

PERFORMANCE INSIGHT, LLC

Dr. Scott A. Dreyer

(848) 267-1014

COACHING AGREEMENT, POLICIES & PROCEDURES

Dear Coaching Client,

Performance Insight (PI) consultants coach our clients by utilizing questionnaires, asking challenging questions, listening carefully to what you share, identifying your values, visions and goals, jointly developing homework, identifying your resources (experiences, strengths, and qualities), creating strategies to overcome blocks to success, working toward a high degree of self-care and empowering you to take courageous steps. A key aspect to the coaching relationship is on developing appropriate action steps to help you move toward your goals and dreams. Although there are no guarantees on the outcomes from performance coaching, most people report significant progress on their goals.

Ethics and Professional Standards:

Coaching is not therapy or counseling. Performance Insight consultants do not engage in the practice of psychotherapy with our coaching clients. If issues arise that are best dealt within a therapeutic context, we will refer you to an appropriately trained licensed therapist. In entering into the coaching relationship, and signing this agreement, you are agreeing that if any mental health difficulties arise during the course of the coaching relationship, you will notify Performance Insight and your coach immediately, so we may provide you with appropriate referrals.

The information you share with PI will remain confidential unless (1) you give specific permission to release the information, or (2) we are required to release information by law. Exceptions to confidentiality include information about intent to seriously harm an individual, child abuse, and elder abuse. Be aware that full privilege may not apply to certain coaching services; In other words, coaching records may be subpoenaed in court. Some means of communication, such as video conferencing, wireless telephones and e-mail may not be secure from eavesdropping. So, if you agree to their use, you are indicating your agreement to utilize a communication medium that may not be completely secure and confidential.

Each party agrees to indemnify, defend and hold harmless the other party and its agents, officers, and employees from and against any and all liability expense, including defense costs and legal fees incurred in connections with claims for damages of any nature whatsoever, including but not limited to, bodily injury, death, personal injury, financial, or business losses, or property damage arising from such party's performance or failure to perform its obligations hereunder.

Current (2023) fee schedule:

Sport/Performance/Life Coaching: w/ Doctoral-level Performance Psychologist - \$185.00 (50 mins)
w/ Masters-level Mental Performance Consultant - \$135.00 (50 mins)

Executive Coaching: w/ Doctoral-level Psychologist & ICF Accredited Coach - \$250.00 (50 mins)
w/ Masters-level Coach/Consultant - \$180.00 (50 mins)

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Cancellation Policy:

We will agree on a standard time for our in-person, video, or telephone conversations. Once that time is established, it will be reserved for you. **If you need to cancel an appointment, please provide at least 24- hour notice or you will be charged for the appointment (in full). Cancellations made with less than 24-hour notice will be charged 50% of the hourly rate. We hold ourselves accountable to the same conditions.** Of course, legitimate illness and crisis situations, out of one's control, will be waived.

As a coaching client I understand and agree that:

- 1) I am fully responsible for my well-being during my coaching calls/sessions, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time.
- 2) Coaching does not treat mental disorders as defined by the American Psychiatric or Psychological Associations. I understand that coaching is not a substitute for counseling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment and I will not use it in place of any form of therapy. If therapeutic services are needed professional references will be provided.
- 3) If I am currently in therapy or otherwise under the care of a mental health professional, I have consulted this person regarding the advisability of working with a performance coach and that this person is aware of my decision to proceed with the coaching relationship.
- 4) Coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education and recreation. I acknowledge that deciding how to handle these issues and implement my choices is exclusively my responsibility.
- 5) Certain topics may be anonymously shared with other coaching professionals for training or consultation purposes.
- 6) 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.

Coaching usually leads to improvements and positive changes in one's life. We will discuss the pros and cons of coaching together.

We believe that each of our clients is unique, creative, and responsible for moving their own life forward. We look forward to working with you.

Sincerely,

Performance Coach and Consultant

Date

I fully understand and agree to the contents of the above document

Coaching Client Signature

Date

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Client and Coach Responsibilities

Coaching is an ongoing, confidential, one-on-one partnership between a client and a coach to identify, prioritize, and achieve the client's desired goals. The purpose of the coaching engagement is to help maximize the client's potential and enhance his/her personal and professional effectiveness.

As the client, you are responsible for the following:

1. Identifying your primary focus area(s).
2. Committing to learn more about and take action on your focus area(s).
3. Determining when you need advice and skills (consulting) versus when you need thought provoking questions (coaching).
4. Initiating each coaching call/meeting.
6. Being candid and courageous with yourself and your coach.
7. Stretching and challenging yourself, and enjoying the process.
8. Holding yourself accountable.
9. Communicating what is working, what is not and what needs to shift

As the coach, I am responsible for the following:

1. Helping you maintain your primary focus.
2. Being fully present during each coaching call/meeting.
3. Being clear about when I am consulting versus coaching.
4. Provoking your learning and action by asking questions and making requests.
5. Providing mental/cognitive, emotional, and behavioral tools for you to be your best.
6. Sharing my intuition with you, even if it is off target.
7. Reflecting to you both your spoken and unspoken messages.
8. Holding myself accountable.
9. Following up with you to hold you accountable.

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Coaching Procedures

Welcome to coaching with Performance Insight. We look forward to working together. There are a few guidelines that we expect clients to maintain in order for our relationship to work. If you have questions regarding these policies, please discuss them with me.

