

VIP Coaching Charter

In today's fast-paced, high-stakes business environment, hiring the right coach can provide enormous benefit to you and your business. Here's what you can expect:

- a sounding board so you can explore alternatives
- an increase in motivation
- a higher degree of accountability
- a greater focus, greater clarity
- a clearer sense of direction
- to identify and enhance personal strengths
- to identify and eliminate/minimize weaknesses
- an increased effectiveness and confidence
- a higher level of organization and structure

Assessment

Assessments are the coach's x-ray machine to see what's going on.

Our first step is to validate your performance relevant strengths and soft-spots. We'll utilize a world-class assessment instrument (TAIS) as the basis of your performance development program. Other assessments may be administered to gauge where the GAPS in performance are, as well as complexity levels that inhibit progress. We also may administer assessments to the staff, which are extra fees that we can discuss should the need arise to assess them too.

Total Success Experience

We'll design and develop five *core areas* of your life: your health; your personal effectiveness; your relationships; your business; and your personal finances, in addition to the specific professional improvements we agree to address. My goal is to dramatically and rapidly improve each area, help you "pull it all together" by providing you a "Total Success Experience". Since your business is NOT your identity, we'll approach your situation as a measured whole, not just your business.

We'll be setting up a shared information storage system after the TAIS evaluation, to keep your assignments and work we do together organized online. You'll be given instructions and access

to our online workspace. Most of our work together is done by ongoing structured telephone sessions, web conferencing, and email. Routine coaching calls and web meeting formats are the most suitable modes of interaction to meet the deliverables and capabilities our coaching relationship will bring. You'll find our sessions convenient, dynamic, and relevant. *Face to face and staff development are extra projects with extra fees.*

You will give the coach and his unique process the time, mutual effort, and resources to flourish. This is why we begin with a minimum 6 month condition of engagement. Coaching isn't problem solving, it is a way of life to be interdependent on another. This stance in life leads to better quality collaboration to materialize your interests together as a permanent norm, which is vital and more intelligent. The longer you stay with it, the more powerful, valuable, rewarding, and inspiring your coaching relationship becomes for you.

Priorities, Habits and Schedules

On making coaching a priority, let's make sure we're crystal clear right out the gate. I'll make you a priority, and I expect you to do the same. You agree to make coaching a main event in your life, from which you get to all the important essentials, and abandon the non-essentials.

VIP coaching won't work if it's "one more thing" in your life, like another burden among many others. Coaching is not "among things" you do, it is *central* to things you do. This way, you'll get your money's worth.

We'll establish a regular call time and I expect you to call on time without exception. It reflects that you're dependable, a great investment, and reliably creative. You need to be someone the world can count on – who shows up, follows through, and shows respect if you're going to have open doors ahead, despite your current conditions, moodiness, feelings, or attitude. So please call on the hour we decide, not too early either, as another coaching call may be wrapping up before yours. If the receptionist picks up, please announce to her that you have a scheduled coaching call.

When we have a call scheduled, my expectation of you is that you will call. If something really vital comes up, you CAN change the appt., but I want 24 hours notice. This way, you don't create emergencies. If you skip a session without 24 hour notice, it's your responsibility, unless incapacitated. You're allowed one un-notified (unexcused) miss every 6 months, any additional will count as a paid completed session, unless it can be rescheduled by the coach within 2 days, at his convenience.

If you wish to reschedule a session, it is always encouraged to reschedule within 2 business days. If the coach needs to reschedule a session, it is his intention to do the same, or simply

move that session to the next call, and plan a makeup, to be handled accordingly, depending on the predetermined coaching plan and pay schedule. If we both find that the routine appt. time isn't working, then we'll change it to a time that will work.

There are to be no interruptions during our call. Total immersion is essential. I do not take emergency calls in the middle of our work session. And I expect you to do the same. So unless it's really burning, don't plan on being accessible to anyone. Get lost. Do not do a coaching session on a cell phone, unless we've agreed under special circumstances. Technology problems and out of range challenges can block the value of a great session. If you have to session by cell, please be in a routine location where the reception is good and you're not to be driving. If we find it to be disruptive, we'll attempt to pick a better time to connect by land line.

Logistics

We'll begin our work together in a predetermined series of time-bound coaching sessions, paid in full with a considerable discount (PIF—Paid in Full), or in equal monthly financing installments (MFA – Monthly Fee Arrangement). Paying in full is a nice option because once you pay, you tend to pay better attention to your coaching and put more into it, for better ROI. Our routine call time is at fixed intervals, structured by the coaching plan you've chosen for you.

