

## Coach pool application requirements and process

This document explains the requirements and process if you wish to apply to join the Coachbroker pool.

### Introduction

Being an international online service, we need considerable information to confirm the high standard of all our coaches and to provide the system functionality our clients expect. We have endeavoured to make the process as user friendly as possible, with online lodgement and access to an entry level coach site for completing different stages of the application. We have not set a time limit for applications, but we aim for the process to take a minimum of three weeks and no longer than three months.

Clients and programs are not available to you until final coach activation occurs, so we ask that you proceed through the application process at a steady rate with the aim of completing it within a month. Much of the process is within your control, and we are happy to answer questions and provide advice along the way.

### Stage 1

You can apply online from within the international site or where specific country application is desired please select the country of choice and apply from that particular site. The initial application stage presents you with pages of criteria to complete, and you need to complete every question (or respond to each request for information) to activate submission to the next stage

Stage 1 requires the following information:

	Criteria	Entry data
<b>1</b>	Your details	Mr Mrs Ms Dr Other First name            Family name
		Email                Re-enter email
		Work                Mobile
		County / state code    Country code
		Country (or countries)
		Additional countries serviced with coaching
<b>2</b>	Coaching experience	Number ( <b>five or more</b> years preferred)
<b>3</b>	Commercial experience	Number of years
<b>4</b>	Number of coachees per year	Number
<b>5</b>	Coaching qualification / training accreditation / recognition	Tick selection Other—provide details
<b>6</b>	Other qualifications	Qualifications obtained
<b>7</b>	Industry background	Tick selection
<b>8</b>	Business background	Tick selection
<b>9</b>	Coaching specialisation	Tick selection
<b>10</b>	Coachee—client level	Tick selection
<b>11</b>	Affiliation / membership	Tick selection <b>Or</b> Name of equivalent
<b>12</b>	Coaching tools certified	Tick selection
<b>13</b>	Other services provided	Tick selection

<b>14</b>	Professional indemnity insurance cover	Indicate if you have current cover
<b>15</b>	Public liability insurance cover	Indicate if you have current cover
<b>16</b>	Coach supervision	<b>Tick YES or NO</b> (If yes, then please provide details—type, frequency, supervisor name and qualifications)
<b>17</b>	Disclaimer and authorisation	Tick selection
<b>18</b>	Additional comments	<i>Input box provided</i>
		<b>Submit box</b>

Once you complete each field of the stage 1 criteria, you can activate a ‘Submit’ button to transmit the data to our system and advise us of your application.

Coachbroker will review your application and, if it meets our initial criteria, approve it for stage 2 processing. You will receive a response email providing you with a personalised password to enter the ‘Coach’ section of the Coachbroker™ portal and thus proceed to stage 2.

## Stage 2

In this section, you will be asked to provide your résumé and further backup information, and you can start building your profile in the system. The résumé template is a brief and easy-to-follow guide to providing the detailed information we need to process your application. We are happy to receive this information in any format or order, but please ensure you cover all subjects required. We will hold your résumé confidentially, and no-one outside the Coachbroker application process can view or use it.

Stage 2 also requires referees, so you will need to provide details for five coaching contacts from whom we can gain feedback. Once you are happy with the data you’ve provided and confirm that the referees are aware of our request, then the system will contact the referees for preliminary feedback. We also have the option of contacting them directly if required.

The biography and coach profile templates have been designed to assist coaches to best present their personal attributes and capabilities to both clients and coachees accessing and using Coachbroker services.

Stage 2 requires the following information:

	<b>Criteria</b>	<b>Value / measure</b>
<b>1</b>	Coach referees	Please provide five referees whom we can contact for feedback on your coaching. We will contact referees via an online form. <b><u>Click here for a sample of the questionnaire that will be sent to referees.</u></b>
<b>2</b>	Up-to-date résumé <i>You will be able to attach your résumé to your site when you are happy that it includes all our entry requirements.</i>	The résumé must include the following: <ul style="list-style-type: none"> <li>■ General summary</li> <li>■ Commercial experience</li> <li>■ Academic qualifications</li> <li>■ Coach-specific training/qualification</li> <li>■ Professional coaching experience</li> <li>■ Professional affiliations/memberships</li> <li>■ Reviews from 10 coachees</li> <li>■ Coach supervision</li> <li>■ Continuing professional development</li> </ul>

3	Coach training institution accreditation / recognition and / or coaching qualifications	Please provide details and attach documents.
4	Professional indemnity and public liability insurance cover	Attach certificates of currency.
5	Police check (Australian and New Zealand requirement)	Please apply for a police check from your local department. Submit online, fax to us or direct to Coachbroker by mail..
6	Passport <b>and / or</b> work permit (Not for Australia and New Zealand)	Please attach a PDF copy of current documents. For a passport, just a copy of the information page is required..
7	Biography, testimonials, case study and photograph	Please follow the prompts and complete the template fields. You can view your profile sheet from within the system at any time, so please do so to check content. And please attach a photograph, preferably taken within the past 12 months.

