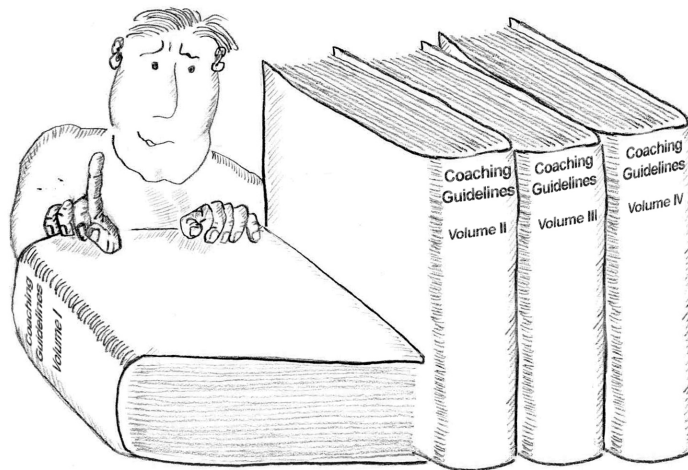




- Could I please have  
the cliffs notes?



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COACHING GUIDELINES  
(SUMMARY)

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## THE GOAL OF COACHING

Our ultimate goal is to help you operate from your best self, in a way that is satisfying for both you and others, both in the results you reach and in the way you reach them.

A brief pause from the frenzy of your day, coaching is a resource designed to help you take stock of how to use the insights and tools acquired in the workshops, apply them to your most pressing issues, and make progress on your most important goals.

## SCHEDULING COACHING

In our experience, the participants that diligently work at making incremental progress through their difficulties are the ones that grow most radically by the end of the program. The following is what we recommend to help make the most out of your partnership with us.



### Ego Coaching Call = 1 hour/ every other week

The typical frequency of coaching is one session every other week. The coaching is one hour long: the first 5 minutes of the scheduled hour will be to take stock and review your agenda for the call, the phone call portion with your coach will start at 5 minutes after the hour and will last 45 minutes, and the last 10 minutes of the hour are for you to clean up your notes, gather your thoughts and plan your homework (see p. 7).

In consideration of our mutually busy schedules, please call *on time*.  
The LaL office number is (415) 453-5050

### Weekly Taking Stock = 15 - 30 min./week

One of the most challenging aspects of self-improvement is not losing momentum in your change efforts. To ensure steady progress, we strongly recommended you schedule a weekly time to take stock of your evolution, especially during the weeks that you do not have coaching.

### On-Going

During the week, keep a record of valuable coaching data including pinches, difficult situations, dissatisfying interactions, and areas where you feel stuck. Review these with your coach to work on improving your approach to them. It is always easier to make a note in the moment than to try to remember right before the coaching.

## OPTIMIZE YOUR COACHING SESSION

The break down of the coaching session:

1. Prepare for the call (5 min. prior)
2. Coaching call with your LaL coach (45 min.)
3. Recap and anchor learnings from the call and email your Roadmap (referred to later in this document) to your coach (10 min.)

During each call, we will review a tool or concept from the LaL methodology and support you to apply it to different situations and challenges in your life. At the end of each call, your coach will inform you of the topic to be covered in the next call.

### BEGINNING OF THE COACHING CALL (5 min.)

**Take a moment before each call to transition from what you were previously doing, and reconnect with the goal and agenda of the coaching.**

- **Make sure to call from a quiet, private place** where you feel comfortable talking about anything (avoid being near colleagues or family, and close your office door).
- **Turn off any distractions, such as your email or cell phone.** If necessary, please let your assistant know that you are not to be interrupted.



**Pull out your notes from the last call and from your Weekly Taking Stock:**

Considering the topics discussed in the last coaching call as well as any practices and homework given, evaluate what progress you have made and where you are stuck. What support would be valuable from your coach?

**Pull out the charts and notes related to the topic of the call**

- 1- Do I understand the essentials of this concept? Do I have any questions about it?
- 2a- Specifically: How does this Ego Tool apply to my life?
- 2b- *[optional]* For a broader perspective, ask yourself the same questions with regard to your AFI's (Areas for Improvement) and Challenges, once you have defined them with your coach. How does this concept apply to those situations?

**Reflect: What is currently on my mind (not necessarily related to this topic)**

What topics are currently on my mind?

What has happened in the last two weeks?



## DURING THE COACHING CALL (45 min.)

### Typical sequence of the call

<b>1. General Check-in</b>	<b>(5 min)</b>
<b>2. Review of last call</b>	<b>(5 min)</b>
<b>3. Today's Ego Tool</b>	<b>(30 min)</b>
<ul style="list-style-type: none"><li>▪ Rapid review of the concept or counter-productive mechanism</li><li>▪ How is this tool relevant and present in your life?</li><li>▪ Connect to your Areas For Improvement (AFI) that you want to work on over the year, and your challenges</li></ul>	
<b>4. Conclusion</b>	<b>(5 min)</b>
<ul style="list-style-type: none"><li>▪ Summarize the main take-aways and learnings</li><li>▪ Define experiments, practices and/or homework</li></ul>	

### Put the most difficult issues on the table

In addressing our most difficult issues, we are actively working on our ego, and it is in these moments that we are most resistant and uncomfortable. Thus, the following suggestions are important to remember:

- **Pay attention to your defensiveness:** If you are feeling reactive to something, please put it on the table for discussion.
- **Be transparent/vulnerable:** Track the subjects, topics, or issues you feel uncomfortable sharing, and instead of numbing them or obsessing silently about them, bring them to the call.