Payment Parameters

About Paid in Full Arrangements

Packages paid in full can cover up to 6 month time periods of coaching, then we renew billing for the next period, and pro-rate any excused sessions you missed if you didn't make them up, or give a 30 day limit to make them up before your renewal. If the sessions/total time paid is used up before six months, we renew another series of sessions. You can convert to an MFA at that time if it appeals to you.

About Monthly Financing Arrangements

You can finance your coaching with a fixed monthly fee if it's more convenient for you. When you complete the expected number of monthly sessions in your plan within a 30 day billing period, the next installment is billed right then or as a default on the 30th day from the previous month's billing date automatically. You will not be invoiced, however we will send a pdf receipt if requested once billed. It is your responsibility to complete and use the time expected or number of sessions in your plan and makeup excused absences. You either use it, or lose it. You're allowed one excused absence or reschedule per month, unless the coach himself requests another reschedule.

The Bank System

In the unlikely event the coach (not the client) reschedules and delivers less sessions within the 30 day period than the expected number, we “bank” the session(s). (This does not apply for bi-weekly coaching plans, discounted fee arrangements or unexcused misses). We can add a session the following month or put it towards a longer session. You may also use your session(s) banked toward others in your organization who may want help. We don’t pro-rate the next bill, or delay billing to make up banked sessions. The monthly fee will continue as the same fixed amount each month. And if we elect to do more session time than your monthly installment covers in a 30 day period, we’ll invoice it additionally to you at the hourly rate in our fee plan if you have no sessions banked to cover it.

Cancellation Policy

Taking interest is not the same as *being committed* to the process. Program cancellations are not optional. There are none. Once a new 6 month billing period begins, you’re responsible for the total fees affiliated with that time-frame, even if you decide to not participate for whatever reason. We emphasize this so you take this as seriously as we do, and it also cultivates the level of self-reliance you come to enjoy in being more successful. If you decide to cop out, opt out early, for ANY reason, there are no refunds or pauses in payment schedules. You either “use it, or lose it” like a gym membership. We want serious people taking action in this program, not “tire-kickers” or “let’s see if this works” type of commitment.

There are no “breaks” on paid in full or monthly fee arrangements. Taking a 30-60 day hiatus isn’t allowed because it’s not likely you’ll pick back up your coaching, and subsequently will suffer losses of potential for change and momentum long term. You will be no less busy later than you are now. If for extreme conditions you must take a break, again, it is your financial responsibility to complete your coaching. Being overwhelmed and unable to get to your assignments and priorities due to a state of flux, groundlessness, unpredictable conditions, circumstances is why you have a coach in the first place to keep your rudder in the water, not a reason to cop out. One of the main reasons you hire a coach is be self-reliant, and create despite shifting conditions.

Quickies

“Quickies” are small help requests via email, outside our routine session times either replied by sudden email, webcam conferencing, or phone. Ongoing email support will be available and is the preferred mode of communication, however call support on an immediate need is available to you. Timing can be critical, so if an issue or opportunity surfaces that is time sensitive to get input on it, please expect immediate attention to it within 24 hours, and it may require a call be scheduled to devote 100% attention to the item(s). No quickies will be schedule on a Saturday

or Sunday, so if you prompt an email for a quickie over a weekend, it'll be retrieved on Monday. This is included, not extra, unless it becomes excessive. This will be up to your coach to assess and address this with you if it occurs.

Coaching Sessions

Please turn in assignments by 8pm the evening before our call, to be prepared. A consistent and intensive session structure will help us measure progress and relevant shifts in lieu of getting to your goals and objectives. Please be detailed in your week(s) in review, as it is the window in to what you're thinking and doing. We'll examine your wins, concerns, and new ideas at the onset of each call, then finesse assignments, then get to the "meat" – a pre-determined lesson plan structure the coach will introduce.

Our relationship is of "equal business stature" (**EBS**). That's how I see it, and that's how I INSIST you see it. Be direct with me in our conversations; don't hedge, don't equivocate, don't make qualifications.

No one becomes a black belt overnight! The success of the process is predicated upon your long-term consistency and commitment. Twenty four months is recommended, not required. Any discontinuation is mutually decided at the end of a six month performance period.

You're responsible for all results! The coach cannot play the game and win for you. In the professional sports world, the athlete is the performer. The coach critiques, gives input and direction, motivates and inspires, but the athlete performs. The results you get are your responsibility. You will complete assignments, clarify misunderstandings, give no excuses or cop-outs, take responsibility, create effective plans, and establish means for measurements. This way, the victories you share in each coaching session have you looking forward to impressing your coach; you can't wait to tell him how you did. Normal activity levels don't impress, your best work amazes your coach.

Your team will also be invited into our sessions from time to time. We'll be using our conference center to conduct group coaching calls when warranted. Your support staff will also be invited to your online workspace to coordinate with projects, assignments, tasks, and briefings to boost performance and follow our lead.

