



FOR PROFESSIONAL COACHES

# THE COACH'S FIELD GUIDE

FOR YOUR **1ST SIX MONTHS**  
WORKING WITH A CLIENT™

[BECOMEABUSINESSCOACH.COM](http://BECOMEABUSINESSCOACH.COM)

A [BUSINESSCOACH.COM](http://BUSINESSCOACH.COM) COMPANY

(916) 922-7766 | 2025 HURLEY WAY STE. 111

SACRAMENTO, CA 95825

Since 1989 we have Pioneered the Professional Business Coaching Industry and have Certified Business Coaches in the US, Canada, Mexico, China, Japan, and 34 other countries with the BusinessCoach.com Methodology.





# AN OVERVIEW OF YOUR FIRST SIX MONTHS

## WORKING WITH A CLIENT



1

### WELCOME TO THE WORLD OF COACHING

The coach and the client begin their relationship, and evaluate what's not working, and together they determine what's next and create an Action Plan to move forward.



2

### DEFINING A CULTURE OF ACCOUNTABILITY

The coach and client establish the company vision and mission, and work with key staff to identify benchmarks for the next 6-12 months.



3

### DEVELOPING THE LEADERSHIP AND TEAM

The coach meets with leadership and key personnel to begin leadership development. The coach and client work on creating a highly productive and motivating work culture.



4

### THE ACCOUNTABILITY INCREASES

The coach and the client work together to establish a culture of accountability.



5

### DEFINING THE GOALS AND INDIVIDUAL ROLES

The coach uses the All Company Survey to further clarify organizational structure and the employees' roles.



6

### ESTABLISHING TRACTION AND MOMENTUM

The coach and client evaluate survey feedback to identify what's working, what's not working, and what's missing. Together, they strategize the next steps moving forward.



## MONTH 1 FOCUS

The coach and the client begin their relationship, and evaluate what's not working, and together they determine what's next and create an Action Plan to move forward.

# MONTH 1

## WELCOME TO THE WORLD OF COACHING

### THE COACH'S CHECKLIST

- The coach facilitates an inquiry into the present reality in the company. This is a detailed look at where the business is currently. We utilize a questionnaire to guide the leader through the process of evaluating their company.
- The coach facilitates an inquiry into "What do you want?" The leader answers this essential question required to understand the leaders' vision. This helps the coach understand what a win looks like for them, and gets to the heart of what they really have been afraid to reach for in their company. It will also indicate what goals haven't been achieved and helps them implement new goals.
- The coach picks up the Profit and Loss Statements for the previous 12 months. The coach doesn't need to be an accountant. Profit and Loss Statements serve as a scoreboard to track their company results from month to month going forward.
- The coach has the organization's leader start reading the first important book from the Client Reading Assignment List. Providing a list of different reading assignments help the leaders get better at business and at understanding the benefits of personal and leadership transformation.
- The coach works with the leader to identify the key people in the organization and introduce them to the coaching process. (This is a positive conversation about the importance of having someone from the outside support the vision, mission, goals and future of the company.
- The coach starts a list of new projects (we call this an Action Plan) that are a record of the most important projects and prioritize them in the order of importance.
- The coach helps the client outline the vision, mission and core values of the company.

“

**Impossible is just a big word thrown around by small men who find it easier to live in the world they've been given, rather than to explore the power they have to change it.**

**- Muhammad Ali**





## MONTH 2 FOCUS

The coach and client establish the company vision and mission, and work with key staff to identify benchmarks for the next 6-12 months.

# MONTH 2

## DEFINING A CULTURE OF ACCOUNTABILITY

### THE COACH'S CHECKLIST

- The coach helps the client develop the company vision, mission and company commitments. This usually takes several weeks to complete and is not done by committee. This essential process works best if the leader of the organization leads their senior management in a team project to define the character and direction of the organization going forward.
- The leader finishes reading the first book (reading assignment) and orders book number two.
- The coach facilitates conversations with senior leaders to identify the next tier of management personnel.
- The leader reads one full chapter in the Coach's Playbook (can be purchased at [BecomeABusinessCoach.com](http://BecomeABusinessCoach.com)). The coach assigns the appropriate chapter based on the leader's needs.
- The coach reviews the Profit and Loss statements with the organization's leader. The coach and the leader set up key indicators in order to keep score moving forward.
- Together the coach and the client identify benchmarks that the organization will achieve during the next 6 to 12 months.
- The coach and the leaders begin defining, tracking & forecasting stats (key performance indicators).