Once you complete all fields within your site, you will trigger a data review by the Director of Coaching. Also at this stage, your referees will have had time to return the completed forms to Coachbroker. If we require further names, we will advise you at the next interview stage.

The Director of Coaching will contact you for the first time, to conduct an interview and discuss coaching practice. This one-hour interview will be booked in advance and will give both parties the opportunity to understand the coaching required and provided. It will also help establish the high-touch relationship we aim to achieve with all our coaches.

If the Director of Coaching requires further information, or suggests you need more training or experience, then such matters will be discussed during the interview. We can keep your application within the system for fast processing at a later date.

If the Director is happy with all aspects of your application, then you progress to stage 3.

## Stage 3

Stage 3 requires the following information:

	Criteria	Entry data
1	Coach profile	Complete the online data input so the profile gives an accurate picture of you and your coaching. This is your sales pitch to the client / coachee.
2*	Code of ethics	<b>Sign</b> a copy of the International Coach Federation Code of Ethics, including name and date, then <b>fax</b> to Coachbroker.
3*	Coachbroker™ System coach service agreement	<b>Sign</b> a copy of the coach service agreement, then <b>fax</b> to Coachbroker.
4*	Coach fee for service	<b>Enter</b> gross figures (excluding taxes) of your default program fees. (Note: you can alter your fees later and vary them for each client.)
5*	Coach business information	<b>Enter</b> your business name, registered address and business registration number.
6*	Statutory tax requirements	<b>Enter</b> details for VAT / GST / Sales Tax / state taxes etc.
7*	Bank account details	<b>Enter</b> the bank name, full bank address, bank and branch identifier numbers, and your bank account name and number.

As soon as you lodge all the criteria data and documentation for stage 3, the Coachbroker™ system automatically advises the Director of Coaching that you have met all requirements and are system ready to be recognised as a member of the Coachbroker pool of authorised coaches.

After deciding that you qualify as a member of the pool, the Director of Coaching will trigger an email confirming your acceptance and transition to the 'Active' stage. You will then be eligible for client selection and the support services that Coachbroker offers.

**\* For international, UK and NZ coach applications, the process will stop at stage 3.1 until the international site rollout is completed and country licensees are appointed. At this time, the final application stage will commence, and we expect to take only a few days to 'activate' coaches.**

## **Notes on the application process**

### **Fee management**

Coachbroker does **not** set fee rates for coaching programs. At stage 3, you are requested to provide your default fees for the 10 and 15 session programs, covering both face-to-face and telephone supply. When you become active within the system, these defaults will be used to populate fields. You can alter your fees at any stage before contracting, and you have the option to alter them for each client.

The initial default fee information is important for checking your commercial understanding of the executive coaching rates within your market, and also the level at which the market values your services. If required, the Director of Coaching may offer some feedback and information regarding an applicant's nominated fees.

Contracted clients may set a maximum organisational program fee structure, which is recorded in the system for coach viewing. Any other contract conditions set by a client are notified to coaches via 'Client notes', and coaches have the option to download such information before deciding whether to offer supply.

A client's set maximum fee per program is one of the main criteria for determining whether you are in the pool for future coachee searching. We have designed the system to provide choice of coach by the coachee; if you are shortlisted, then the system will notify you to contact the coachee for interview and / or meeting. If you are selected by the coachee and approved by the client, then you have the final approval to accept the program and activate all coaching and management / administration functions of the system.

The Coachbroker™ system has an automated program contract and financial process that invoices the client progressively, in advance, during each coaching program. The client pays all fees to Coachbroker, and once we receive the fees, we deduct the system brokerage fee and pay the remainder immediately (via electronic funds transfer) to the coach's nominated bank account. The system is designed to produce and issue appropriate tax invoicing to comply with local statutory requirements.

## **Referees**

In addition to the coachee referees supplied at stage 2, we may seek references from other sources (for industry experience, supervision etc.) to support application documentation. If required, the Director of Coaching will discuss this with you at the interview.

When providing contact details for any referee, please be thorough in providing the referee's work (or best contact) email address, work telephone and mobile numbers (complete with all international dial codes) and work position / management level.

When you nominate a referee, advise them that Coachbroker may contact them by email and / or telephone to discuss the referral provided, and that Coachbroker has your authority to make any enquiry.

**The Coachbroker™ system has strict confidentiality and privacy guidelines and protocols for managing contact and communication.**

## **Security**

Some transnational corporate clients request more substantial security clearance information for coaches sourced from the Coachbroker pool. Some country jurisdictions have police reference mechanisms, for example, that provide a form of 'clearance' acceptable to clients, so coaches may be asked occasionally to produce a copy of their Police National Computer record or similar documentation.

## **Contact us**

If you have any issues or questions, please go to the 'Contact us' link on our website and send us a note. We will aim to get back to you within 24 hours.

Thank you for your application. We look forward to working with you.

## **Coachbroker**