

## WELCOME

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My name is Bosede Santos and I am a Christian Life Coach. I am truly looking forward to walking with you during this season as you enter more fully into the unique plan God has for you! Please read through the following guidelines that will help us both establish the most fruitful working relationship. Also, please complete the assessments in order for me to understand where you are, on your way to where you believe God wants you to be. It will also help you connect with and visualize things as they currently are. I will encourage you to make a serious commitment to coaching, and provide yourself with adequate time to progress. Coaching is an investment in yourself. The benefits multiply themselves for a lifetime. Do not hesitate to contact me if you need further clarification on any of the points.

- Procedure**      Scheduled calls need to be received on time. Calls will be roughly 30 - 45 minutes in length. **Please fill out the enclosed 'Coaching Prep Form' and email the completed form at least 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 are unable to keep a regularly scheduled call, we will compare calendars in advance and book another time. It is your responsibility to call me.
- Changes**        **Cancellations need to be made at least 48 hours in advance.** If a valid emergency arises, causing you to miss a call, we will work around it. Otherwise missed calls are neither rescheduled nor refunded.
- Extra time**      You are encouraged to contact me between scheduled calls by email, or 'spot calls' (5 minutes or thereabouts in duration) with questions, struggles, thoughts, praise reports, or just to touch base. These contacts are included in your monthly fee. I enjoy delivering this extra level of service and find that those who use it seem to make greater progress.
- Fees**             Payment is made by Paypal, Visa, MasterCard, or American Express and is billed one or two business days prior to each month unless other arrangements have been made.
- Problems**        Our relationship needs to be based on absolute integrity with each other. If at any time you are dissatisfied with something, please bring it to my attention. I will work with you to resolve any issues.
- Follow-through**    It is imperative that you apply yourself for coaching to be successful. Our work will sometimes be very purposeful, goal-directed and dependent on you doing some 'homework'. Other times it will be very broad in scope, requiring time in prayer, reflection and meditation on God's word, His plan for your life, your vision, etc. Either way, **your real growth will come from the work you do in the time between our calls.** I do not have the answers you may be looking for, but I will walk faithfully with you as you seek them from the One who does. Check yourself now on the true measure of your commitment to that kind of pursuit. **Make this a pivotal season of your life!**

## *The Client/Coach Relationship: An Overview*

It is important to understand the coaching relationship so that you can get the most of our time together. As your coach, you have my undivided attention. I am committed to you and your best interests. I will ask the tough questions and reflect back to you what I hear. I will challenge you and encourage you to explore new avenues. To succeed, you must be ready, willing and able to make changes. Finding and communicating your truth is an essential element in the coaching relationship. Clarity is important. Your truth is safe. No vision is too big. I am here to champion your cause.

Coaching is not therapy! If I sense issues that may be preventing you from moving forward and counselling might be a better fit for you, I will inform you, and where agreeable, recommend a service to you. My strengths in helping you are in quickly getting to the heart of an issue, creative reflection, practical strategies and energizing motivation. I strive to help my clients not only to achieve what they set out to do, but also increase self awareness and attain a healthy balance in life.

You set the agenda of the calls. I will make requests of you. It is your option to accept or reject those requests, or modify them to make them work for you better. My guarantee to you is that I will do what I say I will do. You are responsible to take the actions.

If there is a lack of clarity over any issue, please ask questions. I will not be timid to discuss issues. I will be direct, but always respectful of you in making an observation. I will often ask you to explore ideas that may be beneficial, but I will not tell you what to do. I will support you in deciding your best course of action. As your coach, I am a resource and a presence, to empower your monologue.

### *My Clients are Chief*

- You are free to email or call me between scheduled appointments at no additional cost if you have a victory to share or a challenge that needs immediate attention. While I am pleased to provide this extra service, I do ask that such calls be kept to a maximum of five minutes or thereabouts. You always have unlimited access to me by e-mail. I will usually get back to you within twenty-four hours, Monday through Friday. If I am going to be out of town or otherwise unavailable, I will let you know that.
- It is very important that you communicate the truth to me in order to receive the maximum benefit from your coaching experience. It is my goal to make coaching a valuable experience for you. Everything that we discuss is confidential, within the confines of the law.
- We will discuss ideas, alternatives, possibilities and options, but ultimately, the decisions are yours!
- If you feel I am pushing you too hard, or even not hard enough, let me know. If I say something that doesn't feel right, let me know that too.

