



DATE

Re: Welcome to THE CLIENT ATTRACTION SYSTEM™!

Dear **CLIENT**,

It was great to talk about your business situation. Your goals are very clear, doable and I'm delighted that we'll be working together toward reaching them!

In the meantime, please prepare a few things to make our time on the calls more effective. It will help you get great results, immediately.

Please fill out the following materials by typing your answers in the actual document and return them to me at least a day prior to our first call. Feel free to take your time with it. (Keep copies for yourself.)

- Coaching Agreement
- Client Information
- Credit Card Processing Information Sheet

The attached **Weekly Progress Form** is not necessary for the first call, however, please fill it out weekly for subsequent calls and send prior to each coaching session. Sadly, clients who don't fill out the form weekly tend to get off track and see fewer results. I'm letting you know this because I want the best for you!

Clients who fill out the **Post Call Recap Form** (attached at end of this document) after each weekly call also see better results from our work. I ask that you fill it out also, including after the first call.

Should you have any questions or need clarifications, just call me. I'm looking forward to working with you, **CLIENT!**

Warmly,

A handwritten signature in black ink that reads "Fabienne".

Fabienne Fredrickson
Tel: 203-555-1212
Fabienne@ClientAttraction.com



COACHING AGREEMENT

Please "sign" and date this form, then either email it to me BEFORE our first call. We will not start our coaching until I receive it, hence the email preference, which is faster. Keep a copy for yourself.

Today's date:

Your Name:

Whom may I thank for your referral?:

Services: 6-month Client Attraction Coaching Program

Terms: 3 calls per month (30 minutes each). Total of 18 sessions.

Rate: \$xxxxx total. If you choose to pay monthly, the rate is \$xxxx a month (this includes a 2% service fee per month). You can always add extra sessions, if need be.

Ground Rules:

1. **Client calls coach at the scheduled time.**
2. Coach has permission to be direct, though unconditionally constructive.

Pledge: Client and Coach agree to abide by the Coaching Policies and Procedures as listed on the accompanying sheet.

Coach Disclaimer of Liability: Client hereby employs Fabienne Fredrickson as Coach for the purpose of advising and counseling Client with respect to Client's business and skills, professional development, and setting and achieving Client's goals. Fabienne Fredrickson has experience in such matters and agrees to render such coaching services. Client understands and Fabienne Fredrickson agrees that she is not an employment agent, a business manager, a financial analyst or a psychotherapist, and that she has not promised, shall not be obligated to, and will not: (1) procure or attempt to procure any employment, business or sales for the Client; (2) perform any business management functions such as accounting services, tax or investment consulting, or advise with regard thereto; or (3) act as a therapist, providing psychological counseling, psychoanalysis or behavioral therapy.

Above agreed to by _____ (Client's Signature)

on _____ (Date)



COACHING POLICIES & PROCEDURES

I want you to be familiar with policies/procedures so that things can run smoothly between us. **Please read these very carefully so that there are no misunderstandings later on.**

Should you have any questions about logistics, including scheduling, **please email my client relationship manager Carolyn directly at Carolyn@ClientAttraction.com or by calling her on xx.** She'll be happy to help.

FEE You have selected the 6-month Maverick Program. The fee for this program is \$xxxxxxx if paid upfront and in full, or 6 monthly installments of \$xxxxxxx (this includes a 2% service charge for installment programs) for 3 weekly 30-minute coaching sessions. With this option, we will keep you on track and moving extraordinarily quickly towards your goal. **In an event that there are 4 or 5 weeks in a month, we speak the first 3 weeks of each month.** (Please know that you can always add a session at any time during the month, if need be.)

PAYMENT You may choose to pay by American Express, Visa or MasterCard. If you have chosen to pay upfront, you may put your coaching fee on one single credit card, or more than one. If you have chosen the monthly payment option, **your payment will be processed at the end of the month preceding each month of coaching without you having to do anything** (example: payment for September coaching will be processed late August.) Remember, during tax season, your coaching fees may be considered a **tax deductible business expense**. The Credit Card Processing Information sheet is attached.

