

New Pathways Counseling and Coaching

Maria Rodriguez-Fischer
LCSW, Life Coach

3721-A University Dr., Durham, NC 27707
Tel.: (919) 401-8261

Client policies and procedures

Welcome!

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

- Fee* Clients pay on time unless prior arrangements have been made. Payment may be made by check or credit card.
- Procedure* Clients are on time for sessions (in person or calls). I ask that you come to the session with updates, progress, and current challenges. Let me know what you want to work on, and be ready to be coached. I will email or fax to you a client prep form for you to complete before a session. Please complete and fax or e-mail the form to me before each session. The agenda is client generated and coach supported.
- Calls* Our agreement includes a set amount of sessions. If you or I are on vacation, then we spend more time before you/I leave and after you/I return.
- Changes* I ask that clients give me a 24 hour notice if they have to cancel or reschedule a session. If you have an emergency, we will work around it.
- Extra Time* Calls between sessions are reserved for when you need "spot coaching," have a problem, or can't wait to share a win with me. (You can also fax or e-mail 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 extra calls to 5 or 10 minutes. 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 promise to do what is necessary to satisfy your coaching needs.
- A Must* It is necessary for the client to implement the coaching in order to experience success. You have hired a coach to help you do things differently than you have ever done them 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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Client Data Form

Date: _____

Name: _____

Occupation: _____

Business Name: _____

Home address: _____ Preferred address

Business address: _____ Preferred address

Day Phone: _____ Evening phone: _____

Fax line: _____ Cell phone: _____

E-mail address: _____

Okay to leave messages everywhere? _____ If not, explain: _____

Preferred means of communication: _____

Date of birth: _____ Age: _____

Other significant dates: _____

Preferred coaching schedule:

on (day of week): _____ at (time of day): _____

Names of important people in your life (spouse, partner, children, friends, etc.):

Emergency contact: _____

Other information you want me to know (you may continue on back of page):

How did you hear about New Pathways CC? _____