### *Coaching Options:*

**Monthly by Telephone:** Coaching on the telephone, weekly, at a pre-scheduled time. Your monthly fee includes our agreed option. It is reasonable to work together for 6 months in order to see measurable results, however our agreement is open ended. The onus is on you to call me at the pre-arranged time. *(Please refer to the agreement form).*

**Spot Coaching:** This is for specific problem solving issues as they come up and does not include regularly scheduled calls. This is on a retainer basis and as needed. This is included in your fees

**Affinity Group/Retreat Coaching:** Group coaching is never a substitute for individual work but can be an effective alternative, particularly for those who want a group experience or are in the midst of financial challenges. While

there is support in such a group, it is not to be confused with a support group. Groups meet for one hour, twice a month and have access by email between sessions. An agreement to confidentiality and session focus is required. Minimum group size is five people – maximum eight, meeting together on a telephone bridge line. The cost will be \$650 USD per person, per month. All participants must be coachable and agree to a six month commitment.

***Payment Policies:***

- Advance payment is due prior to your first coaching session and is payable monthly, in advance. Paying by credit or debit card, proves to be the most convenient for all. Paypal, Visa, MasterCard and American Express are accepted. The charge for coaching services shows up on your credit card as ***PromotingChampions***. Receipts are issued on request. The charge will be processed two days prior to the session in the billing period and charged monthly for the duration of the agreed term.
- If you wish to pay three or more months in advance, you will receive a 5% discount on the total amount billed. If your circumstances change and you interrupt coaching services for a time, the credit will be carried on your account so you can return when it works for you.
- If you prefer, you may make your payments through eTransfer sent to [coaching@bosedesantos.com](mailto:coaching@bosedesantos.com). Please remember to advise me of the necessary details.
- When you feel ready to discontinue coaching, fourteen days notice will be required.

I acknowledge that I have read, understood and agree to honour the above parameters in working with my coach.

Client's signature \_\_\_\_\_

Date \_\_\_\_\_  
(mm/dd/yyyy)

## GETTING TO KNOW YOU

*Our coaching relationship will be more effective if you can disclose some information about yourself on the outset. Your information will remain confidential and you are free to leave unanswered any of the questions. The more you complete, however, the better I will know you and be able to provide the best coaching experience for you.*

### PERSONAL/FAMILY INFORMATION

Name \_\_\_\_\_  
Title Last Name First Name Preferred Name

Address \_\_\_\_\_  
House/Apartment Number Town State/Province

Postal/Zip Code Country

Daytime Phone \_\_\_\_\_ Evening Phone \_\_\_\_\_  
(Please enter both country and area codes) (Please enter both country and area codes)

Cell/Mobile Phone \_\_\_\_\_ Email \_\_\_\_\_  
(Please enter both country and area codes)

Preferred Contact Mode: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
(mm/dd/yyyy)

Marital Status: ☐ Single ☐ Engaged ☐ Married ☐ Divorced ☐ Widowed

Spouse's Name (if married): \_\_\_\_\_ Spouse's Birthday: \_\_\_\_\_  
(mm/dd/yyyy)

Child 1: \_\_\_\_\_ Birthday: \_\_\_\_\_  
(mm/dd/yyyy)

Child 2: \_\_\_\_\_ Birthday: \_\_\_\_\_  
(mm/dd/yyyy)

Child 3: \_\_\_\_\_ Birthday: \_\_\_\_\_  
(mm/dd/yyyy)

Child 4: \_\_\_\_\_ Birthday: \_\_\_\_\_  
(mm/dd/yyyy)

### PROFESSIONAL INFORMATION

Profession: \_\_\_\_\_ Company: \_\_\_\_\_

Address: \_\_\_\_\_

Position: \_\_\_\_\_ Professional Aspirations: \_\_\_\_\_

Professional Challenges: \_\_\_\_\_

## OTHER INFORMATION

Are you or have you ever been in counselling or therapy? ☐ Yes ☐ No If yes, please explain \_\_\_\_\_

\_\_\_\_\_

Briefly explain why you want coaching \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please state your reason(s) for choosing me as your coach \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please list up to 10 things you want me to know about you.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

Please list the three goals you would like to achieve within the next 90 days.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*(I would advice that you work through the following section, and please be as detailed as you possibly can. This will help you to recognize your starting point and also help me understand your ideals.)*

**Vision:**

What is your personal vision?

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**Mission:**

What is your personal mission statement?

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**Life Purpose:**

What differences are you committed to make for yourself and others? What is truly most important for you? If this is not clear for you, leave this blank for now.

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**Current Challenges:**

What are you dealing with right now that needs immediate attention or resolution?

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**Strengths:**

What do you see as your personal and professional strengths & qualities?

