The Coaching Agreement

The Coaching Agreement formalizes and sets the parameters for the partnership between coach and client. It is described by the International Coach Federation as being the *"Ability to understand what is required in the specific coaching interaction and to come to agreement with the prospective and new client about the coaching process and relationship" (International Coach Federation, ICF)*

The Coaching Agreement has always been a core ICF Coaching Competency, but in recent years it has received significant attention, and now forms a key part of the ICF PCC Markers, which are a description of the things ICF Assessors look for when credentialing coaches at either the ACC, PCC or MCC level. In other words – it's an important part of the coaching process.

PCC Marker

Competency 2: Creating the Coaching Agreement

1. Coach helps the client identify, or reconfirm, what s/he wants to accomplish in the session.
2. Coach helps the client to define or reconfirm measures of success for what s/he wants to accomplish in the session.
3. Coach explores what is important or meaningful to the client about what s/he wants to accomplish in the session.
4. Coach helps the client define what the client believes he/she needs to address or resolve in order to achieve what s/he wants to accomplish in the session.
5. Coach continues conversation in direction of client's desired outcome unless client indicates otherwise.

https://coachfederation.org/pcc-markers

There are two parts to the Coaching Agreement

- The Coaching Contract (outside the session)
- The Session Agreement (inside the session)

Part A: The Coaching Contact (Outside the session)

As a coach practitioner it's necessary for you to have policies and processes in place to manage the business of coaching. These represent your expectations and are shared with your client as the over-arching terms of engagement. Your partnership begins only when both coach and client have formally agreed to the terms of engagement via a written or online contract.

The information you might want to include would be

- Terms of the agreement (1 session, 6 sessions, unlimited for 3 months etc)
- Coaching Schedule (weekly, monthly, ad hoc)
- Scope of Practice (what coaching is, and isn't)
- Fee Schedule (how much you charge and in what currency)
- Fee Payment (options and timeline for payment)
- Cancellation or reschedule of session policy
- Where and how you will coach (phone, in person etc)
- Statement of Ethics

Refer to ICF Sample Coaching Contract –
https://coachfederation.org/app/uploads/2017/11/SampleCoachingAgreement.pdf

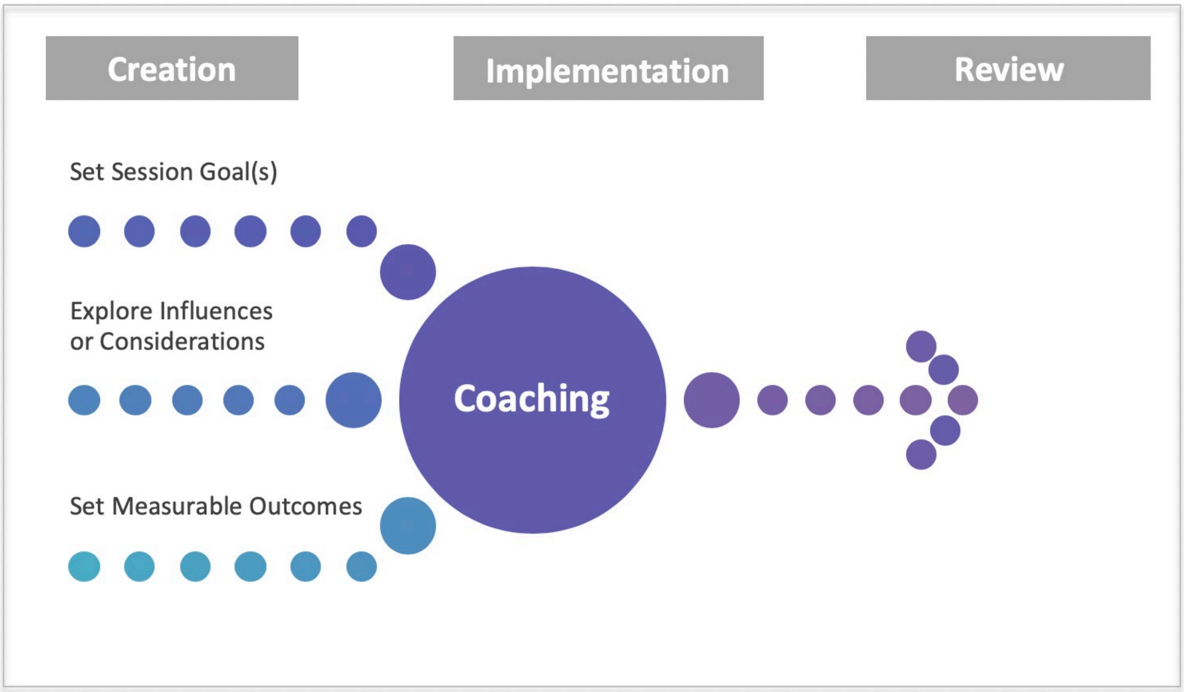
Part B: The Session Agreement (Inside the session)

