

## **Standard Coaching Package Service Agreement**

This agreement outlines the terms for a Standard Coaching Package Service provided to [Client's Name]. Subsequent follow-up Coaching or other services will be governed by separate terms and payment.

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## Standard Coaching Package Service Agreement

### Scope of Service:

- Two 2-hour Coaching Calls referred to as the
  - Discovery Call and
  - BluePrint Call
- 5-stage Discovery Call Workbook
- Initial report after Discovery Call
- Final BluePrint report, which includes
  - Your Roadmap to a Successful Business
  - Timeline for Business Development
- 4 Google Forms for information gathering and accountability during the process

### Structure of Calls:

These structured sessions will take place either on Google Meet or entirely within Pencil Spaces, including the video call. The calls will be recorded for your reference and to enable me to review them, ensuring that nothing is missed.

#### Discovery Call:

This 2-hour video call will include the use of an additional whiteboard from either Pencil Spaces or Miro to work through the Discovery Workbook question prompts.

#### BluePrint Call:

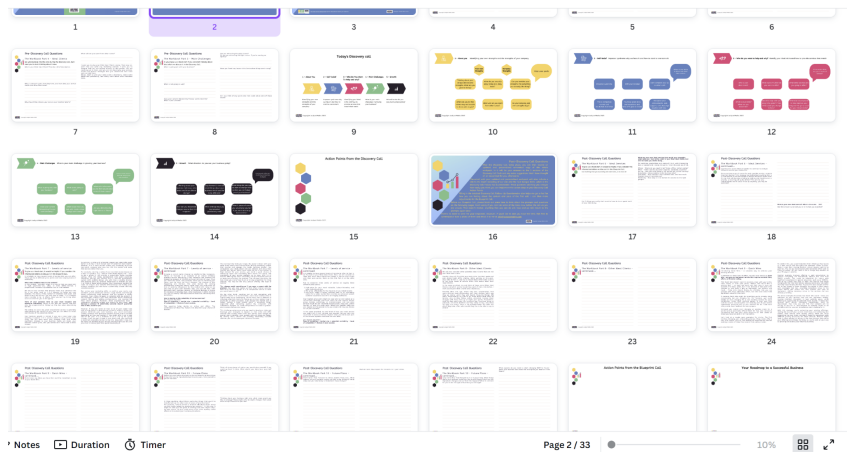
The second 2-hour video call will utilize all previous workbook prompts and Google Form answers to finalize your bespoke 'Your Roadmap to a Successful Business' and 'Timeline for Business Development'.

### Workbook:

You will receive the 33-page workbook. Parts 1-5 need to be completed before the Discovery Call. Complete Parts 6-10 after the Discovery Call and before the BluePrint Call.

You can send back answers via WhatsApp, email, or by pasting them into the Pencil Space board.

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## Google Form Questionnaires:

A series of Google Form Questionnaires are included throughout the Coaching Package.

### Standard Coaching Package Pre-call Questionnaire:

This questionnaire is an integral part of the entire process.

- It provides me with a wealth of background information readily at my disposal.
- I will conduct additional background research to gain a deeper understanding of who you are and your activities.
- From an external perspective, I assess how your business appears to potential clients, aiding in formulating relevant questions during our calls.
- This understanding of your motivations and drivers aids in tailoring our sessions to your specific desire for improvement.
- For you, this is a chance to reflect on the internal dynamics of your mind and business.

This information enhances my understanding of your needs and expectations, allowing us to focus our discussions more on addressing specific concerns and exploring potential solutions, rather than on initial fact-gathering.

<https://forms.gle/ia13KkAMcd7QrYtC7>

Please complete this on a laptop or PC, not on a mobile device. You will receive an email with your responses after submission. Should you think of more information later, you can retake the questionnaire. I will then merge your responses for a more comprehensive understanding. I will merge your responses to gain a more comprehensive understanding.

### Further Questionnaires:

There are three further questionnaires to guide you through the process.

