

GLENN MCCLELLAN, PH.D

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LETTER OF ENGAGEMENT

Dear Friends,

Welcome to Top Performance Coaching! I'm glad I get the chance to work with you as your coach/consultant and I'm looking forward to supporting you in creating the successes and accomplishments you want for your company and in your career and life.

As we begin our coaching program, I want to review several procedures that will support and facilitate our coaching relationship. This letter will serve as a Letter of Engagement between you and me. Please sign and date it and make a copy for your files. You can email it back to me at your next convenience.

We've discussed some of these things already during our conversations, but I thought this recap would allow you to have all of the information readily available. If you have any questions about anything I've presented herein, please don't hesitate to ask me about it.

CONFIDENTIALITY: Our sessions are completely private and confidential. What you say goes no further than my ears. This is probably obvious, but I wanted to make sure that you know it. Often, clients want to say something private about themselves, and I want you to know that our sessions are held in strict confidence just between you and me.

Since I am a licensed therapist, the same laws and ethics of my profession bind me. This means in certain situations confidentiality is waived. The following are exceptions and limits of your confidentiality in which I am mandated to report:

- 1) Child, dependent adult and elder abuse.
- 2) If you are in danger of harming yourself or others, proper authorities will be notified.

FEES: The cost for our arranged time of meeting with you is billed monthly and due at the beginning of each month. A Fee schedule will be sent to you. Breakout meetings, conference strategy meetings, psychological business profile testing are billed separately on an as needed basis. If these services are needed or recommended, a separate fee schedule will be presented to you prior to the engagement of these services. Our contract is for a six month minimum time frame. Once we pass this allotted time, we will continue on for the remainder of the year, unless you would like to terminate our sessions. Fees are due at the beginning of each month and will be invoiced at the end of each month.

OUR SESSIONS: As we discussed, we'll meet once every week for approximately 40 minutes per session. I anticipate our first meeting or two will go longer than normal, but then we should be getting on to a more normal 45 minutes per session. These sessions are conducted in person, face time/ Skype, or by phone and usually in a confidential environment.

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TERMINATION: As with all new clients, I strongly encourage you to make a personal commitment to at least 6 months to a complete year of coaching. This is generally the time it takes to develop powerful plans and goals, and to begin producing significant results. In any event, you are free to terminate our working relationship at any time, as am I.

PROCEDURE: We can meet via FaceTime, phone, my office, or yours from time to time. Though, we haven't defined a set time, let's pick a time that works best for us both. This helps me manage my time most effectively as well as provide a strong discipline for our meetings. Most clients agree with this approach.

CHANGES: If you need to reschedule our meeting time, please try to give me at least 48 hours advance notice. If you have an emergency, we'll work around it. If you have to cancel a meeting, we will make it up in order to maintain four meetings during the billing cycle. My policy is I bill for missed sessions. A missed session is one that was scheduled but never cancelled or rescheduled—just missed. During that time, I have to be here and can't use that time for other clients. It's a time I've dedicated for a specific person and purpose. So if the appointment is missed, I'll still bill for it.

EXTRA TIME: Please feel free to call me between our regularly scheduled sessions for any reason. I do encourage you to E-mail me at: coach.glenn@att.net -This is a very convenient and economical way for us to communicate outside of our regularly scheduled sessions. I do get busy, but I will attempt to return your E-mails or phone calls promptly. If it is a matter that I feel my assistant Cecilia can handle, I will from time to time have her handle my scheduling and reach out to you.

PROBLEMS: If I ever say or do something that upsets you or doesn't feel right, please bring it up. I'll do whatever is necessary to make our working relationship successful. I trust you will tell me immediately if you feel that our coaching isn't going well for you or if you want to take a break.

HOMEWORK: I will often give you some type of homework to complete between our sessions. It is absolutely imperative that you make an honest effort to complete all such work by our next session. I'll ask for your commitment before we end the session, and that's the time to express any reservations you might have. In order for coaching to work, you must make it a very high priority in your life.

NOTES: Please take lots of notes during our sessions. Write down whatever hits you. I strongly suggest you invest in a journal in which you can take notes and store information that I will send to you from time to time.

GOALS: Most clients have goals, some of which you might have already discussed with me. Let's start there on our first session, but be flexible if you find something else you'd rather work on. Part of my job is to "shine the flashlight" ahead and around you, so please look with me. However, you are in charge, and my primary job is to respond to what you want to work on and accomplish.

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SESSION PREPARATION: Please take time before each session to think carefully about what you want to talk about during the session. The more prepared and focused you are, the more successful and productive our sessions will be.

REFERRALS: I don't do a lot of marketing to grow my practice. I rely, instead, on referrals from existing clients to bring me new clients. In fact, I consider this a confirmation that we're working well together and that I've made a difference. I encourage you to share our success with others, especially with those whom you feel could benefit from working with an executive coach. If you refer someone to me, I will not initiate the contact –have him or her call me. And if I can't help them, I'll do my best to refer them to another coach or other resource to get them the assistance they're looking for.

GET TO KNOW YOURSELF IN A NEW WAY: Working with a professional coach is a healthy way to grow. Most clients hire an executive coach to accomplish several specific goals, and much of the time and focus is spent on these goals. Yet don't be surprised if you discover new parts of yourself, or if you find your goals adjusting to whom you really are. This discovery process is natural, and you needn't rush it—just realize it will likely happen. Accelerated personal and professional growth is the hallmark of being coached.

DOUBLE YOUR LEVEL OF WILLINGNESS: As you are being coached, I will ask a lot of you. Not too much, I hope, but certainly more than you may have been asked recently. I need your willingness to experiment with fresh approaches and to be open to redesign the parts of your life that you are able to right now. This is so you can more easily reach your goals and live an integrated and fulfilled personal and professional life, using the gifts you have, and enjoying life as it is meant to be enjoyed. Please be willing to:

Change your behavior.	Re-examine your assumptions
Experiment and try new things	Tell the absolute truth, regardless
Remove sources of stress in your life	Remove all triggers of adrenaline
Redesign how you spend your time	Get support to handle problems
Set much, much bigger goals	Raise your personal standards
Treat people much; much better	Stop tolerating things in your life

I EXPECT YOUR BEST: You've hired me and I hope you're ready to do and be your best. And if you aren't doing your best, I'll ask you to. If you can't do that at the moment, I'll understand, and do what you need to be heard, understood, and helped back on track.

I GIVE STRAIGHT ADVICE: If I'm sure of the situation, and you're open to it, I'll make specific suggestions on how to handle a problem or "go for" an opportunity. If I'm not sure, I'll say so. Regardless, use the best of what I say and your own good judgment.

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I'M HERE: If you have a personal problem, are upset with something (even if it's with me or the coaching), or are just starting to realize something big, or can't wait to share a breakthrough, call me.

BETWEEN NOW AND OUR FIRST SESSION: Before our next session, please consider how you would answer the following questions. Your answers will form the basis of our next discussion.

1. What are 1-3 most important things you'd like to accomplish, as we work together within the next 60 days? Please be very specific.
2. What, if anything, is likely to get in the way or prevent you from accomplishing any of these things?
3. What's the most important thing you need from me as we work on these objectives?
4. How will you know your investment in coaching has been worthwhile?

I consider it an honor to work with you, and I anticipate great things as we partner together and move toward your forthcoming success.

Sincerely and All the Best,

Glenn McClellan, Ph.D

CLIENT SIGNATURE _____ DATE _____