LENGTH OF WORK TOGETHER The coaching program you are signing up for is a 6-month program, although you may want to plan working on the Client Attraction System™ for 12 months. It's simply going to take that amount of time to implement all of the strategies, assignments and systems to get you a full practice, and a consistent stream of new clients. Conventionally, a practice gets full in 3 to 4 years, sometimes much longer. Expect a fraction of that as a result of our work. However, it doesn't mean that it will take a year for you to get new clients – quite to the contrary. Virtually all of my clients enjoy a substantial (sometimes *dramatic*) increase in clients *and* income within a few short months. Just know that it will take you about 12 months to put all of the strategies in place, so it's good to plan for it.

MY CLIENTS ARE MY PRIORITY From now on (now that you're a client), please send all emails to me at the client specific email address **coach@clientattraction.com INSTEAD OF fabienne@clientattraction.com,** which is the general email address. Clients such as yourself get top priority and I use this system to make sure your emails get to me sooner than anyone else's.

PROCEDURE Complete the Weekly Progress Form and e-mail to me the day before our scheduled time each week. At the time of our session, **call me at 203-555-1212.** Please call from a quiet place to concentrate on our work together. (Please do not eat or do anything else when you're being coached. You won't get as much value.) Please be on time.



CALL WAITING If you have Call Waiting, please disable it before your call, usually by dialing *70 before you dial the number you are calling. It disables itself when you hang up.

CALLS **If you are on vacation, we will extend time on calls before you leave or after you return to include the full amount of time per month (i.e., two 45-minute calls instead of three 30-minute calls.)** We schedule all of that month's coaching sessions during the first 3 weeks of the month (the weeks we are coaching), since I'm often on vacation or working exclusively on my business the last week of the month. In the event that a particular month has 5 weeks, we still work together the first 3 weeks of the month, and resume our regular calls the first week of the following month. For bookkeeping purposes, we schedule all of that month's time during the actual month to keep us on track and on schedule, and resume our work the first week of the next month. All calls are stated in Eastern Time.

CLIENT DAYS AND HOURS Client calls are scheduled Tuesday through Thursday 9:15am to 4:45pm. Mondays and Fridays are my time to work on my business, as is the last week of every month (These times are also good for you to catch up on your uncompleted assignments). If you send me something via email on Thursday night or Friday, I'll most likely respond Monday or Tuesday.

COACHING WEEKS AND OFF WEEKS As discussed, **we will work together the first 3 weeks of the month.** Sometimes, that can be confusing in different people's perceptions. To make our calendars clearer, we have put the coaching calendar for the year on the website, so that you always know what's going on in terms of scheduling. You'll be able to see what weeks we work together, and what weeks you're off to complete assignments on your own or just take a break. Here it is: <http://www.clientattraction.com/calendar.htm>. This page is only for my clients, so you won't be able to find a link on my website. Please save this link in your favorites for future reference. We will update the page and send a notice of changes whenever they occur, so that you have a heads up way ahead of time.

SCHEDULE CHANGES I want the very best experience for you. **Please try not to reschedule your appointment.** If an extremely unusual situation occurs and you need to reschedule, please give me lots of advance notice. As with any professional service business, **the call will not be rescheduled if missed without a 24-hour notice.** If you call later than the scheduled time, the call will still end at the originally designated finish time, as I have clients scheduled before and after your call. If it's a true emergency, we will work around it. **For all schedule changes, please email my client relationship manager Carolyn directly at Carolyn@clientattraction.com or call her on xxxxxxxxxx.**

KEEPING TRACK OF APPOINTMENTS Please know that our agreement includes 18 coaching calls of 30 minutes each, or a combination thereof. You are responsible for keeping track of your own number of calls (including missed calls as mentioned above) on your Weekly Progress Forms and in your records. I too am keeping track, but it is your ultimate responsibility.

EMAILING IN BETWEEN APPOINTMENTS I understand that you might you have questions in between our appointments. Please know that if it is a *quick* question



that requires a simple response, I would be delighted to help you. If it requires more time or a more complicated answer, I will usually say "let's save it until our next appointment" so I can better help you and not short-change you. Thanks for understanding.