“

**Coaches create an environment where their clients can be the best that they can be.**

**- Coach Gary**



## MONTH 3 FOCUS

The coach meets with leadership and key personnel to begin leadership development. The coach and client work on creating a highly productive and motivating work culture.

# MONTH 3

## DEVELOPING THE LEADERSHIP AND TEAM

### THE COACH'S CHECKLIST

- The coach attends and helps facilitate the first "All Company Meeting" to introduce the Business Coaching Process, as well as the new vision, mission, and company commitments.
- The coach reinforces the importance of using the word "commitment" and modeling it inside the culture of the organization.
- The coach and leadership team introduce new company goals to the entire organization.
- The coach interviews 2nd level managers about the culture, the employees and their role inside the company.
- The coach reviews everyone's Job Descriptions, making sure the standards of performance are in place. (There's a template provided for Job Descriptions in the Coach's Playbook).
- The coach conducts leadership training meetings with V.P. level management. (Several Training outlines are available in the Coach's Playbook.)
- If needed, the coach introduces Profiles and Assessments as business coaching tools.
- The coach and the leadership team begin the conversation to design a 12 month Strategic Plan.
- The leader reads one more chapter in the Coach's Playbook and orders one new book (from the Client Required Reading List).
- The coach works with the client to discuss the possibility of a management retreat.

**“Anybody who thinks they are a leader and doesn't have anybody following them is just out for a walk.**

**- John Maxwell**



## MONTH 4 FOCUS

The coach and the client work together to establish a culture of accountability.

# MONTH 4

## THE ACCOUNTABILITY INCREASES

### THE COACH'S CHECKLIST

- The coach attends and helps facilitate the second all company meeting.
- The coach introduces the All Employee Company Survey to the leadership team to be completed at the next all company meeting. This will help the coach and the leadership team understand the attitude and commitment of the employees.
- The coach helps facilitate regular monthly meetings with the leadership team.
- Coach attends individual department meetings (in some cases). Oftentimes meetings last for too long and end without an outcome. This is where coaching becomes powerful and the coach can help the management team become more effective in managing their time.
- The coach and client begin developing the organization's University Program. (optional).
- The coach facilitates a senior management retreat (optional). Most organizations miss out on this highly productive opportunity. Leading the senior management team in a 2-day planning retreat can produce extraordinary results and new possibilities for the future. The result is often a plan for the next 12 months.
- The leader reads one more chapter in the Coach's Playbook and one new book from the Client Required Reading List.

“

**It's what you learn  
after you know it all  
that counts.**

**- John Wooden**



## MONTH 5 FOCUS

The coach uses the All Company Survey to further clarify organizational structure and the employees' roles.

# MONTH 5

## DEFINING THE GOALS AND INDIVIDUAL ROLES

### THE COACH'S CHECKLIST

- During months five and six, the coach should have the relationship moving along in a healthy direction. If the relationship is solid, the coach can begin to spend less time with the client and require them to step up the pace and learn to delegate to their subordinates.
- The coach attends and helps facilitate the third All Company Meeting. The coach introduces the All Company Survey to the employees. (Afterward, the survey is turned in to the coach. The coach produces a report for client outlining results of the Survey without disclosing participant names and individual's comments).
- The coach attends monthly meetings with leaders and VP level personnel.
- The coach attends department meetings, if necessary
- Continue development of the organization's University Program if the company chooses to go this route for training.
- The organization's leader reads one more chapter in the Coach's Playbook and one new book from the Client Required Reading List

“

**Our business in life is not to get ahead of others, but to get ahead of ourselves; to break our own records, to outstrip yesterday by our today.**

**- Stewart B. Johnson**





## MONTH 6 FOCUS

The coach and client evaluate survey feedback to identify what's working, what's not working, and what's missing. Together, they strategize the next steps moving forward.

# MONTH 6

## ESTABLISHING TRACTION AND MOMENTUM

### THE COACH'S CHECKLIST

- The coach and client discuss the results of the All Company Survey and determine what's next utilizing the information from the coach's findings and final report.
- The coach attends and helps facilitate the fourth All Company Meeting.
- The coach attends monthly meetings with leaders and VP level personnel.
- The coach attends and helps facilitate individual department meetings (optional).
- The coach helps develop the organization's University Program (optional).
- The coach and client evaluate the Coaching Process: What's working, what's not working, what's missing, and what's next? This can be an opportunity to re-evaluate the goals and do a reset if need be.
- The leader reads one more chapter in the Coach's Playbook and one new book (from the Client Required Reading List).

