



January 4, 2010

Dear client,

I am looking forward to working with you as your coach. As an executive coach I am trained to assist you to identify, flesh out, and pursue your professional goals with greater effectiveness and efficiency. With an executive coach providing consistent, structured support, accountability and encouragement, you will have an opportunity to grow and accomplish more than you ever thought possible!

In this packet you'll find a number of items which are designed to help you understand coaching, become acquainted with the process that we will follow together, and prepare for the first appointment. These items include:

- Answers to Frequently Asked Questions about executive coaching
- The Benefits of an Executive Coaching Relationship
- A list of the important Characteristics of a Coaching Relationship
- A brief introduction to the Core Elements of a Coaching Session
- Exercises for preparing for the first coaching session
  - Reflection Questions
  - Professional Goals
- A brief bio
- A list of the standard Executive Coaching Packages available
- The Coaching Agreement

Please read through the packet thoroughly. In addition, please complete the exercises and send me a copy of your completed work by mail or email. Don't worry if you don't have answers to all of the questions. That is normal. And, feel free to send me an email or call me with any questions.

In addition to the contents of this packet you should find a copy of the book, "StrengthsFinder 2.0" and a journal. I will send you instructions regarding the book and an additional assessment tool in a separate email. The journal is a gift. I hope that you find it useful in this journey.

Joe Denner  
Alliant Leadership



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## INTRODUCTION TO EXECUTIVE COACHING

### Answers to Frequently Asked Questions

#### What Is Executive Coaching?

As an executive coach I partner with you in a growth-focused, thought-provoking and creative process that is designed to assist you in producing substantial, positive results in your personal and professional lives. I come alongside you by seeking to elicit solutions and strategies from you, believing that you are naturally creative and resourceful. My role is to provide support, encouragement and accountability to enhance the skills, resources, and creativity that you already possess.

#### Why Does Executive Coaching Work?

It is effective because of three unique features:

- **RELATIONSHIP:** The core strength of coaching comes from genuine trusting relationship. Clients often count their coach as one of their closest advocates.
- **COLLABORATION:** Client and coach become a powerful, synergistic team for pursuing change as they work together on the client's goals.
- **STRUCTURE:** Rarely does significant progress happen in an individual's life without a specific plan. The coaching relationship helps provide the support necessary to pursue goals in a truly systematic and focused way.

#### Who Works With an Executive Coach?

Individuals of all ages, stages of life and backgrounds can benefit from executive coaching. These can include leaders who are looking to take their performance to the next level, leaders who have recently been promoted, leaders who are new to the organization or leaders who are facing obstacles to achieving their peak performance. Whatever your situation may be, coaching provides an opportunity for meaningful growth and success.

#### What is the Focus?

Coaching works in any area of interest. In a successful coaching relationship, you set the agenda and I concentrate on keeping that the focus of all of our work together. We will work to identify your unique set of innate talents and strengths, acquired skills and knowledge and life experiences. These, along with the company's goals and objectives will provide the context for determining the most appropriate road map for achieving the desired growth outcome.

## INTRODUCTION TO EXECUTIVE COACHING

### Benefits of an Executive Coaching Relationship

1. **Ownership** – An executive coaching relationship breeds ownership because of the structure of the relationship. It is a relationship of equals that powers a process of learning and discovery for the client. “One of the most significant findings from adult learning research...is that when adults learn something naturally instead of ‘being taught,’ they are highly self-directing [i.e. they feel ownership and act on it]...What adults learn on their own initiative they learn more keenly and permanently than what they learn when being ‘taught.” (Malcom Knowles, *Designs for Adult Learning*, page 10)
2. **Motivation** – True motivation is the natural product of ownership. When a person decides what is most important to them and commits to action there is no need for outside motivation.
3. **Productivity** – One study has shown that organizations that provide coaching as a follow-up resource to training events (e.g. seminars, workshops) are four times as likely to meet their goals. Another study revealed that more than 3/4 of executives who had been trained in coaching reported better working relationships with their direct reports, and more than half reported improvement in productivity, team work, job satisfaction and conflict resolution. What would this kind of result be worth to your organization?
4. **Sustainability** – Coaching is not a cookie-cutter approach that leads to hit or miss results because of trying to make people what they are not. It is an approach that is based on the unique talents, strengths and acquired skills and knowledge of the person being coached. Therefore, the rate of success and the ability to repeat that success in the future with other individuals is much more reliable.

## INTRODUCTION TO EXECUTIVE COACHING

### Characteristics of a Coaching Relationship

#### Co-partnership between the Coach and the Client

- You and I are **equals** and are **mutually** involved in making the coaching relationship successful.
- I **come alongside** you with an attitude of serving your needs and agenda.

