



Your Coaching Guidelines Template

A one-page document you can customize with your own practice philosophy, policies, and session structure.

How to use this template: Fill in each section in your own words. Keep it to one page if you can. Share it with new clients before your first session, and review it together at the start of each new coaching package.

1. My Coaching Philosophy

A few sentences on how I work, what I believe about coaching, and what clients can expect from our time together.

2. Scope of Practice: What Coaching Is (and Isn't)

A brief statement of what coaching covers in my practice and what it does not. Coaching is forward-focused and goal-oriented; it is not therapy, counseling, or medical advice.

3. Session Structure

- Standard session length: _____ minutes (e.g. 45 or 60)
- How sessions start and end: _____
- What happens if a client is late: _____

4. Between-Session Contact

- When clients can reach me: _____
- Expected response time: _____
- Which channels (email, voice message, etc.): _____

5. Cancellation and No-Show Policy

- Notice required to reschedule: _____ hours
- Late cancellation policy (50%? 100%? grace period?): _____
- How no-shows are handled: _____

6. Payment Terms

- When payment is due (before sessions? monthly?): _____
- What happens if a payment fails: _____
- Refund policy: _____

7. Confidentiality and Its Limits

What I keep confidential, and the specific exceptions clients should know about before they share something sensitive: risk of harm to self or others, and legal court orders.

8. Emergency Protocol

What I will do if a client is in crisis: provide crisis line numbers (in the US, call or text 988), refer to emergency services, and document the conversation. My role has limits, and spelling them out protects everyone.

9. AI Tool Disclosure

If I use AI for notes, transcription, or communication, I state it here and confirm how client data is protected.

10. Review Schedule

When and how often we will revisit these guidelines together (at minimum, at the start of each new coaching package): _____

Client acknowledgement

Client name: _____ Date: _____

Coach name: _____ Date: _____

Made for coaches by Paperbell, the all-in-one coaching practice tool. Try it free at paperbell.com.