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**Blocks and Barriers:**

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

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**Regular “Self-Care” Activities:**

What things do you do on a regular basis that keep you physically, mentally, emotionally, and spiritually well?

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**Personal Values:**

Our personal values are the very essence of who we are. What are your personal values?

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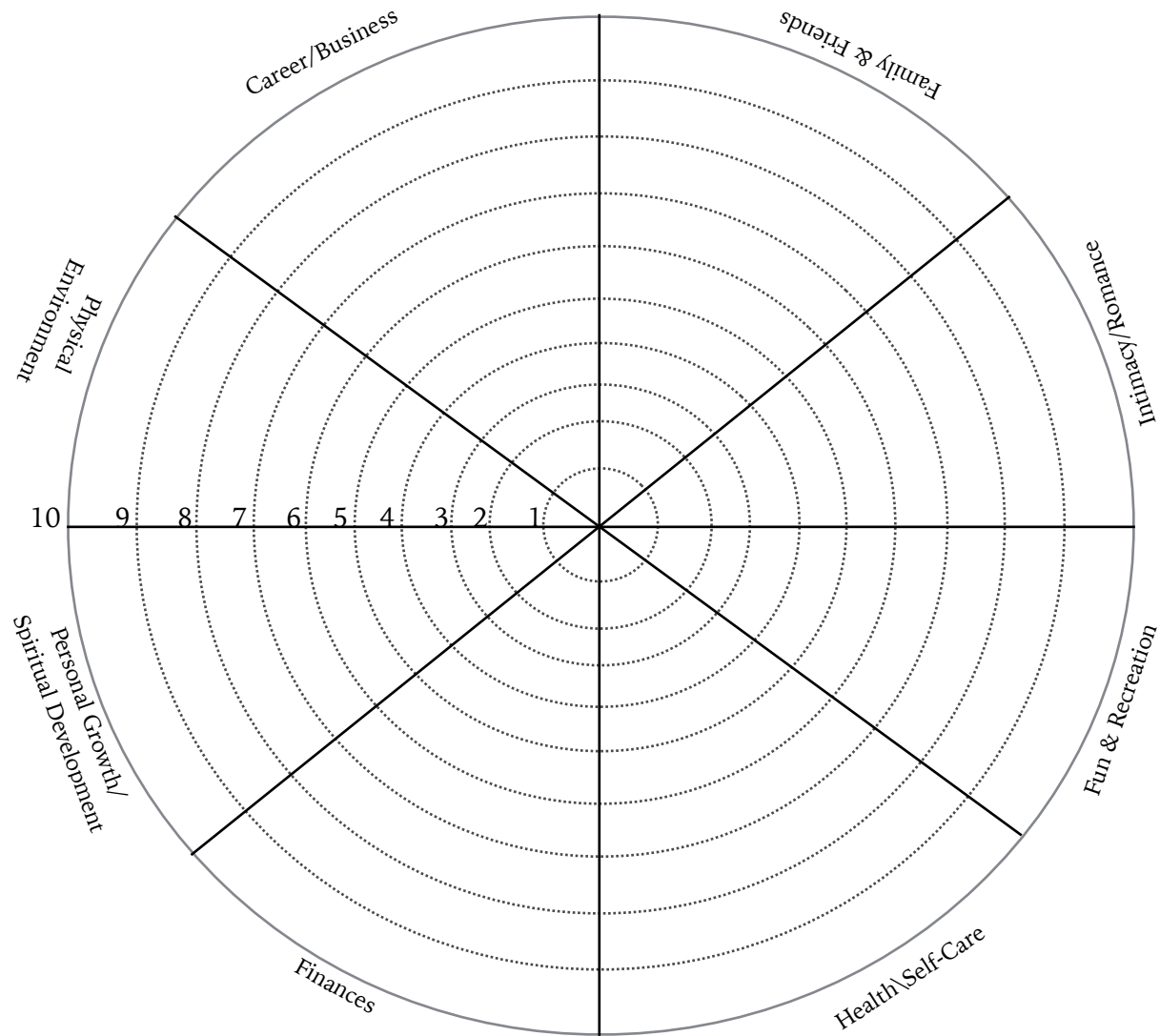
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(Please use the following space to continue on any of the points above or write any other information you may wish to share with me)

## WHEEL OF LIFE

**Directions:** The eight sections in the Wheel of Life represent different aspects of your life. Seeing the center of the wheel as 1 and the outer edges as 10, rank your level of satisfaction with each life area by drawing a straight or curved line to create a new outer edge. The new perimeter represents the wheel of your life. If this were a real wheel, how smooth or bumpy would the ride be?