(For more behaviors that optimize coaching, refer to *Coaching Commitments*)

### Take comprehensive notes

We provide a word document as a template for this purpose, which we encourage you to use.

Just go on your seminar chart link, download the file called *JoeSmith\_CoachingRM.doc*, change the name of the file to reflect your name (in place of "JoeSmith") and the years of your current 4-Mastery Program. Please refer to the annex for further instructions.

### Update section A, B and C of your RoadMap

The section A, B and C at the beginning of the document will help you organize your take-aways, commitments, practices, homework and Areas for Improvement. **This**

**will allow you to keep a global vision of your work and evolution over the year, and provide you with easily accessible information to complete your Case Study, which you will present during Sustainable Mastery.**

## **AFTER THE CALL (10 min.)**

We consider the coaching to be an hour long: 5 minutes to prepare the call, 45-min on the phone with your coach, and 10 minutes on your own to clean up your notes and plan your homework. This process of cognitively mapping your learning will result in retaining and owning the revealed insights.



### **Clean up your notes from the call**

Including section A, B and C of the coaching roadmap.

### **Recap of Learnings**

Summarize in a few bullet points what was meaningful for you. (Use the designed area under “Summary” below your “Notes” in Section D)

### **Debrief post-call in your coaching Road Map document**

Answer the questions below “Summary” (still in section D). They will help you to make sure you are not avoiding anything: *“How do I feel about this call? Energized? Is there anything that is weighing on my mind that I didn’t mention? Anything unclear? Anything I am incomplete about?”*

**Please send your RoadMap to your coach within 48 hours.**

## **OPTIMIZING YOUR WEEKLY TAKING STOCK**

The time between coaching sessions is when you are most likely to get distracted by your busy life and lose track of the improvements you want to make. If you want to sustain significant change, you need **to create momentum by continually thinking about relevant topics and practice change with regularity**. This is why we recommend taking stock weekly. *We suggest scheduling about 15-30 min. of uninterrupted time (preferably early in the morning) at a regular time every week.*



### **Take stock of your process**

- 1- Review the content of your RoadMap and your last coaching.
- 2- Consider your current coaching topic, practice(s), and decision(s): Where/how are you progressing? Where/how aren’t you? Where/how are you feeling stuck?
- 3- Have you done your homework yet (if any)? Otherwise plan to or do it right away.

4- Once in a while, consider the themes of your Areas for Improvement and your Challenges: How are you progressing? How aren't you? Where are you feeling stuck?

**Capture the essential conclusions in your RoadMap (section D) & send it to your coach.**

## COACHING COMMITMENTS

In order to create a safe learning environment we both need to follow certain guidelines.

### MY COMMITMENTS AS A COACH

The following statements are the guidelines I commit to as your coach:

- 1. I will encourage mutual exploration of sustainable and systemic approaches (vs. give quick-fix solutions).**

We have discovered that more often than not “the problem is not the real problem.” In other words, the issue we presently see is not the one really bothering us. Rather, it is a symptom of a different problem that we are unaware of at the moment. Based on this knowledge, we will often be exploring the deeper problem underneath the one that is initially expressed.

Also note that although I may suggest ways to view reality differently or to approach a situation more effectively, we will always work to help you access your own wisdom, as you are ultimately your own life's expert.

- 2. I will be a genuine partner in working through the challenging situations you are faced with (vs. sitting by as a judge and criticizing you).**

It means that I don't judge failure as representative of your self worth, but more appropriately as a learning opportunity. Moreover, I will not add my judgments and norms to the subjects you raise, especially if they are sensitive or taboo for you. If for any reason you interpret my contribution as judgmental, please address it with me.

- 3. I will take the risk to say what you might not like to hear to support you with your goals.**

This means that you might at times have reactions to my coaching, especially when I challenge you. As long as you don't forget that I have your best interest in mind, we can work through your reactions.



“Let's try it again. And this time, don't cross your fingers.”

In short, my commitments mean that sometimes I will listen and dig with deepening questions, and sometimes I will be provocative and challenging, always with the goal of being supportive.

## RECOMMENDED COMMITMENTS FOR THE COACHEE

I will not check if you are actually committed to the following, but it goes without saying that the more you invest yourself in the coaching process, the more you will benefit.

