

Rosen Coaching

Thrive in a TRUE Wellness Model!

Name:	
Clinic Name:	
Address:	
Phone:	
Fax:	
Home/Cell:	
Email:	

Coaching Agreement

Before we can begin, we need to clearly understand what the coaching relationship is and what it isn't. Please read and agree to this agreement which defines the coaching relationship.

My Expectation Is:

- That you shall have more of what you truly want in your practice and in your life.
- That you will be able to see more people in less time, give a better quality service while getting better results and have a whole lot more fun doing it, if you choose to

My Commitment Is:

- I will listen very closely to what you do say and what you do not say
- I will ask questions until I am certain that you and I understand you
- I will absolutely be truthful with you at all times
- I believe that you can accomplish more than you believe that you can
- I will have high expectations, and will ask you to stretch for them
- I will support you and your decisions, absolutely
- I will challenge you to reach for and even more fulfilling life and practice
- I will never ask you to do anything incongruent with your beliefs but I will ask you to stretch and possibly do things that may feel uncomfortable
- I will continually ask you to redefine who you are, what you want, and why you want it
- I will ask you to make sure you are congruent with everything you think, say and do in your practice and in your personal life
- You will receive more than is promised

Your Commitment:

- To do what we agree you will do or let me know that you did not do it

Why We Will Be Successful:

- Because the synergy of having two brains working for you always increases your effectiveness
- I will challenge and support you to be your best and to have the practice of your dreams, not someone else's dreams

Initial Consultation:

Note: This one time "initial consultation" fee of \$300 will be assessed at the onset of the coaching program and will include:

- DISC and PIA&V Behavioral Analysis assessments
- One hour one-on-one debriefing of above assessments with Behavioral Analysis Specialist
- One 60 minute Special Consultation with Dr. Rosen or Dr. Meyer which will include
 - a. Initial plan of action/goal setting
 - b. Practice Analysis
- review of all staff "team questionnaires"

Coaching Session Day, Times and Changes:

- There will be three thirty-minute coaching sessions/month
- The day and time of sessions will be agreed upon and scheduled for a specific day and time- to be repeated monthly
- Any changes or requests regarding appointment times must be made via telephone and confirmed either by fax or e-mail at least 24 hours in advance
- Missed sessions with at least 24 hour notice may be made up during the month. Missed sessions without 24 hour notice will not be made up. There will be no refunds for missed appointments.

Fees and Payments:

Rosen Coaching agrees to honor these prices and not to increase them during the chosen program period. At the end of the program period Client may continue working with Rosen Coaching at whatever the Rosen Coaching fees are at that time. Fees are based on the value of \$847/month for coaching services.

Month to Month Program

- Three thirty-minute coaching sessions/month. Client will pay \$847 per month for each month
- The fees will be charged automatically to Client's credit card or automatic bank draft the first day of each month
- Unlimited email support!
- Any extra time needed by Client may be purchased at a prorated rate of \$283/half hour and will be charged at the time of service
- Rosen Coaching will give Client at least 30 day notice of any price increase

6 Month Program

- Three thirty-minute coaching sessions/month. Client will pay \$747 per month for each of the 6 consecutive months (must be 6 consecutive months)
- The fees will be charged automatically to Client's credit card or automatic bank draft the first day of each month
- Unlimited email support!
- Any extra time needed by Client may be purchased at a prorated rate of \$249/half hour and will be charged at the time of service

12 Month Program

- Three thirty-minute coaching sessions/month. Client will pay \$697 per month for each of the 12 consecutive months (must be 12 consecutive months)
- The fees will be charged automatically to Client's credit card or automatic bank draft the first day of each month
- Unlimited email support!
- Any extra time needed by Client may be purchased at a prorated rate of \$233/half hour and will be charged at the time of service

Commitment and Termination Policy:

Month to Month Program

- Client may cancel this contract by giving a one month notice to Rosen Coaching by Phone or email.
- All monies owed to Rosen Coaching Must be paid in full before the end of the last day of coaching

6 Month Program

- Client may cancel this contract by giving a one month notice to Rosen Coaching by Phone or email.
- Client will pay Rosen Coaching 50% of the "Discounted price" or an additional \$50/month for months used including the last month. (Example: if two months were used then a 30 day notice was given, Client coached for 3 months; Client would pay Rosen Coaching 3 X \$50= \$150 to cancel the contract) There are no fees whatsoever for the rest of the unused months.
- All monies owed to Rosen Coaching Must be paid in full before the end of the last day of coaching
- If Client plans on discontinuing coaching services at the end of the 6 month period Rosen Coaching requires a one month notice at the end of month 5.
- Upon completion of this 6 month program client may continue to coach at whatever Rosen Coaching fees are at that time. Rosen Coaching requires 30 day notice by phone or email for cancellation of coaching services.

