

Welcome

You have chosen to use me as your coach. I appreciate the opportunity to work with you. I have prepared the following Coaching Q&A and the enclosed materials to assist you to get the most from your time and out of our relationship.

WHAT IS COACHING?

Coaching is a form of consulting. Like a consultant, a coach helps you and/or your firm to:

- ▶ Solve problems
- ▶ Reach goals
- ▶ Design a plan of action
- ▶ Make decisions

In addition to the above, the coach "stays with" (coaches) the client to:

- ▶ Implement the plan of action, working through the inevitable changes and any obstacles.
- ▶ Maintain a healthy balance between your personal and professional life.
- ▶ Keep looking ahead to take advantage of opportunities which are just now formulating.
- ▶ Bring out your personal best, keeping focused on your needs, values and vision.

All coaches are consultants; few consultants are coaches.

WHAT TYPE OF GOALS CAN A COACH HELP ME ACHIEVE?

Every coach has several specialties. That is, they are trained and experienced in helping clients reach several types of goals. All told, there are over 40 coaching specialties. I work with:

Entrepreneurs who are at one of the following places with their business:

- ▶ Want to Double Sales or Profits. Ready to blow the roof off? Fully committed but needing a specific plan of action? Want strategic planning to make the most of the resources you have?
- ▶ In Trouble. Can't meet the payroll? Are sales declining? Problems with key staff? Having personal conflicts or problems? Too much stress? Business too successful, too fast? Time and prioritizing problems? Ready to bankrupt?
- ▶ Making Changes. Adding a new product or service? Starting a new business? Wanting to shift your focus from one area to another?

I also train those wanting to be coaches and to develop a full practice. Call for a catalog on the Coaching Intensive and Mentoring Program.

Professionals like stockbrokers, Realtors, trainers, therapists, sales representatives, consultants and health professionals such as physicians, chiropractors and others who:

Want a Full Practice. Ready to be FULL? Upgrade your clientele? Become irresistibly attractive rather than promotion-based? Find and develop a high-level referral network?

Are Ready to Be Leaders. I work with pros who want to be #1 in their firm, be recognized as a master in their field and/or develop a model reputation.

Are Committed to Being Financially Independent, Sooner. Professionals and entrepreneurs are uniquely positioned to make a lot of money. My job is to help you make more and keep much more.

Managers & Executives responsible for the success of a sales team, branch or division, who need to:

Reach high targets and quotas. Accomplishing this consistently requires a manager who also coaches the team to work together to reach unreasonable goals. I coach managers/executives and show them how to coach their people to reach these targets.

Pull off large projects. Successfully completing projects and implementing programs such as enhanced customer-service and Total Quality Management-type systems takes focus. And having your own coach can make the process easier. It helps to have someone to speak with as you face this type of challenge.

Increase productivity, substantially. No longer an option, substantially increasing productivity is a primary focus for many firms. A coach advises on how to upgrade the company culture, develop teamwork based on values, align departmental goals with the company's mission and shift the firm to be innovative and profit driven, not just the gung-ho-more-is-better-work-harder-and-we'll-all-make-it approach, which is simply not effective in today's market.

WHY DOES COACHING WORK?

Coaching works because it brings out your best. A coach believes you have the answers and is trained to bring them out (painlessly)!

Specifically, this is what I do with you during our coaching sessions:

Listen. I listen fully. You are the focus. I listen to what you say, what you are trying to say, and what you are not saying.

Share. After you have fully communicated, I share with you my advice, ideas, comments and views on your situation, dilemma or opportunity.

Endorse. Anyone who's up to something - an entrepreneur, a manager with an extraordinary objective, a professional filling the practice needs - yes, needs - an outside voice full of endorsement, compassion and acknowledgement. Not as a yes-type person, but as someone who knows what it takes to achieve.

Suggest. I want a lot for you. I want you to be healthy, happy and successful. I want you to be on a strong financial track. I want you to enjoy your family and friends. I want you to have a life that inspires others - and yourself. Part of my job is to be at least 3 steps ahead of you, yet be with you. As such, I make requests and suggestions. And, you are the client.

WHAT IS THE FEE?

I charge \$150 per hour.