#### Personal Growth and Change is Affirmed

- **Safe** and **supportive** environment is created. **Honesty** is expected.
- I have a **genuine** concern for your client's success and well-being.
- I use **skillful** direct communication and feedback for the greatest **positive impact** for you.

#### Responsibility and Stewardship Belongs You

- I trust **you** to be **responsible for your own** goals and action steps created.
- You take responsibility to **follow-through** for your own decisions or action steps.

#### Believing the Best

- I genuinely believe in your **abilities**.
- I will **accept you** and take a non-judgmental stance toward you in the process.

#### Intentional Focus is on Your Distinct Design

- **Strengths** are championed.
- **Uniqueness** is respected.
- **Self-awareness** is encouraged.

#### Exploration/Discovery Encouraged through Active Listening and Powerful Questions

- **Safe** environment for exploration and discovery of new possibilities and avenues.
- **Support** and **affirmation** for new goals and behaviors helps you design actions.

#### Integrity, Authenticity, and Sincerity are Marks of the Relationship

- Coach demonstrates **integrity**, authenticity and sincerity.
- Coach keeps **commitments**.
- **Trust** is a central standard of the relationship.

## **INTRODUCTION TO COACHING**

### **Core Elements of a Coaching Session**

#### **Coaching Sessions**

##### **In Person or Via Phone**

Coaching sessions are typically conducted over the phone, however if both the coach and client are in the local vicinity in-person sessions may be arranged. The day prior to the coaching session, the client e-mails the coach a Prep Form which reviews accomplishments, action steps, and a proposed agenda for the session. To begin the session, the client calls in to the specified number at the time of the session.

After a few minutes of relational “catching up,” the client reviews the Prep Form with the coach and the action steps that he or she created at the previous session. Then the client will set the agenda for the remainder of the session. The coach keeps the conversation focused, helping the client reach the goal he or she sets for the session. The coaching conversation is a thought-provoking and creative process designed to inspire the client to maximize growth. The coach listens, observes, and customizes his or her approach to meet the client’s needs.

Between sessions, a client may call or email the coach per the coaching agreement that he or she has agreed to.

##### **Phone Etiquette Guidelines**

1. Calls are always made by the client to the coach. This is in harmony with the principle of the client taking responsibility for his or her own growth.
2. Call at the scheduled time agreed upon. Another session may be scheduled soon after your call.
3. Call from a place where you will be undistracted, and can have your notes in front of you.
4. Please do not call from a cell phone while driving in the car. Dead spots, intermittent connections, and driving distractions are not conducive to a good coaching experience.

##### **Rescheduling**

Honor the coaching relationship by making every attempt to hold rescheduling to a minimum. I will offer the same courtesy in return. Repeated rescheduling introduces disruption into the process that will hinder your ability to stay on track and achieve your goals.

## PREPARING FOR COACHING

*Getting ready for the first coaching session*

### REFLECTION QUESTIONS

Below are questions that you will find helpful to consider and complete for the first coaching session. Answer as fully as possible. Remember, if you cannot answer them all right now that is okay.

What motivates me personally and professionally?

In what area of my life do I want to see significant progress?

Time and money aside, what would I rather be doing? What energizes me?

What consumes my time that does not benefit me and my growth?

How do I define a really great day?

What opportunities in my life do I see right now?

Where do I want to be in five years?



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## PREPARING FOR COACHING

*Getting ready for the first coaching session*

### GOALS

What are you expecting to accomplish in the next (go as far out as you would like):

30 days:

90 days:

180 days:

1 year:

2 years:

5 years:

What are your most important goals and why are they important:

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_



### Joe Denner Bio

Before becoming a professional coach I spent over 15 years working in mid-level and executive leadership positions within companies as well as in the church. My extensive experience in finance, accounting, operations and human resources brings to any individual or organization a wealth of knowledge relating to the development of human capital for positive, profitable and sustainable growth.

In my most recent position with MetroGroup I was the Vice President of Operations for our Glendale Heights plant. I was responsible for overseeing all of the operational functions, including Production, Quality, Fulfillment, Materials Management, Mailing, Project Management, Maintenance and Safety. Our plant produced over 100 million first class mail pieces each year. My team was very proud of our 99% quality and 99% on-time delivery record.

As a professional coach I provide executive coaching, leadership training and organizational development services to leaders to help them get more of what they want and less of what they don't. I am a certified Myers-Briggs administrator and trained in the use of the Gallup StrengthsFinder assessment. My goal is to partner with leaders to increase their own personal effectiveness and efficiency as well as assisting them in creating transformational, sustainable leadership development within their culture.

