sessions for future certification, you must get written permission. Ask at the bottom of your agreement
- Sign and date it and leave a space for the client to do the same. Ask them to fax the agreement back to you

Some coaches like to do an ‘intake session’ at the beginning of the coaching relationship.

- This is usually a longer session
- You can use it to get to know your client better and collect details about family etc.
- This is also a good time to go over any assessment results
- Or you can include an intake form with your agreement and just let the client fill in the information you want
- Some coaches include coaching questions with their intake forms, such as, ‘What have you always wanted to be?’, ‘What are your favorite excuses for not following through on things?’

You may want to send a coaching call ‘prep form’ with your agreement and intake, but beware of overwhelming the client with too much stuff. They probably won’t read most of it.

Some coaches like to provide ‘client extras’ for their one-to-one coaching clients. Here are a few examples:

- Allow a client to take a course that you teach that’s related to their coaching focus
- Send the client some previously recorded seminars
- Include a book or workbook, either written by you or someone else
- Include the client in a special community
- Include extra laser coaching or just-in-time coaching
- Include group coaching
- None of these are necessary. You may want to experiment to find what’s most valuable and for and valued by your clients

A variation on ‘client extras’ are bundled products, similar to those above. The distinction is that the client is buying the bundle. Get creative with this and you may discover some excellent ways to package your coaching so that clients are more likely to say, ‘Sign me up!’

This is a lot, but the most important thing to know about your coaching agreement and your welcome packet is that they are always 'works in progress'. (I learned that from my first mentor coach.) Don't wait to perfect. Put together something good, experiment with it, observe the results, and tweak. Then repeat.

"If you have everything under control, you are not moving fast enough" - Mario Andretti

Resources:

View examples of welcome letter, agreement, and prep form

Payment options:

http://paypal.com*

http://propay.com*

You local bank probably can set up a business account or merchant account for you

Shopping carts:

http://1shoppingcart.com*

http://checkout.google.com

http://payments.amazon.com

IAC Code of Ethics:

http://certifiedcoach.org/ethics/principles.html*

*** Services without asterisks have not been tried by me. I am an affiliate of Paypal and 1ShoppingCart and I would recommend them, even if I weren't**