Our work together is totally confidential. Unless I receive your permission otherwise, it's nobody's business but ours! Our sessions are recorded, compressed and emailed to you upon your request, to review key input and practice. We do not archive these recordings, so do not ask for one more than 30 days prior.

Commitment and Interaction

We'll work together in a respectful and productive manner, as a powerful collaboration, like wingmen or climbing partners. Our communications will be direct and constructive, without sarcasm or negative attitudes. We'll be open and honest with each other. We'll resolve differences by listening, remaining calm and non-defensive, and being as clear as possible. You will not make excuses, play the blame or victim game, be a quitter, use cop-outs or any other type of immature, fear-based rackets. If we disagree we'll discuss it calmly with the intention of getting back on track and on the same page moving forward. You're expected to communicate any unease or disagreements in a timely, explorative and honest manner. If you do not understand why a tool or suggestion is being inserted, please ask why and help yourself understand the coach's foresight.

You will not make attempts to invalidate concepts and reject new ideas claiming "my business is different" or "my clients are different" or "I'm a special case" or "that isn't relevant or fitting my needs". You will apply the information you're given. That's where the real magic can exist for you ---is figuring out how to apply and implement. The difference between average income and financial independence is ----IMPLEMENTATION. Making the most of your coaching isn't about being full of answers or reasons, it's about being open, having all the questions, surrendering to the process of guidance and direction, and creating results.

The coach is not to become your client. This is important because the coach's value is in his objectivity and unbiased point of reference. The coach is not to be prompted for referrals into other coaching clients for alliances or solicitation of services. The coach may be used as a qualification reference to anyone predicting a coaching client's performance, such as a prospective customer, prospective alliance, or employer.

Strategic Distance

The value of coaching is in the distance between your coach, you, and your situation. The coaching relationship is not *quid pro quo*---a friendship which is based on mutual interests and equal exchange. The coach asserts his distance to keep objective; adhering to a teacher student collaboration that is professionally based. The client is to respect the value of this proximity by understanding the coach's policy to refrain from all "personal" invitations to evolve friendship, such as client social events, parties, birthdays, weddings, dinners, and leisure-centric encounters or non-business environments. Many professions favor the bonding brought on by such experiences, but the coaching relationship is sacred by virtue of distance and isolation from the client.

VIP Coach Roadmap

We'll increase your power in 3 areas: Getting Freed up, Creating more Value for others, and being On-Purpose. This means shifting the levels of Simplicity, Balance, Focus, Earning Power, and Confidence in life by changing your support system at home and work, relationships at home and work, and your habits, at home and work. We'll organize our work by 8 Essential Capacities (VIP Coach 8 Modules) in ensemble as a phase by phase Roadmap to mastery. The sequence of the capacities and the focusing strategies to drive them will be determined by you and your coach, looking at your long range plans and short range needs.

Your coaching program will begin with the "Life Architect" module, building a whole life game-plan, so your business can serve it, and managing your priorities can occur effectively. Our job is to line up your business to *create what you love* in life, and *love what you're doing*. Getting there is a gradual shaping process, as well as a program with definable starts and completion points. You'll notice many shifts in you, from your habits, to your thinking, to your quality of life. Usually, something in you is on the way out, while something else, still indistinct is awaiting you to come into being, as if you're crossing one territory to another.

The summit of our climb together is "Endless Growth Mastery", where you're radically, hyper-creative, and competitively immune to market downturns, by lining up creative freedom, creative value, and creative purpose (Radical Creativity Theory). Think of it like a zone of total confidence to reliably create that which matters so much to you.

The Main Deliverables are:

- A psychological scouting report with specific performance development targets (one target per month for the six-month term)
- A comprehensive inspirational and motivational 3 year vision map with itemized obstacles, strategies, and implementation plans.
- Short-term objectives.
- A toolkit of strategies, concepts and tools to increase productivity and quality of life.
- A set of structured business game plans, tools and systems to improve personal and professional performance, confidence, restore balance and freedom.
- Removal of all non-essentials that do not matter
- A focus on money making activity
- A greater amount of free time to recharge
- A sense of meaning and purpose that informs daily actions
- A business that you can scale and sell that serves your life, not a job that you own or owns you; prisoner of your own machine.

The success of our collaboration depends on your willingness and commitment. I have great confidence in my ability and capacity to move you faster and farther than you've ever done by yourself. I have a track record of consistent success and I'm very clear about my priorities. I love what I do and am totally dedicated to your complete success. Working together is a "can't miss" opportunity for us both.

Signed: _____

Date: _____

Signed: _____

Date: _____