CONFIDENTIALITY I recognize that you may have the following: future plans, business affairs, customer lists, financial information, job information, goals, personal information and other proprietary information. I will not, at any time, either directly or indirectly, use any information for my own benefit, disclose, or communicate, in any manner, any information to any third party. I will also not divulge that we are in a coaching relationship, with anyone, as a courtesy for your privacy, unless you give me permission to. You may, however, feel free to tell others that we are working together if you like.

DECISIONS: You are responsible for decisions made about your work and your business. I am happy to share my opinions, offer resources, or make referrals. However, it is up to you to decide which, if any, to act upon. If you decide to take a recommendation, it is your choice and you take full responsibility for it. If you decide to work with someone based on my referral, you must know the workings of that relationship will be entirely separate of my relationship with you.

NONDISCLOSURE OF COACHING MATERIALS Material that I give you in the course of our work together is proprietary, copyrighted and developed specifically for The Client Attraction System™. You agree that such proprietary material is solely for your own personal use for the purpose of starting, growing or marketing your business or service. Any disclosure to a third party is strictly prohibited.

YOUR COMMENTS At the end of our coaching, I will ask you to write a few comments of our work together, as an evaluation. It helps me to see what you liked about the process, what results you received overall and anything else you'd like to add. I find this extremely valuable and now make it a consistent part of working with each client. I thank you in advance for this. Often, I ask clients if I can use these comments in the form of a client testimonial to share with others who are thinking of taking the next step in attracting clients. You'll let me know if that's acceptable.

REFERRAL PARTNERS Many times in my coaching practice, I've had the opportunity to send a client referrals and I'm absolutely *thrilled* to do it. This happens often most probably because I get to know a client's business intimately and become keenly aware of who their ideal clients are, as well as the results that people get from the services they provide. This means that, occasionally, you may receive a referral from me, depending on the circumstances. On the flip side, my clients regularly send referrals to my practice too. In essence, we become referral partners. So, that said, here's what I propose: if you overhear someone saying they'd like to attract more clients and make more money, I invite you to direct them to the website (www.ClientAttraction.com) to read the free articles and compelling client testimonials. You can also ask them to contact me for a quick chat, free of charge, to see if I can help their situation. I will do the same for you when I meet someone who would benefit from working with you.



Above agreed to by _____ (Client's Signature)

on _____ (Date)



CLIENT INFORMATION

Today's date:

Name:

Address:

City, state, zip:

Phone numbers (home):
(mobile):
(office):
(fax):

Email address:

What is your birthday? (Month/day/year):

Please take the time to answer the following and email your responses to me before our first call. Give yourself the quiet space and time to answer each question fully. This will be the basis for amazing progress and results in our work, so let's make it count.

About your business

"There is no performance without accountability, and no accountability without measurement." – Michael Gerber, *The Emyth Revisited*

1. What is the nature of your business; what do you do for a living? (one sentence is sufficient)
2. What is your website address, if you have one?
3. **The first 90 days:** List 3 short-term goals you would like to work on with measurable results for each. Keep these realistic but a bit of a stretch for you.
 - 1.
 - 2.
 - 3.
4. **The next 90 days:** List 3 more goals you would like to work on by 6 months with measurable results for each. Keep these realistic but a bit of a stretch.
 - 1.



- 2.
- 3.
5. If you were to wave a *realistic* "magic wand", where would you like to be 12 months from now?
6. And in 2 years?
7. Please tell me the story of your business with emphasis on turning points, challenges, struggles and proud moments (1-2 paragraphs is sufficient.)
8. What have you done so far to attract clients, including what worked and what didn't?
9. What is holding you back or slowing your progress (no knowledge of marketing, time, competition, resources, your positioning in the marketplace, cash flow, confidence in self or project)?
10. What is the critical need or biggest concern you need addressed *right now*?
11. What is the biggest opportunity/resource that you're not taking advantage of?
12. Please list below all the things that you want to improve, achieve, master or change about your business over the next year. (I've added 20 lines below, but I invite you to add as many as 100 if you can think of that many.) Together, we'll



work on most of them, either right away, or during the course of our work together. The more we work on, the more successful you'll be.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
20. (Feel free to add more lines if you need to. The more, the better.)

13. What would your version of a "million dollar business" look like? What would you need to do (or be) to make your business a million-dollar-a-year business?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.

14. What are the negative things you typically tell yourself about having a full practice and lots of clients coming in? (Make a list, please.)