- Discovery Call Follow-Up Questionnaire - <https://forms.gle/QraqEdaNxFQwCJH38>
- Blueprint Call Follow-Up Questionnaire - <https://forms.gle/NUBhMWUaeQGqHJME6>
- Final Feedback Questionnaire

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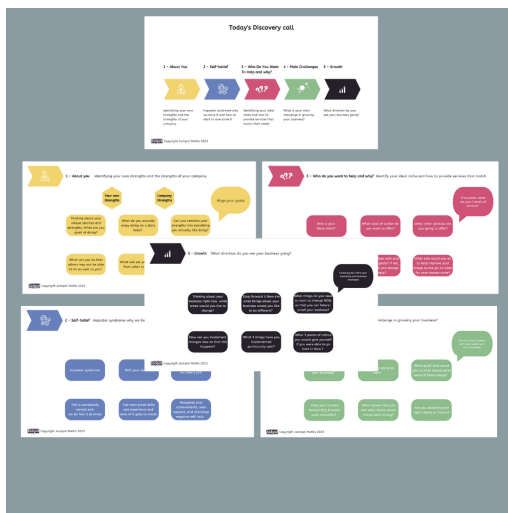
### Reports:

You will receive two bespoke key reports and documents during the coaching process.

- Initial report after the Discovery Call
- A Final BluePrint report, which includes
  - Your Roadmap to a Successful Business
  - Timeline for Business Development

### Initial report after Discovery Call

Using the discussions within the Discovery Call, all the information supplied in the 'Standard Coaching Package Pre-call Questionnaire' and all answers from the Workbook, an initial report will be written. This report will visually present answers to the five sections in the Workbook: 'About You', 'Self-belief', 'Who Do You Want To Help and Why?', 'Main Challenges', 'Growth'.

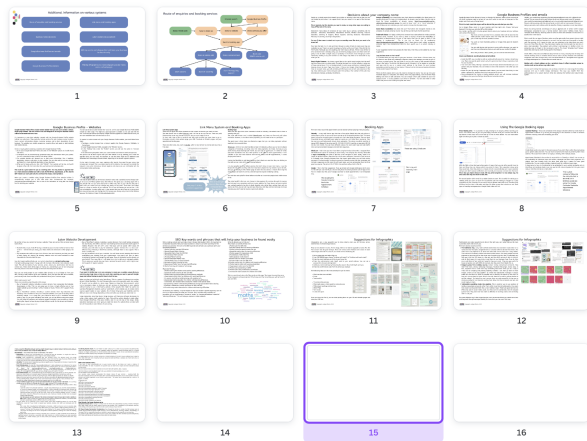


I will also update the pages of the workbook, Parts 1-5, to include your answers.

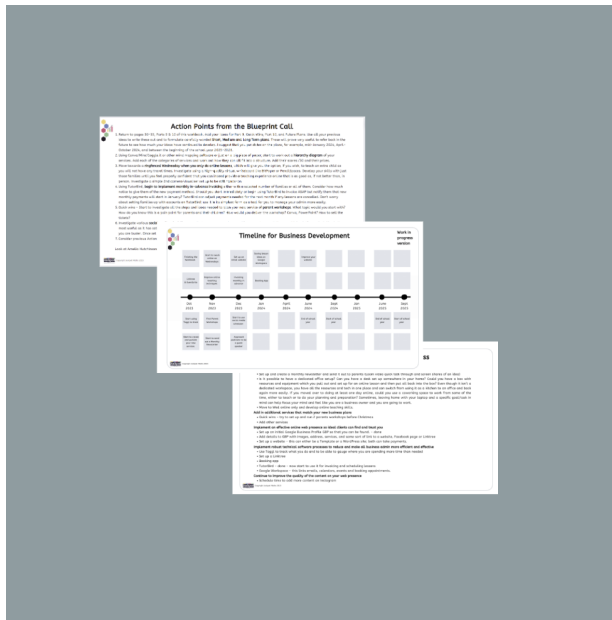
You will also be given 'Action Points from the Discovery Call' for you to work on between the two sessions.

You might also receive a document titled 'Additional Information', offering guidance on setting up systems like Google Business Profiles, Link Menu Systems, Booking Apps, business names, and websites.

