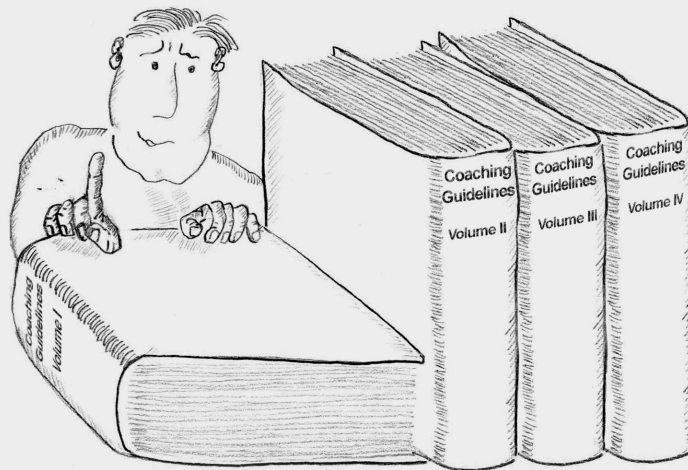




Learning
as Leadership

- Could I please have
the cliffs notes?



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 RHYTHM

In our experience, participants who 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 one-hour session every other week. See next page for detailed guidelines.

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.

Ongoing

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 identify where you have leverage and improve your approach to them by exploring how your ego might be limiting or misguiding your views and actions. 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 breakdown of the coaching session:

1. Prepare for the coaching call (5 min. prior to the call)
2. Coaching call with your LaL coach (45 min.)
3. Recap and anchor learnings from the call and email your RoadMap (see Appendix) to your coach (10 min.)

During each call, we will review a tool or concept from the LaL methodology and support you in applying it to different situations and challenges in your life.

PREPARE FOR 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 up/take out your notes and charts** (in particular your LaL ID card) so that you have them handy during the coaching call.



Reflect: What is currently on your mind?

- What topics are currently on my mind?
- What has happened in the last two weeks?

Review your notes from the last coaching call:

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?

DURING THE COACHING CALL (45 min.)



Typical sequence of the call

1. General Check-in	(5 min)
2. Review of last call	(5 min)
3. Today's Ego Tool	(30 min)
▪ Rapid review of the concept or counter-productive mechanism	
▪ How is this tool relevant and present in your life, AFIs and challenges	
4. Conclusion	(5 min)
▪ Summarize the main takeaways and learnings	
▪ Define experiments, practices and/or homework	

Bring what's most alive for you to the table

Use the coaching to address your most difficult or pressing issues. For that purpose:

- **Be transparent/vulnerable:** Track struggles and setbacks, or any situations where you feel you could use support, and bring them to the call.
- **Be truthful to your experience:** Express candidly what you are experiencing and struggling with vs. looking for the “right answer” to please your coach.
- **Make your coach good:** If you feel reactive or defensive to your coach's comment, first explore the ways in which it could be relevant / useful / true for you.

Whatever is going on for you, do not numb it or obsess silently about it. Put it on the table for discussion... in a learning space. Your coach is committed to being non-judgmental, helping you find the leverage in your ego, and, when necessary, mirroring back your behavior or holding you accountable to your goals.

Take comprehensive notes

We provide a Coaching RoadMap (word doc) as a template for this purpose. Go to your seminar chart link and download *Name-CoachingRM.doc*. Change the name of the file to reflect your name. Please refer to the appendix for further instructions.

AFTER THE COACHING CALL (10 min.)

Goal: Cognitively map, retain and own the learning and insights from the call.

- **Clean up your notes from the call**
- **Recap learnings (in the Coaching RoadMap)**
Complete the section “After End of the Call” then update the table of contents.
- **Please send your RoadMap to your coach within 48 hours.**

RULES AND REGULATIONS

COACHING SESSIONS INCLUDED IN YOUR PACKAGE?

Personal Mastery or Advanced Mastery include 3 follow-up coaching sessions. The 1-year program includes 14 coaching calls.

Additional coaching sessions may be purchased independently in certain cases.

Unused coaching sessions may be used up to 6 months after the purchase date or 9 months from the last seminar attended.

48-HOUR CANCELLATION POLICY

In consideration of our mutually busy schedules, our policy requires a minimum 48-hour notice to reschedule a coaching call and not lose it. This excludes emergencies.

For stand-alone seminars: 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 specific content you share with your coach is kept confidential within Learning as Leadership¹**, unless you and your coach reach a verbal agreement otherwise. However we do NOT consider confidential:

- **Attendance to your coaching calls.** We may inform your sponsor if you are not attending your sessions consistently.
- **Overall remarks.** To help a leader stay grounded in how his/her team is evolving, we may report to him/her any *themes* we have heard through different coaches and/or a general sense of how the team is progressing (keeping names and specifics confidential).

¹ We may discuss content internally in order to improve the effectiveness of our support to you.

APPENDIX - MANUAL TO YOUR ROADMAP

A- Prep the Coaching RoadMap document

First, rename the Word file to reflect your full name. Example: *Name-CoachingRM.doc* would become *JaneSmith-CoachingRM.doc*.

Also enter your name and your coach's name in the appropriate fields at the top of the first page.

Pro Tip: If you click on the page number of the coaching call you want to get to, in the table of content, on the first page, it will take you directly to that.

B- Take notes during and after your coaching call

Think about your agenda before the call

Your coach typically shares their agenda at the beginning of the call

Take as many notes as needed during the call

After the call, take a short moment to check-in with yourself

Give a summary title, fill in the date and capture bullet points of what was meaningful for you / homework / practices / ...

Click to return to the table of content

C- Update your table of content

Hover over the table of content and right-click (or control-click on a Mac). From the drop-down menu select "Update Field". In A dialog box pops up and select "Update entire table" and hit ok.



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