HOW DO YOU WORK?

I work mostly on the telephone: It is called telecoaching. You call me at a local or toll-free number at a pre-scheduled time. Most clients call me once per week at the same time each week. Calls last 25 or 55 minutes. The monthly fee, payable in advance, for the 25 minute call is \$300; for the 55 minute call, \$500. Additional time is billed at \$150 per hour. Clients may meet with me, but most find the telephone to be most efficient (and practical, since all of my clients live outside of the town, where I am based).

WHAT OTHER SERVICES DO YOU OFFER?

In addition to coaching and telecoaching, I:

- ▶ Lead workshops and trainings: Referrals Right Now, Values/Goals Alignment, Certified Coach Program, Coaching Intensives, PowerSource and others.
- ▶ Deliver presentations and keynotes: Coaching Employees for Productivity, Entrepreneurial Success, Goal Setting for the Best Year Ever, From Transition to On-track, and others.

- ▶ Assist with proposals: Loan packages, business plans, corporate sales proposals, project outlines and others.
- ▶ Write seminars and programs: Public seminars, corporate training programs and others.

WHAT CREDENTIALS DO YOU HAVE IN ORDER TO COACH?

The primary credentials of any coach is the assessable success of his or her clients. Additionally, I have:

- ▶ Practiced for 10 years as an accountant and Certified Financial Planner
- ▶ Led full-day workshops for over 8,000 participants
- ▶ Trained over 100 coaches
- ▶ Co-founded the National Association of Professional Coaches and co-wrote the NAPC Certification Examination
- ▶ Coached over 200 clients since 1988

Currently, I work with 40 clients. References are available upon request.

WHAT ELSE SHOULD I KNOW ABOUT HOW YOU WORK?

There are several administrative guidelines that you should know:

1. Fees are paid in advance, due on the 1st of each month.
2. Your time slot is your time slot. Please don't try to reschedule. In an emergency, we can, however, make our time together a priority. If you are going on vacation or can't make a call one week, we will make up the time before you leave or after you return. You may call me on the toll-free number: -
_____. From time to time when you call, you may get my voice mail asking that you call another number to reach me at. This number will be a local call or the toll-free number. The toll-free number "follows me" to where ever I am, since I lead workshops in New York, Houston, Florida and California.
3. The monthly fee covers four sessions per month. And, every three months, there's an extra week on the calendar. I take that time off to restore and there is no coaching call. The dates for 1993 with no coaching call are available upon request.

WHAT DO YOU EXPECT OF YOUR CLIENTS?

I ask that you grant our relationship enough room so that you can reach your goals quickly. What that means is that you be willing to tell me all of what you are thinking and feeling and that you be willing to listen to what I have

to say. And, you should take the time you want to develop the trust you need between us.

Please read the articles and materials that accompany your Welcome Packet.

WHAT CAN I EXPECT FROM YOU, AS THE COACH?

You can expect me to be:

Unconditionally constructive. No matter what happens during our call, you can expect me to say only those things which further your life and your goals. If you are disturbed, I do understand. If you are stuck, I will be patient. If you can't wait to share a victory, I will celebrate with you. I will not make you wrong, criticize you, complain to you or gossip about you.

Straightforward. Yes, one can be unconditionally constructive and still speak straight. From time to time, I will ask you to begin, end or modify something. And, I will honor your right to refuse.

ABOUT CONFIDENTIALITY?

A coach doesn't gossip. That means that what you are doing, how you are doing, what you have accomplished, and your personal secrets and shares are not discussed or hinted at by me to anyone else. From time to time, the person who referred you to me may ask how you are doing? My stock answer: He/she is doing just fine. (Period.)

My client list is confidential. People may know you are working with me, but that information won't come from me.

SPEAKING OF REFERRALS...

My practice fills by referrals. If you are benefiting from our relationship, I expect you to suggest that appropriate colleagues and friends of yours speak with me.

I know many full-time coaches practicing in the U.S. I will be happy to speak with anyone you send me, and, I will introduce them to the coach who I think is qualified and "right" for their needs, whether it is me or another coach.

Thanks!

Thanks for the chance to serve. Please fill out the Welcome Packet and return to me ASAP.

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