

CHEAT SHEET



Glenn Livingston, Ph.D.

Glenn's companies have sold consulting and/or coaching services to dozens of Fortune 500 clients. He's worked with coaching clients all over the world, and directly supervised many coaches and psychotherapists.

Dr. Livingston's companies' previous work and theories have also appeared in dozens of major media like The New York Times, Crain's NY Business, and many more

Three Essential Policies to Put in Place BEFORE You See Your First Client

A Key Point Summary from an Interview with Dr. Glenn Livingston and Dr. Janice Seward.

A QUICK NOTE BEFORE WE BEGIN:

In Just 12 Weeks You Can Become a Professional Coach, Confident in Your Abilities AND Your Client Attraction Skills

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Janice Seward, Psy. D.

Dr. Seward is clinical psychologist, and currently Clinical Professor of Psychology and Medicine at the College of Naturopathic Medicine at the University of Bridgeport, Connecticut. *Jan* has also served on the faculty and executive team of the New York College for Allied Health on Long Island, NY). Jan's the former co-producer and co-host of the award-winning "Radio2Women" on WBCR 97.7 FM in Great Barrington, MA, where she and her co-host (*Serene Mastrianni*) interviewed hundreds of guests on topics about health care, politics, education, and the arts.

KEY POINT SUMMARY:

THREE ESSENTIAL POLICIES TO PUT IN PLACE BEFORE YOU MEET WITH YOUR FIRST CLIENT

In a recent interview with Dr. Janice Seward, a long-time “coaches coach” and New York therapist, we touched on the important topic of creating a safe environment that instills trust with your clients. There’s no room for miscommunication if you have policies in place to give to your clients before their first visit.

1. **Determine your time frame for appointments.** Some coaches provide an hour of time, while others see clients for 45 or 50 minutes. Whatever schedule works for you, *communicate it to your client and stick to it.* Be sure that you have time to go over notes between clients or stretch your legs before your next session.
2. **Create a policy regarding clients who show up late or not at all for their appointments.** It is important in any relationship for each person’s time to be valued by the other. Be sure to have a policy in place and communicated to your clients what will happen if they miss an appointment. You can always waive a no-

show fee if something happens to a client who always shows up, but you'll also have a tool to encourage clients who routinely miss appointments to learn to value your time.

- 3. Choose when and how your clients will contact you.** It's important to work out when, and if, you will communicate with clients between appointments. They need a way to reach you, whether it's text, talk or email. Be sure to communicate to your clients how and when to communicate with you as well as when you will get in touch with them. If you have a full schedule of clients, you may not be able to return a phone call until late in the day. You also need some time frames so that you aren't getting cell phone calls from clients in the middle of the night.

Put your policies in writing and have the client sign them as part of a contractual agreement with you. Having your client sign a contract helps to make sure they have read your policies and adds another layer of value to your services.

Clients who receive clear communication about your expectations are less likely to get their feelings hurt or get angry over a miscommunication. As a good coach, you are always modeling effective communication and self-respect for your clients. They learn by the way you execute professional business practices how to generate their own self-respect and to effectively communicate their expectations with others.

Of course, you can bend your policies once you've established a relationship built on trust. A long-term client may need an extra 15 minutes if she is going through a hard time. You may choose to give a client who has displayed good boundaries your cell phone number to call you after hours after he goes for a job interview. However, in the beginning, it is important to have guidelines that provide a safe and open environment for both you and your clients.



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