- 1. Candidly search for and express your struggles, problems and areas for improvement (vs. try to appear perfect and flawless).**
- 2. Express problems and challenges as simply and genuinely as possible (vs. inflate or minimize them).**
- 3. Address candidly what you are experiencing and struggling with (vs. look for the “right answer” that would please me).**

- 4. Explore the ways that what I suggest might be relevant/useful (vs. justify and explain or resist change in some other way).**

Caveat: In the end, you usually know best where your Ego is. So, if you believe there is a more important thread to explore, please communicate that. This can be tricky since we develop many unconscious strategies to protect our ego.

- 5. Proactively search and discover your blind spots (vs. fear the gap between how you view yourself and how you really are).**

We often act like ostriches, burying our heads in the sand, hoping that if we don't see our issues they won't exist. It requires intention and dedication to discover our blind spots.

In other words, the main challenge for you is to approach coaching without a performance mindset, and instead focus on learning. Please trust our commitment to support you, and enter each call ready to work on what you are struggling with.

In conclusion, we have seen during seminars why it is important to actively search for our Ego, and to discover where and how it plays out in our lives. Coaching is a means to do just that.



## RULES AND REGULATIONS

If you have any questions, please feel free to ask your coach.

### COACHING SESSIONS INCLUDED IN YOUR PACKAGE?

- **Stand-alone seminar** includes 3 follow-up coaching sessions.
- **Module** includes 9 coaching sessions.
- **The 4-Mastery program** includes 12 months of coaching.

*Additional coaching sessions may be purchased independently in certain cases.*

### EXPIRATION DATE

Unused coaching sessions may be used up to 6 months after the purchase date or 6 months from the last seminar attended. 4-Mastery participants have 12 months of coaching; we start counting the months from the first seminar attended.

### 48-HOUR CANCELLATION POLICY

In consideration for our mutually busy schedules, our policy requires a minimum 48-hour notice for rescheduling a coaching call. Without a 48-hour notice, you will be charged for the missed call. Of course, this excludes emergencies. Since even a 48-hour notice does not give coaches a lot of time to offer the open slot to another client, **please let us know ASAP when you have to reschedule.**

For 4-Mastery & Module Participants: in the case of a cancellation without a 48-hour notice, the session will be “missed” and the call will be scheduled for 2 weeks later. Alternatively, you can choose to be invoiced for a make-up call.

For Stand-Alone Seminar Participants: since 3 coaching sessions is the bare minimum required to truly understand and experience what coaching can offer, each coaching session cancelled or missed without the minimum 48-hour notice will be invoiced.

### RECORDING

Coaching calls are audio recorded by your coach for internal training purposes. The recordings are kept in total confidence. Calls will be recorded unless you ask otherwise.

## CONFIDENTIALITY

Coaching is most effective when we create a safe space in which you feel comfortable discussing any subject. Therefore **the personal information you share with your coach during coaching calls is kept confidential within Learning as Leadership<sup>1</sup>**. None of the specific content of your coaching session will be shared with anyone outside of LaL unless you give a verbal agreement.

When working with groups, there are certain types of content that we do NOT consider confidential. For the sake of clarity, these are:

- **The regularity of your coaching calls.** We may inform your sponsor if you are not attending your sessions consistently.
- **A general overview of team/family progress.** To help a leader stay grounded in how his/her team is evolving, we may report to him/her about *themes* we have heard through different coaches (keeping names and specifics confidential).

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<sup>1</sup> Note that we may discuss certain aspects of a coaching call with another LaL coach in order to improve the effectiveness of our support to you.

## APPENDIX - MANUAL TO YOUR ROAD MAP

### A- Themes of your Areas for Improvement

Although each coaching session is focused on a specific topic, there are personal themes (types of fears, reactions, considerations) that can be worked on for multiple sessions,

Theme	Skills	Counterproductive Behaviors

throughout the entire 4-Mastery Program, & likely over a lifetime. A theme may be somewhat unclear at first, but you may feel like it is connected to your core and carries an

emotional component. When you create a title for one of your themes, you can then connect it to the skills that would help you address it, and to specific counter-productive behaviors that you would like to change. It is unlikely that you will complete this chart right away or that you will have a lot of new entries. Refine your findings as the year progresses.

### B- Commitments / Decisions / Practices / Experiments

Decision / Practice	Intent / Goal / Notes	Date

Enter the coaching date.

Describe the Decision, Practice, or Commitment.

Add any notes, in particular the *goal/purpose* this decision/practice is intending to meet

### C- To-dos / Homework

To check a completed task, double-click on the check box. In the pop-up window, click on *checked* & hit *ok*.

<input type="checkbox"/>	Task	Intent / Goal / Notes	Date
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Check Box

Name:

Value:   Checked

Describe the task.

Add any notes, in particular *why* you want to do this task.

Enter the coaching date. Add the completion date if it is not done before the following session.

### D- Recap of Learnings, Discoveries and Breakthroughs

**Coaching #1 - Topic:** ←

Date:  
.  
.  
.

Fill in the date and the theme covered in the call. Add a summary in bullet points of what was meaningful for you.

**Off Week Taking Stock** ←

Date:  
.  
.  
.

Fill in the date of your Taking Stock that took place during the off-week. Add a summary of your reflections, progresses, and lack thereof...



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