

This checklist is for professional coaches which can help identify irritations or disturbances in the coaching process at an early stage so that the coach-client-relationship can be cleared or re-contracted, and failure avoided.

Checklist to Clarify a Coaching Mandate (Contracting)

1. Clarifying the issue

Goal: to figure out a coaching issue; if it's suitable for coaching and if my competencies as a coach are suitable for it and the client

- Is there a realistic issue? Is the issue concrete and measurable?
- Can I see the client's motivation for change?
- Does the client have sufficient resources for change?
- Do I have the competency for the client's issue?
- Is the issue appropriate for coaching, or is it more appropriate for therapy? Is it a kind of "management from the background"? Or a substitute for a lack of leadership?
- What is the issue behind the issue? E.g. do I prepare the client for the exam or do we talk about his general fear of failure?

2. Clarifying the relationship

Goal: to clarify the coach and the client's expectations of the coaching process as well as the responsibilities within the process

- What are the client's previous experiences with coaching? What does he/she know about coaching?
- What are the client's expectations of coaching? Do his/her expectations fit the coach's idea of coaching?
- What about trust, confidence, and loyalty?
- What does the client know about the coach's relationship to the client's organization?
- What does the initial roadmap of the coaching process look like?
- What are the rules – which responsibilities have to be clarified?
- What are limitations or taboos in the coaching process?

3. Clarifying the context

Goal: to clarify which context the coaching mandate came into being, to decide if coaching is appropriate or not, and which traps are there for everyone involved

- How did the client find their way to the coach? Whose idea was coaching?
- Are they here voluntarily or is it obligatory? Were they sent to coaching?
- What kind of image does coaching have in their organization?
- Who knows that they are coached and who doesn't?
- What happens if the coaching goals change within the process?
- What will their boss gain from sending them to coaching?

Also talk about general conditions: fee, location, time, duration, frequency, and cancellation.