I enjoy the process of equipping others, as well as seeing them reach their goals and potential. It gives me great satisfaction to see others grow and develop as individuals and as leaders of significant influence.

Here is a recent testimonial: *"Without hesitation I recommend Joe as a coach. He partnered with me as I transitioned into a new executive role and has continued with me during some particularly challenging times. I am no stranger to coaching and yet it has been both enjoyable and refreshing to interact with Joe. He allows me to set both the immediate and long-term agendas and then keeps me on track, helping to maximize my productivity and engagement in my mission. He has helped me cut through some of the clutter in life and areas of professional responsibilities in order that I may hone in on those activities that are both crucial and critical. He is especially skilled at reminding me of what I have told him is most important to me. His consistency in pointing out areas where I am improving as well as those areas that I must put at the top of my list keeps me on track with my goals and agenda."* I would count it a privilege to work with you to produce these same kinds of results for you and your organization.

My wife Andrea and I, and our eight children, reside in Wheaton, Illinois.

## Coaching Agreement

*I'm looking forward to partnering with you as you pursue significant growth! As your coach, I want to help you grow, change, develop, and achieve your professional goals. While I may sometimes challenge you toward higher achievement, our relationship starts with your agenda, your values and your initiative. You are responsible for your career, and you will make the choices about what actions to take and which areas we will work on together.*

Following are a few guidelines to make our working relationship as productive as possible. If you have any questions, please call or e-mail me before we begin our coaching sessions.

### **Growth Goals**

I will provide support, encouragement, accountability, perspective, and resources for you as you pursue your goals. We will create a developmental plan including regular action steps, which you are committing to carry out. Since a significant part of our sessions will center on these action steps, I may choose to cancel or reschedule our session if you have not followed-through.

### **Scheduling**

We agree to be diligent and to be punctual for our meetings so we can make the most of our time together. We will try not to cancel or reschedule out of respect for each other's schedules. If it is necessary to reschedule, we will give one another at least 24 hours notice. If you miss a session, it is your responsibility to initiate contact and reschedule.

### **Extra time**

You are encouraged to contact me between scheduled sessions by e-mail, or 'spot calls' (~5 minutes or so in length) with questions, struggles, thoughts, accomplishments, or just to touch base. I enjoy delivering this extra level of service and the extra contact will be beneficial for you.

### **Confidentiality**

All coaching conversations are strictly confidential. Further, unless you choose to tell others that you are being coached, this information remains confidential.

### **Compensation**

Compensation for coaching services is due on a monthly basis, before coaching begins. Monthly invoices will be generated on the 25<sup>th</sup> of the month for the next month's services. Credit card charges, if applicable, will be processed on the 1<sup>st</sup> business day of the month. The <<TBD>> coaching package, with <<TBD>> sessions per month, has been selected at a rate of <<TBD>> per month.

### **Termination and Refunds**

Either of us can terminate the coach-client relationship at any time. If we do, we will give each other one week's notice. Any portion of payments for services that have not been rendered will be refunded.

It usually works best for both of us to bring some kind of closure to the relationship, so if you would like to end the relationship, let's talk about it. If there is a misunderstanding, or you are dissatisfied with something, please bring it up and I'll work with you to resolve any difficulties.



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### Guarantees

It is imperative for you to apply yourself if coaching is to be successful. Our work will sometimes be very purposeful, goal-directed, and dependent on you doing some specific outside work. Other times it will be very broad in scope, requiring time in reflection. Your real growth will come from the processing and steps you take in the time between our calls. I do not have all the answers you are looking for, but I will walk faithfully with you as you pursue the answers. My desire for you is that this will be a pivotal time in your life!

**Please complete, sign where indicated and return to me.**

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_  
\_\_\_\_\_

**Daytime Phone:** \_\_\_\_\_

**Evening Phone:** \_\_\_\_\_

**Cell Phone:** \_\_\_\_\_

**Fax:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

**Website:** \_\_\_\_\_

### Credit Card Payment information:

Name as it appears on card: \_\_\_\_\_

Credit Card number: \_\_\_\_\_ Exp. Date \_\_\_\_\_

Security Code: \_\_\_\_\_ Card Type: VISA/MasterCard/Discover (Circle one)

I confirm that I have read the guidelines listed in the Coaching Agreement and agree to abide by them. As a coaching client, I understand and agree that I am fully responsible for my well-being during my time of coaching, including my choices and decisions. No guarantees have been made to me as to the expected outcome of my coaching. I am aware that I can choose to discontinue coaching at any time. I recognize that coaching is not psychotherapy and that professional referrals will be given if it appears they are needed.

**Client Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Coach Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_