



Tactical coaching for life, leadership, and legacy

Client Welcome Form

I'm looking forward to walking with you during this season as you enter more fully into your unique plan for leadership and personal growth!

Following are a few guidelines we need to establish to make our working relationship as productive as possible. If you have any questions, please call me.

Procedure

- **Scheduled calls/Zoom meetings** need to be received on time. Calls/meetings will be roughly **30-45 minutes in length**.
- Please complete the enclosed 'Client Preparation Form' and **email it 24 hours prior to each call**. This allows me to be as prepared as possible to make the best use of your time.

Calls

- Our agreement includes a set number of scheduled calls.
- If you or I am unable to keep a regularly scheduled call, we will compare calendars in advance and **book another time**.

Changes & Cancellations

- Cancellations need to be made at least **24 hours in advance**.
- If you had a valid emergency causing you to miss a call, we will work around it.
- Otherwise, missed calls are **not made up nor refunded**.

Extra Time / Spot Contacts

- You are encouraged to contact me between scheduled calls by **email, text or 'spot calls'** (~5 minutes or so in length).
- This is for questions, struggles, thoughts, praise reports, or just to touch base.
- These contacts are **included in your monthly fee**. Those who use this extra level of service tend to make greater progress.

Fees

- Payment is made by **Visa, MasterCard, or American Express, or Venmo**.
- Payment is billed one or two business days prior to each month **unless other arrangements have been made**.

Follow-through and Problems

- Our relationship needs to be based on absolute honesty with each other. If at any time you are dissatisfied with something, **please bring it up!** I will work with you to resolve any difficulties.
- It is imperative that you **apply yourself** if coaching is to be successful.
- Our work will sometimes be very purposeful, goal-directed, and dependent on you doing some **'homework'**. Other times, it will be broad in scope, requiring time for reflection, prayer, and meditation on your vision, goals, and plan for your life.
- Your real growth will come from the work you do in the time **between our calls**.
- I do not have all the answers you are looking for, but I will walk faithfully with you as you seek them. Check yourself now on the true measure of your commitment to that kind of pursuit.