



Standard 2 – Case Study

Title: Creating a Coaching Agreement

Background

ICF defines the “Coaching Relationship” as a relationship that is established by the ICF Professional and the Client(s)/Sponsor(s) under an agreement/contract that defines the responsibilities and expectations of each party. And a written agreement/contract is encouraged if culturally appropriate. A coaching agreement/contract should clearly establish the rights, roles, and responsibilities for all involved. What does it look like when a client/sponsor keeps forgetting to sign the agreement/contract? Should the client be punished if the sponsor is forgetful?

Case study

Mike recently hit the one (1) year mark of his coaching career. A couple of close friends decided to take him out for a celebratory dinner. The table talked the entire night about his accomplishments and all the sweat and tears it had taken to get Mike to this position. He had finally found his niche.

One of his friends, Stacy, casually mentioned that she had a colleague who had mentioned that their son could use a coach. The son had recently graduated from a local university and was living in the basement of his parent’s house and worst of all, had no direction. Mike suggested that Stacy connect her colleague to him through email.

The following day he received an email from Stacy introducing him to her colleague, Ben. Ben immediately responded and asked for a zoom call to talk through the process. Mike happily agreed and a few days later was introduced to Ben through zoom. At the end of the call, they set up a time for the three of them to meet – Mike, Ben and his son, Zach.

Once Mike met Zach, they quickly connected through similar likes and dislikes and found that they had a lot in common. Because Ben, the father of Zach, would be the one paying for the coaching sessions, it was decided that he would sign the coaching agreement. Mike agreed to send that over to Ben once he got home. And Zach and Mike looked at their calendars and set up times to meet over the next few weeks as they were both eager to get started with their coaching relationship.

A few weeks later, Mike found himself in a dilemma. Zach was making excellent progress and had even found his first job as a Research Coordinator for a great company. Unfortunately, Ben had gone silent. He had paid Mike up front, but he hadn’t signed the coaching agreement. Mike really did not want to stop the progress that Zach was in the middle of but was also concerned that he might be in ethical violation without a signed agreement.

Should he ask Zach to get involved and push his dad to sign? Or would getting Stacy involved be helpful since he saw her every day at work anyways? He was starting to feel uneasy about the verbal agreement alone and felt stuck.

Implications for Coaching

- Explain and list all terms of the coaching agreement—the coach should have the coaching agreement on file and ready for the first initial introduction. The coaching agreement should be discussed verbally to make sure both the client and sponsor understand all terms. **ICF Code of Ethics (2020) Section 1, Standard 1 (Coachingfederation.org)**
- Create an agreement and have it signed prior to the commencement of services—the coach should wait for the agreement to be signed and returned before starting a coaching session. **ICF Code of Ethics (2020) Section 1, Standard 2 (Coachingfederation.org)**
- Maintain the strictest levels of confidentiality—the coach should outline this sensitive topic within a signed coaching agreement. A signed coaching agreement is a necessary protection for both the coach and the client. **ICF Code of Ethics (2020) Section 1, Standard 3 (Coachingfederation.org)**

Possible outcomes or next steps

- **Seek outside support.** A coach in any ethical conundrum may choose to turn to their coach, mentor coach, coach supervisor, training program, or coaching organization for support in navigating ethically confusing situations.
- **Be up front with the client.** A coach may choose to bring their concerns to the client directly. This allows both parties to discuss and determine the best path forward in a collaborative manner.

Discussion Points

- What boundaries can a coach put into place to avoid this kind of situation?
- If you were this coach's coach, mentor, or supervisor, how would you support the coach?
- If you were in this situation, how would you move forward without prohibiting Zach's progress?

Reference

ICF Code of Ethics (2020), <https://coachingfederation.org/ethics/code-of-ethics>