12 Month Program

- Client may cancel this contract by giving a one month notice to Rosen Coaching by Phone or email.
- Client will pay Rosen Coaching 50% of the "Discounted Price" or an additional \$75/month for months used including the last month. (Example: if two months were used then a 30 day notice was given, Client coached for 3 months; Client would pay Rosen Coaching 3

X \$75= \$225 to cancel the contract) There are no fees whatsoever for the rest of the unused months.

- All monies owed to Rosen Coaching Must be paid in full before the end of the last day of coaching
- If Client plans on discontinuing coaching services at the end of the 12 month period Rosen Coaching requires a one month notice.
- Upon completion of this 12 month program client may continue to coach at whatever Rosen Coaching fees are at that time. Rosen Coaching requires 30 day notice by phone or email for cancellation of coaching services.

Special Courses

Coach will recommend certain courses for you, available via the web site:

www.rosencoaching.com. You are not obligated to buy, although Coach will make recommendations. You can purchase them a la carte from the website for the listed price. Or you can purchase the "Special Package" (see below) at a special dramatically reduced rate. You will receive a memory stick with the programs in digital format. This is the easiest least expensive way we can "teach" you information so we can "coach" you during our coaching sessions. These courses can be downloaded directly to your computer in mp3, PowerPoint, Adobe .pdf and word document formats.

The "Special Package" contains:

This includes every product on our website at the time Client signs up for coaching.

At the moment we only carry one product produced by someone other than Rosen Coaching. That product is the "Understanding and Applying DISC" program. We are adding this as a special bonus. Eventually there will be other people who sell products from the Rosen Coaching site. These products will NOT be part of the "Special Package" program. If and when Rosen Coaching produces new programs you will be able to purchase them at the lowest offered rate as long as you are a Rosen Coaching Client.

This "Special Package" contains over 65 products that retail on the website if purchased separately for over \$2298

By signing up as a Rosen Coaching client, Client may purchase this "Special Package" for \$697. Plus \$25 for memory stick, shipping and handling. (There may be a small extra fee for shipping out side of the United States.)

There is no money back guarantee on this "Special Package" and all sales are final.

LATE FEES & SERVICE FEES

A \$25 late fee will be assessed to your account for any scheduled installment payment 10 days past due. A courtesy nine day grace period is provided, however all payments are due on their scheduled due date. Additional \$25 late fees accrue at 30 day intervals.

A \$25 service fee will be assessed to your account for any check that is presented to Rosen Coaching and subsequently returned or revoked for any reason.

A \$10 service fee will be assessed to your account for any scheduled credit card authorization that is not approved. Customer acknowledges responsibility to maintain a valid working credit card on file with Rosen Coaching. If a customer's credit card expires, the expiration date is often renewed for two years. Customer authorizes Rosen Coaching to increase the expiration date two years and retry card. If approved, Rosen Coaching will waive the initial \$10 service fee.

Call Procedure:

- Client will be responsible to call Coach at (808) 878-8384 on the day and time scheduled. The Client will be responsible for all telephone-related charges. (You may want to consider using a calling card. An MCI card can be purchased at Costco or Price Club at the rate of 3.5 cents per minute, which comes to \$1.05/session)
- Coach will do everything in his power to be on time and requests the same from Client. If Client is late for a call the session will still end at prearranged time and Coach may choose to reschedule and make up lost time at the sole discretion of Coach

Confidentiality:

- Everything we say remains confidential

Nature of Relationship:

- I may sometimes offer suggestions, but I am not a therapist or financial advisor, and although I am a Chiropractic business consultant and coach, you are completely responsible for all decisions you make
- Coach has a background and expertise in Behavioral Analysis, Coaching techniques and Chiropractic. The Client has been made aware that the **COACHING RELATIONSHIP IS IN NO WAY TO BE CONSIDERED OR CONSTRUED AS PSYCHOLOGICAL COUNSELING OR ANY TYPE OF THERAPY.**
- Client understands that Coaching results cannot be guaranteed and Client agrees that Client is entering into Coaching with the understanding that Client is responsible for Client's own decisions and results
- Client acknowledges that Dr. Rosen, Kat Rosen, Dr. Meyer, Teresa Carrao and Rosen Coaching and its employees do not give nor purport to give legal advice. It is recommended that Client retain legal counsel for any advice relating to compliance with applicable state laws, state boards etc. Client remains solely responsible for any decisions Client makes
- Client agrees to indemnify and hold Coach, Rosen Coaching and its staff and employees harmless and free from all liability and responsibility for any actions, results or adverse situations directly or indirectly resulting from any specific referral or advice given by Coach
- Client agrees to contact licensing boards, attorneys etc. around such issues as treatment plans, marketing, discounting services etc. Rosen Coaching will give ideas and it is Client's responsibility to clarify legality of such issues in Clients state.

Waiver/Enforceability:

- The waiver by Coach of any breach of any provision of this Agreement shall not be deemed a waiver of any subsequent breach of the same or any other provision
- If any provision of this Agreement or the application a provision to any person or circumstance be declared illegal, void, invalid, ineffective or unenforceable by any court or other authority of competent jurisdiction, the remainder of this Agreement or the application of such provision to persons or circumstances other than those as to which it is held illegal, void, invalid, ineffective or unenforceable shall not be affected and each other provision of this Agreement shall remain valid and enforceable

By signing this document I agree to all of the above.

Select one:

6 Month Program _____

12 Month Program _____

_____ (Print)

_____ (Sign)

_____ (Date)

Thank you!

Coaching Questionnaire

Let Rosen Coaching help you develop the life and practice of your dreams

You've had your free consultation and are now ready to continue the coaching relationship with Rosen Coaching.

The more we know about you and your practice the better we can help. Please fill this out to the best of your ability and feel free to estimate, or leave questions blank that don't apply. Try to answer as honestly as possible. You can trust that all of your answers will be held in the strictest confidence. When you are finished either email to drrosen@rosencoaching.com, fax to (808)878-8385 or mail to 59 Holomakani Dr., Kula, Hi. 96790. **Please make sure we have received this questionnaire at least 24 hours prior to our class or next meeting.**

What motivates you?

What is your life long dream?

Where do you really excel?

Are you aware of any "soft spots" that hold you back?

What are some of your healthy sources of energy?

Where do you get energy from that doesn't serve you, or is actually unhealthy?

What consumes your time that doesn't give you a wonderful PRESENT or FUTURE?

Tell me about your consultation, examination, report of findings and daily interactions. Do you do them? How long do they each take? What is your reason for doing them? How successful do you feel in each of these? Do you feel you could improve in these areas and if so how? (Please answer on a different page and take the time to go into **great** detail. The more I know, the better we can serve you.)

Which Chiropractic college did you attend?

How many hours per week do you spend in your practice?

Days	Hours clinic is open	Doctor is in the clinic
Monday:		
Tuesday:		
Wednesday:		
Thursday:		
Friday:		
Saturday:		

How would you characterize the focus of your practice (by percentage)?

Personal Injury/Worker's Comp _____

Insurance/3rd party _____

Cash _____

Wellness based _____

Pain/symptom relief _____

Liens _____

Do you adjust in

an open room

in private rooms?

How many staff do you have?

Full time _____ Part time _____

Do you feel you and your staff operate as a team?

Yes

No

Do you have a plan for retirement/financial independence?

Yes

No

What exam tools do you currently use?

Do you offer a health care talk to your patients?

Yes

No

If yes, how often do you offer them?

Do you call your new patients the first night for a "doctor's first call?"

Yes

No

Any other comments you would like me to know about?

Thank you!

We are personally very excited about the opportunity to help you achieve the life and practice of your dreams. We will be in touch with you soon. Feel free to contact us by phone or email at any time. If you do not hear back from us within 2 business days please contact us at drrosen@rosencoaching.com or call (808) 878-8384.



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