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## GRAPH OF LIFE

*"The master was full of praise. 'Well done, my good and faithful servant. You have been faithful in handling this small amount, so now I will give you many more responsibilities. Let's celebrate together*

*~Matt 25:21 NLT*

**Directions:** How satisfied are you with the different parts of your life? Circle a number from 1-10 next to each of the following areas of life. A 10 indicates that you are completely satisfied and could not be happier with that part of your life. 1 means you are completely dissatisfied. Your overall satisfaction will change from day to day, but try to give an overall assessment of where you are presently. Skip any item that does not apply to you. Please join the circles together to make a graph. When this is completed, please complete the form again, but this time, put a square around your preferred position were things ideal. Once again, join the squares. Note the areas that have the largest gaps between your current reality and your preferred future. These areas indicate areas where coaching would be beneficial to you.

1	2	3	4	5	6	7	8	9	10	
										Physical Health
										Mental/Emotional Health
										Career/Employment Satisfaction
										Financial Stability
										Marriage/Romantic Relationship
										Home Life (immediate Family)
										Extended Family (Relatives, In-Laws)
										Friends/Social Life
										Recreation/Relaxation
										Lifestyle (Degree of Busyness)
										Personal Life Fulfilment
										Personal Spiritual Life
										Church/Religious Life
										Current Ministry
										Physical Comfort (Housing, Location, Cars etc.)
										Other _____
										Other _____



Please post recent  
photograph

## AGREEMENT

(Please complete and sign where indicated and return to me.  
A copy of signed agreement will be emailed to you for your records)

Name \_\_\_\_\_  
Title Last Name First Name Preferred Name

Address \_\_\_\_\_  
House/Apartment Number Town State/Province  
Postal/Zip Code Country

Daytime Phone \_\_\_\_\_ Evening Phone \_\_\_\_\_  
(Please enter both country and area codes) (Please enter both country and area codes)

Cell/Mobile Phone \_\_\_\_\_ Preferred Email \_\_\_\_\_  
(Please enter both country and area codes)

Website (if any) \_\_\_\_\_ Preferred Contact Mode: \_\_\_\_\_

Please check the terms we have agreed to:

- ☐ Four (4) 45-minute coaching sessions & retainer services at \$1,450 USD per month.
- ☐ Three (3) ½-hour coaching sessions & retainer services at \$750 USD per month.
- ☐ Two (2) 45-minute coaching sessions & retainer services at \$730 USD per month.
- ☐ Two (2) ½-hour coaching sessions & retainer services at \$500 USD per month.
- ☐ One (1) 45-minute coaching session & retainer services at \$370 USD per month.
- ☐ Other \_\_\_\_\_

\*Retainer services refer to availability at times other than scheduled phone sessions via email and/or brief 'spot check' phone calls.

- I confirm that I have read the guidelines listed in the 'Welcome' form and agree to abide by them. As a coaching client, I understand and agree that I am fully responsible for my well-being during my time of coaching, including my choices and decisions. No guarantees have been made to me as to the expected outcome of my coaching. 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 necessary.
- I understand that "Life Coaching" is a relationship I have with my Coach that is designed to facilitate the creation/development of personal, professional or business goals and to develop and carry out a strategy/plan for achieving those goals.
- I understand that life coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationship, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
- I pledge that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with this person regarding the advisability of working with a life coach and that this person is aware of my decision to proceed with the life coaching relationship.
- I understand that information will be held as confidential unless I state otherwise, in writing, or as required by law.
- I consent to my Coach keeping a confidential record of my name, phone number or email address in order to meet the requirements for coach credentialing by the International Coach Federation [www.coachfederation.org](http://www.coachfederation.org). This information will be utilized strictly for the purpose of meeting these requirements and, following the credentialing process where two assessors will validate my list and subsequently destroy the two copies, only the master list will be maintained within secure files of the ICF. I agree to allow my coach to document the coaching hours with me for submission to the ICF for certification as a coach.
- I understand that life coaching is not to be used in lieu of professional advice. I will seek professional guidance for legal, medical, financial, business, spiritual or other matters. I understand that all decisions in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my responsibility.

☐ I acknowledge that I have read, understood and agree to honour the above commitment in working with my coach.  
(please tick)

Client's signature X\_\_\_\_\_

Date \_\_\_\_\_  
(mm/dd/yyyy)

Coach's signature X\_\_\_\_\_

Date \_\_\_\_\_  
(mm/dd/yyyy)