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Building Strong Agreements and Contracts with Organizations

(What to do and what to avoid)

Successful engagements always begin with lots of clarity and grace. As a coach you ask the right questions and begin to identify key people, key objectives and the outcomes/markers that will spell solid ROI for an organization and its employees. You get clear on the scope of the agreement. As always, if new agenda and players appear, do some evaluating and updating of your agreement.

Whether you're a coaching leader or an external coach, when you begin to build a contract, in the words of Seth Godin, you answer a version of three core questions:

- *What happens first/next? What will you invite the organization to expect from you? What are your clear expectations of them? Who gets to weigh in on the agenda?*
- *What happens if things don't work out? If someone doesn't do what they say they'll do? Do both you and the organization have options to evaluate and conclude? Any time?*
- *What happens if things do work out? What if the organization and its people love what you do? What could upcoming stages of work together look like? Would your availability increase? Would your compensation change?*

In general, an excellent coaching agreement/contract unfolds like this:

- I. **The possibility opens up:** Someone contacts you or gets curious via your well-crafted way of talking about what you do. Usually, there's a sponsor/leader (i.e. the person paying you who may or may not be the person to be coached) and the coachee and/or coachee team. Maybe this is all new to them. Maybe this routine. You'll want to be prepared for either conversation.
- II. **You set up an informational interview** to explore the work and to engage with the sponsor (the person paying you) and/or the person(s) to be coached. Sometimes the person to be coached is a manager or team leader. Sometimes the manager or team leader is the sponsor of the potential coachee: Will they want to be actively involved with the process and in setting the agenda? Will they simply want periodic updates? It's good to find out.

Whether it's with the sponsor or the coachee, these first conversations are usually with a motivated influencer in the system. As always, start with the person who is most coachable and motivated. Remember, as always,

you're finding the agenda, getting clear about what outcomes and success look like, finding out who needs to be in this process, everyone's expectations, how evaluation will happen and the best ways to get started.

As always, if I invest plenty of unpaid time in connecting and getting clear about outcomes and agreements, it pays off in the long run. I don't charge for informational conversations—and in organizations sometimes there are several people to touch base with.

Some of the questions I tend to ask the potential coachee and often their sponsor or manager:

1. What would you like to work on?
2. How will you know we're making progress?
3. What are the personal strengths and values you could bring to this opportunity/challenge?
4. Who else is in your thinking as we talk about this?
5. How is this big enough to matter to you in the larger scheme of things (*to your vision and values*)?

Sound familiar? I may also be curious about:

- *What would you need and want to get better at along the way?*
- *What would your whole system—and its individual members need to get better at?*
- *What would the benefits be? For you? For your whole team or organization?*
- *If this really worked, what obstacles and opportunities would you take on together?*
- *What would you want to invite your team to expect from you?*
- *What would you like to expect from your team?*

And as always, these are questions to anticipate from a manager/sponsor when you are interviewing for a group/team gig. They may be direct, but these are the questions they will have about you:

1. What do you do?
2. What do you specialize in?
3. What happens as a result of your work?
4. What's the first thing you'll do? (Laymen's terms)
5. Then what happens? What steps? Structures?
6. Then what?
7. In your work,
 - a. What can you say is verifiable?
 - b. What have you seen is repeatable?
 - c. What is predictable?

Along the way I provide lots on information about how I'll approach things.

Keep asking yourself, "How do I like to work?" Figure out the what's and how's. For me this has been a combination of learning from people whose work I respect and from my own sense of how I'd want someone to contract with me.

- III. Once you decide it's a "match",** talk about the budget and explain your terms, how you see the stages of the work, how you'll evaluate progress and how you will charge for your time. It's here, after enough conversation, that I propose (in writing) a simple **Statement of Work** (SOW—there's an example below) which includes a

description of the work, deliverables, schedules, milestones and specifics as I see them along with how I'll bill for my time. As always, the agenda belongs to the coachee so the SOW may go through some collaboration. As Peter Block says, *"Offer tools to make the decision, not the decision."*

My approach is to charge enough to be generous. That is, when I put together a multi-faceted SOW, I think of it as a package and am clear about everything I include: Lots of accessibility and responsiveness. If I'm unsure of all the dimensions of the work, I may charge by the hour. Otherwise, if I have established a good idea of what the project or deliverable will require, I give my coachee a solid estimate of what I will charge for each stage of the work—and how we'll communicate and evaluate along the way.

Expect the organization that hires you to ask for your FEIN so they can send you a 1099. And they'll usually want proof of insurance. If you need to set up these things, check out [this page](#) on the SeattleCoach website.

IV. You have a signed agreement or SOW and you get underway: Scheduling, Engagement/ Implementation, Evaluation

In the initial phases of this work, I may spend several sessions coaching the sponsor or leader. As we build alliance, agreement and agenda, we may then expand the conversation to his or her larger team. ([The SeattleCoach Five-On-ramps for Developing Coaching Leaders](#)).

If we do, I like to have conversations with all the key players, either individually or together, keeping the sponsor/leader in the loop for evaluation and recommendations. As always, be thinking about their satisfaction and outcomes—and about their trust in you and your brand.

- Keep asking yourself, *"How do I like to work?"*
- Work hard on the details that matter.
- And never stop exploring the coachee's outcomes, problems and opportunities.

V. Extension, Recycle, or Termination. Again, Block writes:

"There are many options for ending the relationship and terminations should be considered a legitimate and important part of the consultation. If done well, it can provide an important learning experience for the coachee and the consultant and also keep the door open for future work with the organization.

"The deliverable is delivered, the gig is wrapped and the customer is happy. Heaven. It is the best time to offer your services for problems identified during the gig implementation. Market it, sell it, close it! You'd never have a better chance to promote your services.

"The gig went all wrong? Terminate it as if it was successful – with a smile. Keep doors open, never slam it. You might get another chance in the future with the customer. Is all the investment you made still worth something?"

As with the individuals I coach, I try to not make my agreements look like a EULA. I'm simple, clear and include all of the "here's-how-I-like-to-work" terms that matter to me. This keeps me on track, paying attention to the right details and generous.

Read more about it . . .

If you don't read anything else, read [Getting Naked](#). Patrick Lencioni. 2009.

From [Embedded.fm, episode #199](#), a conversation between a couple of engineer/developers about their contracts and agreements. A little geeky and meandering but potentially useful to our work too.

The ICF has put together [this great list of FAQs](#) related to staying ethically on-track as an organizational or team coach.

[Flawless Consulting: A Guide to Getting Your Expertise Used](#). Peter Block. 2011.

[The Speed of Trust: The One Thing That Changes Everything](#). Stephen M.R. Covey. 2006.

[Coaching in Organizations](#). Linda J. Miller MCC and Madeleine Homan Blanchard MCC. 2013.