15. What is the most amount of money you see yourself making as a self-employed person? Why?
16. What are your biggest 'gremlins,' those things you feel/say about yourself that are negative, self-imposed influences that affect or may sabotage your Client Attraction?
17. What spiritual/manifesting tools do you currently use in your practice-building, if any?
18. If you currently use the principles of the Law of Attraction, where exactly do you find yourself getting 'stopped' for manifesting what you want in your business?

Regarding the Coaching:

1. What will I enjoy most about working with you?
2. What do you want me to watch out for in our coaching?
3. Do you have uncertainties about working with a coach? (If so, please explain.)
4. Are you willing to do the agreed-upon work and send the weekly progress forms?
5. Are you ready to make the changes necessary to achieve your goals?
6. A note about me as a coach: I have a tendency to see immediately when a client is using excuses, is complaining, resisting or over-thinking an assignment. This usually means that the client doesn't want to move forward on a certain aspect of our work for whatever reason, and in most cases, that the client will eventually not see the results they signed up to get from our coaching. I usually don't enjoy working in this type of situation (I work best with "can do" people, rather than those who drag their feet or resist everything.) Bottom line is, I simply want the best results for you out of our work. **Do I have permission to gently call you on this if I see it happening?**
7. What do you want me to do (or not do) if you get behind on your assignments or resist doing some of the work? (By the way, I'm always gentle... so don't worry!)
8. What is the most empowering and helpful thing I can do for you during sessions?



9. Lastly, one of the things I really believe in is in rewarding my clients for sending referrals and because of that, my business is mostly referral-based. Would you please let me know what 5 or 6 things you would want to receive from me as a thank you for a referral? (Bottle of wine, a specific book, magazine subscription, movie tickets, etc.)

Thank you for taking the time to fill this out! I look forward to an ongoing, enriching and successful relationship with you.



Credit Card Processing Information

"Fabienne Luzena Coaching Services" is hereby authorized to charge the following credit card in the amount shown below.

Please fill this out even if you've given me your credit card number over the phone.

Credit Card Information	
Your Name	
Address	
City, State, Zip	
Phone Number	
Name as appears on Credit Card	
Type of Credit Card (MC, VISA)	
Credit Card Number (please type in this with no spaces)	
Expiration Date	
Amount Per Month	
Authorized "Signature"	

If paying monthly, your payment will be processed at the end of the month preceding each month of coaching without you having to do anything (example: payment for September coaching will be processed in late August.)



Please email this to me the day before each and every coaching call. You can save this in your files and fill in the answers throughout the week or the day before our call to help you track your progress, and improve the efficiency of our time together. It will serve as a valuable road map for our work that day. The more you tell me what you want to work on with this form, the more I will be able to help you. One great way to remember to fill it out is to plug in a reminder alarm in Microsoft Outlook to ring the day before our scheduled call.

WEEKLY PROGRESS FORM

Name:

Session date:

Coaching Session #:

What I have accomplished based on the assignments since our last call (when this includes new clients or prospects, please also indicate it here):

q
q
q
q
q
q
q
q

What didn't I get done, but intended to:

q
q
q

The challenges and problems I am facing now:

q
q
q

Opportunity knocks once. These opportunities are available to me right now:

q
q
q
q

What I want to focus on primarily on today's call. Here's how you can best be of serve me during our time together:

q
q
q
q

My assignments for next week (fill this out with me during the call):

q
q
q
q
q



Please email this form to me after each call. You can save this in your files and fill in the answers right after we hang up to help you stay accountable, get clear on what we discussed, and improve the efficiency of our time together. (Clients who use this form and send it to me right after our calls consistently get better results from our work than those who don't.) The idea is that we share more information than what we would by just talking and that you are clear on your assignments.

POST CALL RECAP FORM

Name:

Session date:

Coaching Session #:

My greatest insight from our call was:

q
q
q

How I evolved during our call:

q
q
q

Commitments I'm making to myself (my assignments for the week):

q
q
q
q
q
q
q

Questions or ideas I'm still thinking about that we didn't discuss:

q
q
q

As my coach, you committed to:

q
q
q

The thing you said or asked during our call that impacted me most or worked best for me was:

q
q