The second part of your Coaching Agreement happens inside the session. It's where your client shares what they would like to be coached on during that session, and what success at the end of the session would look or feel like for them. Outcomes and measurables are set, along with the exploration of any influences or factors that could get in the way of success.

A session plan is then created. As the coach, you will use this plan to guide the session towards the client's goals, measurables and outcomes and check in mid-session to make sure the client feels they are experiencing progress towards their desired outcome.

The amount of time allocated to establishing the Coaching Agreement is the amount of time it takes to get the clarity around what the client wants or needs. What is driving them, what are they hoping to achieve today, what have they tried before, what has and hasn't worked, and how will they know they have achieved. This could take 2 minutes, or it could take twenty.

Diagram: The Session Agreement as a 3 step process



Note: ACC credentialed coaches are expected to establish goals for the session. PCC credentialed coaches are expected to take this further by establishing goals, outcomes and measurables. All coaches should check in throughout a session to be sure the client feels there is progress towards their desired outcome.

Step 1: Creation

Setting Session Goal(s)

Is your client wanting to identify an issue, explore an issue or solve an issue? This discovery is more than just asking 'check box' questions. It's about drilling down by listening, asking powerful questions, and exploring the 'why' around the presented issue to create a specific focus for the session. What is their connection or emotional relationship to the issue?

Example Opening Questions

- *What's on your mind today?*
- *What would you like to explore today?*
- *We have 45 minutes today. How would you like to spend that time?*

Example 'Dig Deeper' questions

- *What is important to you about this?*
- *What is the value or benefit for you?*
- *What does this mean for you?*
- *Why this, now at this time?*

Eg. 'I want to lose weight' vs 'I want to lose weight so I'm healthier?' vs 'I want to lose weight so I can be more active with my family'

Explore Influences or Considerations

We all have life experiences that influence the future choices we make. Is there an underlying concern, or previous experience that might help or hinder your client in achieving their goal?

Questions you could ask?

- *Is there anything or anyone you think might get in the way of success?*
- *Have they tried anything previously that did or didn't work?*

Measurable Outcomes

The outcome can be tangible, such as an action plan or list of ideas. Or, it can be an acknowledged emotion such as your client expressing they now feel confident, have greater clarity, or feel empowered and ready to face the challenge with my full energy.

Questions you could ask:

- *What does success look like to you?*
- *How will you know you have been successful in this area?*

Step 2: Implementation

As the coach, it's your responsibility to check in with your client throughout the session to be sure it's progressing as they had hoped or anticipated. It's also your responsibility to notice if the session is straying from the session agreement. It might be that your client doesn't realise the session has one off track, in which case there's an opportunity to refocus and continue. Or, it might be that they want to switch topics, in which case there's an opportunity to reset the Coaching Agreement and then continue.

Observations you could share

- *I notice we wandered off your original goal. Would you like to switch topics or should we take a moment to refocus*

Step 3: Review

At the end of the session, it's important to check in with your client and assess the anticipated measurables.

Questions you could ask

- *How do you feel in relation to what you had hoped to achieve from our session today?*
- *How do you feel about the progress you made today?*
- *What actions do you plan to take after our session / or before our next session?*

Reflections

- In your next peer coaching session as a client, take note as your coach steps you through the session agreement. Use this to consider how it feels for the client, and what questions you would have like to have been asked to help you move forward.
- Create a coaching contract that communicates the platform and boundaries for your coaching services. Add this to your coach portfolio

Resources

Establishing the Coaching Agreement: The Misunderstood Competency
Is establishing a coaching agreement necessary at the start of every session?

https://coachfederation.org/app/uploads/2017/11/SampleCoachingAgreement.pdf
https://coachfederation.org/core-competencies

http://carlyanderson.com/wp-content/uploads/ICF-LA-Fran-Fisher-Handout.pdf