

# Coaching Proposal

SAMPLE 1

## PROPOSAL FOR xxxxxxxxx MEDICAL MANAGEMENT GROUP SEPTEMBER 23, 1999

### STAGE 1: (estimate four months)

#### Objectives:

- ▶ To discover how the identified teams are currently functioning,
  - ▶ To create team vision for top performance within each identified team,
  - ▶ To determine and implement specific objectives identified by the team,
  - ▶ To facilitate maximum communication between team members,
  - ▶ To teach conflict resolution skills and resolve current conflicts.
- A. Discovery Phase—Individual interviews with each team member as well as the
  - B. Physicians involved to determine what they see as the strengths and weaknesses of their team's current functioning; (first month)
  - C. Weekly Team Development group meetings for each team including: (3 months)
    1. Feedback to team about common themes in the individual interviews with team members and with that team's physician;
    2. Assessment of team members' individual communication style;
    3. Creation of team's vision of what would constitute a top performing team, including a "report card" of their current performance and identification of necessary actions to raise their standards;
    4. Implementation of team goals (including conflict resolution) with Coaches' facilitation.

### STAGE 2: (estimate four to six months)

#### Objectives:

- ▶ To align the overall vision and goals of all teams in the (organization)
  - ▶ To establish criteria for maximum team performance,
  - ▶ To implement systems and processes , including methods of accountability,
  - ▶ To improve overall communication with the team,
- A. Assessment Phase-- Interview all physicians (group), 2-hour meeting.
  - B. Meet with all teams together in two 2-hour meetings per month for the purpose of aligning purpose (overall) of (organization), developing criteria for optimum team performance, establishing goals and accountability systems, improving communication and resolving conflicts.

#### INVESTMENT:

**Stage 1:** \$2400 per month for 4 months (approximately 8-10 hours monthly); this represents a 20% discount of our usual hourly rate. The initial \$2400 is due when we begin and will be invoiced monthly from that point. (Note: If we do not need 4 months to finish this process, we will move immediately into Stage 2).

**Stage 2:** \$1400 per month for 4-6 months (approximately 4-6 hours monthly), invoiced monthly as for Stage 1 (continued discount).

**CONFIDENTIALITY:**

When a Coach is brought into a company to coach an employee (Team), confidentiality for the Coachee (Team) is essential. This means that everything the Coachee (Team) says is totally confidential and not shared with anyone else in the company (unless the Coachee or Team chooses to share it). If desired, the Coachee or Team representative(s) is asked to report monthly to the appropriate person about how coaching is proceeding, benefits, concerns, etc. If requested, the Coach will meet jointly with the Coachee (Team representative(s)) and the person being reported to. The Coach will not divulge information the Coachee (Team) wants to be kept confidential to the person hiring the Coach.

The Coach recognizes that the Client (company or individuals) may have the following: future plans, business dealings and other proprietary information. The Coach will not at any time, either directly or indirectly, use any such information for the Coach's own benefit. The Coach will not give out the name of any Client without that Client's consent (as a reference) and the coaching relationship is confidential unless the Client chooses to tell someone about it.

This confidentiality statement shall be as confidential as the applicable state or federal laws-- and the client's own company policy (if applicable)-- allows. The Coaching relationship is not privileged and, as such, a Coach's records on a client can be subpoenaed.

**NATURE OF RELATIONSHIP:**

A client enters into Coaching with the understanding that he or she is responsible for creating his or her own decisions and results. Client also agrees not to hold the Coach liable for any actions or results for adverse situations created as a direct result of a specific referral given by the coach.

The Coaching relationship is in no way to be construed as psychological counseling or any type of psychotherapy.

**TERMINATION:**

Client (company or individual(s) being coached) may cancel at any time. Cancellation must be in writing, fax or e-mail. Payment made for current month shall be considered full payment for coaching agreement unless there is an unpaid balance. In the event of fee's owed at the time of cancellation, full payment is due and payable.

**CLIENT HAS READ AND AGREES TO THE ABOVE:**

**Client Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Client Company Representative Signature:** \_\_\_\_\_

**Coach Signature:** \_\_\_\_\_