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## Final BluePrint report:



Following the Blueprint Call, I will update the workbook to include any additional responses to the five sections. 'About You', 'Self-belief', 'Who Do You Want To Help and Why?', 'Main Challenges', 'Growth'. This includes updates to any of Parts 1-5 that may have changed. An updated 'Action Points from the Discovery Call' document will be provided, with completed tasks marked off.

'Action Points from the Blueprint Call' will outline the latest tasks for you.

I will also update the pages of the workbook, Parts 6-10, to include your answers.

Additionally, you may receive an updated 'Additional Information' document with further guidance on system setups and tools.

In addition you will receive 'Your Roadmap to a Successful Business' and 'Timeline for Business Development'

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After receiving all these documents you will have the 'Blueprint Call Follow-Up Questionnaire' which will help you evaluate your ability to follow through with the these tasks. Finally, any last-minute adjustments will be made to these documents, and you will receive their final versions, along with an editable 'Timeline for Business Development', allowing you to track your business progress throughout the year.

## **Confidentiality Agreement:**

### **1. Confidentiality in Group Settings:**

As part of the Standard Coaching Package, you may gain access to group calls and a private Facebook Group in the future. Understanding and respecting the confidential nature of any information shared within these settings is crucial. The details you divulge about your business, including financial information and strategic plans, are sensitive and potentially vulnerable to misuse. Whilst open discussions about hopes, plans, and vulnerabilities are encouraged for collective growth and support, members must adhere to strict confidentiality standards.

### **2. Personal Assurance from Jackpot Maths:**

I, Judy Brice, guarantee that any information shared with me, whether in one-to-one consultations or group settings, will remain strictly confidential. I am committed to maintaining the highest level of integrity and will not utilise any information shared by you to modify my own tuition model or for any competitive advantage. My role is supporting and mentoring, not capitalising on your vulnerabilities or strategic insights.

### **3. Mutual Respect Among Members:**

It is equally important for each member to exercise discretion and ethical judgement in handling information shared by others. It is strictly prohibited to use another member's insights, strategies, or financial details for personal gain, whether financially, strategically, or ethically. This policy is in place to foster a safe and trusting environment where all members can share and learn without fear of exploitation.

### **4. Agreement to Confidentiality:**

By participating in this Coaching scheme, you agree to uphold these confidentiality standards and respect all members' privacy and sensitive information. Breach of this confidentiality agreement may result in immediate termination of your membership and any further actions as deemed necessary.

## Payment and Cancellation Policy:

### Payment:

Your payment has been made on the Jackpot Maths website. This will usually have been one payment of £399.

You may have enquired about a split payment. In this case, you will have paid £200 using a hidden product link. This first payment will enable you to have the 1st Coaching Call, which is called the Discovery Call. The second payment of £199 will be due as soon as that Discovery Call has taken place. You will be given the hidden product link to enable payment. The Initial Report, Google Forms, BluePrint Call, and Final reports will not happen until the second payment has been made.

### Cancellation:

Cancellation of this package is only possible before any calls take place or any pre-call work is conducted. Partial refunds will not be given as a matter of course.

As mentioned earlier, payments made in split installments must both be completed before the reports and the Blueprint Call can proceed. Failure to make the second payment will result in the cancellation of the package, and no refund will be issued for work already undertaken.

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### Terms of Agreement:

You acknowledge and accept these terms by participating in the first scheduled call. If there are any concerns or disagreements with these terms, please contact me before the call for a discussion and possible refund.

Should misunderstandings or disputes arise, both parties commit to engaging in open communication to seek a mutually agreeable solution.

### Final Acknowledgement:

Please make sure that you have thoroughly read and understood all aspects of this agreement. Your engagement in the Coaching scheme signifies your acceptance of these terms and commitment to collaborate to support your business needs. I look forward to a fruitful and supportive engagement.

Judy Brice

Edu-Trainer

JMB Educational Services Ltd, also trading as Jackpot Maths

Empowering Educators to Support Neurodiverse Children More Effectively

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