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 measureable?
   - 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.

© Dr. Thomas Bachmann, 2018