Procedure: Clients call or come to the appointments on time. Please come to the appointment with updates, progress and current challenges. Let me know what you want to work on and be ready to be coached. Make copies of the enclosed client Session Preparation Form and bring or send me a completed form before each meeting. The agenda is client generated and coach supported.

Fee: Clients pay on time (within the course of the session contract) unless prior arrangements have been made. Payment can be made by cash, check, Zelle, Venmo, and/or credit card.

Contacts: Our agreement includes a set number of calls or appointments. If you or I are on vacation, we will spend more time before you/I leave and after you/I return.

Changes: My clients give me 24 hours' notice if they have to cancel or reschedule a call/appointment. If you have an emergency, we will work around it. Otherwise, a missed call/appointment is not made up and you are responsible for the fee.

Extras: You may call/text between sessions if you need "spot coaching", have a problem, or can't wait to share a win with me. I enjoy delivering this extra level of service. I do not bill for additional time of this type, but I ask that you keep the extra calls to 5-10 minutes maximum. 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 have you satisfied.

A Must: It is necessary for the client to implement the coaching that is given to experience the success of coaching. You have hired a coach to do things differently than you have done before. If you choose to not use coaching and keep doing what you have always done, you will get the results you have always gotten.

Sincerely,

Performance Coach and Consultant

Date

I fully understand and agree to the contents of the above document

Coaching Client Signature

Date

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CREDIT/DEBIT CARD AUTHORIZATION FORM

Performance Insight requires their clients to have an active credit/debit card on file. Most clients prefer this payment option, as it affords the ability to earn points/miles on their card, prevents the accumulation of high outstanding balances, simplifies payment, and reduces the likelihood of financial issues interfering with the coaching relationship. Please complete this form, or talk to Dr. Dreyer if you'd like to use another method of payment. Checks and cash are also accepted and welcomed, but need to be arranged prior.*

I authorize Performance Insight to charge the following to my credit/debit/HSA card:

- 1) The payment for each session/package.
- 2) The no-show and late cancellation fee stated in the contract.
- 3) Any remaining financial balance owed.

Card #

Expiration Date:

CVV # (3 Digits for Visa/MasterCard/Discover, 4 Digits – AMEX):

Zip Code of Credit Card Billing Address:

Signature

Date

Name (Print as Seen on Credit Card)

Date

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*If you want to pay with checks or cash, you still need to complete this form.

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CLIENT DATA FORM

Please take a reasonable amount of time (you define that!) to answer the following questions. There are no right or wrong answers. Some of the questions capture information where you are today. Other questions will make you curious about what you want from coaching, your sport, your career and from your life in general. Your answers will help us set a strong foundation for the coaching relationship. It is OK if you don't complete all the questions before the first session. You can complete them for the next one.

Date: _____

Name: _____

Occupation/Academic Level: _____

Business/Company Name or School: _____

Home Address: _____

Mobile Phone/Text: _____

Email Address: _____

Date of Birth _____ Age: _____

Preferred coaching schedule:

On (day of week) _____ or (time of day) _____

How often _____ x/month

Names of important people in your life (spouse/partner, children, parents friends, boss, coach, etc.): _____

Emergency contact and phone number: _____

How did you hear about Performance
Insight? _____

Have you ever been coached or received performance psychology services? _____

If so, please describe the experience... _____

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COACHING QUESTIONNAIRE

Please send back to me along with your signed coaching agreement

Please answer the questions below to help me to get to know you better. Don't worry about right, wrong, or incomplete answers; just tell me about who you are and who you want to be.

1. What is going on at *this particular time* that you are seeking performance coaching? How long has this been a challenge/obstacle/goal for you?
2. Were there any changes or significant events that coincided with the start of the issue/challenge?
3. What do you specifically want to work on? List up to 3 focus areas.
4. What will success look like for you? Ninety days from now, how will you know whether you have achieved your goal(s)?
5. What are your strengths? What are you best at?
6. What are one or two accomplishments that you are especially proud of?
7. What do you love about your sport or career? What's important about it to you?

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8. How would you describe your personality?

9. How must you change in order to achieve your short and long-term goal(s)?

10. What do I need to do as your coach to help you achieve your goal(s)?

11. What do you think could get in the way of me helping you change to achieve your goals?

12. Has your mood, sleep, eating, alcohol/drug use changed recently? Please explain.

13. Please list any medical conditions or injuries you are being treated for or have been treated for.

14. Do you work with a sport or strength coach, dietician, athletic trainer, therapist or other support professional(s)? Please share all.

15. In order to coach you more effectively, what else should we know about you?

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SESSION PREPARATION FORM

Date: _____

To get the most out of our coaching session it is best to spend several minutes preparing for it. Please bring or electronically send a copy before your session.

What I have accomplished since our last session: my wins or victories -

—
—
—

What I didn't get done, but want to be held accountable for:

—
—
—

Challenges I am facing right now:

—
—
—

What I am appreciative of or grateful/thankful for?

—
—
—

How do I want to use my coach today and what do I want to get out of this call/appointment?

—
—
—

What I commit to doing before the next session:

—
—
—

Energy Drainers I want to take care of – (Do It, Delegate It or Dump It)

—
—
—

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