

## **ExcelUCan Training, Consultancy and Coaching Terms and Conditions**

### **The Training, Consultancy and Coaching Process**

Training courses, consultancy and coaching are not therapies, counselling or mentoring. Working in the capacity as a trainer, consultant or coach (as required) work is carried out with the client to empower him or her to achieve goals defined by the client.

### **The Client**

The client will:

1. Telephone, use video-conferencing, email or attend all meetings at the time that has been agreed.
2. Always be prepared for the training, consultancy or coaching sessions:
3. Check what you have achieved against your tasks;
4. List what is still outstanding with your explanation for not completing the tasks and email to me 24 hours prior to your next training, consultancy coaching session.
5. Consider what actions may be necessary prior to sessions.
6. Be honest at all times about what has been achieved.
7. Before each session, be willing to take the necessary actions that have been agreed.
8. Attend all sessions on time, and to conduct oneself in a manner, which is courteous, respectful and honest.
9. Be willing to have challenged any self-deceptions that could hinder the client's progress.
10. Be prepared to step outside his/her comfort zone into an achievement zone with my support.
11. Be willing and enthusiastic about trying new methods that I, as your trainer, consultant and coach, may suggest from time to time.
12. To work in partnership with me at, all times, on more than one area of your life.
13. Be prepared to work on the feedback, which has been received and agreed.
14. Ensure payment has been made before ALL training, consultancy or coaching sessions.
15. To request receipts in advance.
16. Return forms back promptly and fully completed.
17. Contracts which last more than a week must be cancelled in writing before the contract comes to an end.
18. 48 hours is required to cancel or change a scheduled appointment. Refunds will not be given but the date can be changed ONCE only.
19. If the client is late, the training, consultancy or coaching session will still end at the time previously agreed.

## **Disclaimer**

Training courses, consultancy and coaching are not intended to treat, diagnose, prevent or cure any disease or condition, and are not to be considered a substitute for the advice, treatment and/or diagnosis that you receive from a medical practitioner. Consequently, I do not provide a second opinion or attempt to alter the treatment plans of your physician. It is my role to provide ongoing support as you create an action plan to meet and maintain your goals.

## **Training Courses, Consultancy and Coaching Charter: Aims and Objectives**

The service provided will be conducted with a high level of professionalism.

## **Values**

I will conduct myself with integrity, and therefore in a manner which is courteous, fair, professional, respectful and honest.

## **Information and Assistance**

Whilst confidentiality of all my clients, at all times, will be maintained, I will share with you my knowledge, skills and experience, which are deemed necessary for the successful outcome of each training, consultancy or coaching session.

## **Confidentiality**

As your trainer and coach I will:

- Treat with confidentiality all the information that has been discussed. In accordance with the Data Protection Act, no part will be divulged to a third party (excluding, if necessary, over-riding legal bodies), without asking for the client's written permission in advance.
- Ask in advance for written permission from the client before releasing the client's name as a referee, for testimonials or publications.