“

**It's lonely at the top. 99% of people in the world are convinced they CAN NOT do great things, so they aim for mediocre.**

**- Tim Ferriss**

**AFTER SIX MONTHS, EVALUATE THE CLIENT'S RESULTS TO DETERMINE WHAT'S NEXT. BE SURE TO CELEBRATE THEIR SUCCESSES, AND THEN REPEAT THIS PROCESS IF NEEDED.**



# CLIENT READING ASSIGNMENT LIST

BELOW ARE RECOMMENDED READING FOR CLIENTS TO FURTHER DEVELOP AS BUSINESS OWNERS AND LEADERS. EACH SECTION EQUALS ABOUT 1-2 MONTHS OF READING ASSIGNMENTS.

## READING SECTION 1

- **The Dream Giver:** Bruce Wilkson
- **16x Real Simple Innovation for 16 Times Better Results:** Richard Koch
- **The One Minute Manager Balances Work and Life:** Kenneth Blanchard
- **The Five Dysfunctions of a Team:** Patrick Lencioni

## READING SECTION 2

- **Influencer:** Patterson, Grenny, Maxfield, McMillan & Switzler
- **What Got You Here, Won't Get You There:** Marshall Goldsmith
- **Leadership and the Art of Self Deception:** The Arbinger Institute
- **Secrets of the Millionaire Mind:** T. Harv Eker

## READING SECTION 3

- **The Four Disciplines of Execution (audio only):** Stephen R. Covey
- **The Power of Story:** Jim Loehr

## READING SECTION 4

- **Raving Fans:** Ken Blanchard
- **The Thin Book Of Trust:** Charles Feltman

## READING SECTION 5

- **The Richest Man in Babylon:** George S. Clason
- **The Hands-off Manager:** Chandler/Black
- **The Advantage:** Patrick Lencioni

## READING SECTION 6

- **Building a Story Brand:** Donald Miller
- **Onboarding: How to get New Employees up to Speed:** Bradt & Vonnegut

## READING SECTION 7

- **Crucial Accountability:** Patterson, Grenny, Maxfield, McMillan & Switzler
- **Me, Myself, My Team:** Angus McLeod
- **The Fred Factor- How Passion in your Work and Life can Turn the Ordinary into the Extraordinary:** Mark Sanborn

## ADDITIONAL READING

- **The Four Hour Work Week:** Timothy Ferris
- **The Three Laws of Performance:** Steven Zafron, Dave Logan
- **Little Red Book of Selling:** Jeffery H. Gitomer
- **Built to Last:** James C. Collins & Jerry I. Porras
- **The Canoe Theory:** Hibbard, Hibbard & Stockman
- **Don't Worry Make Money:** Richard Carlson
- **E-Myth:** Michael E. Gerber
- **Execution: The Discipline of Getting Things Done:** Larry Bossidy, Ram Charan, and Charles Burck
- **Fish!:** Stephen C. Lundin
- **Getting Into Your Customers' Head:** Kevin Davis
- **Guerrilla Marketing Attack:** Jay Levinson
- **Hire With Your Head:** Lou Adler
- **How to Master the Art of Selling:** Tom Hopkins
- **Straight Line Leadership:** Dusan Djukich
- **Innovation and Entrepreneurship:** Peter E. Drucker
- **Promoting Yourself:** Hal Lancaster
- **Prospecting Your Way to Success in Sales:** Bill Good
- **Self Matters:** Dr. Phil McGraw
- **Selling to Vito:** Anthony Parinello
- **Seven Habits of Highly Effective People:** Stephen R. Covey
- **Smart Moves for People in Charge:** Deep & Sessman
- **The Big Book of Business Games:** John Newstrom & Edward Scannell
- **The Deming Management Method:** Mary Walton
- **The Goal:** Eliyahu M. Goldratt & Jeff Cox
- **The Inner Game of Work:** W. Timothy Gallwey
- **The Knight in Rusty Armor:** Robert Fisher
- **The One Minute Salesman:** Kenneth Blanchard
- **The Secret of Questioned-Based Selling:** Somer Sresser
- **The Wisdom of Wolves:** Twynam L. Towery
- **Thriving on Chaos:** Tom Peters
- **Who Moved my Cheese:** Dr. Spencer Johnson
- **Principle Centered Leadership:** Stephen R. Covey
- **Endless Referrals:** Bob Burg
- **Good to Great:** James Collins & Jerry I. Porras
- **The 21 Irrefutable Laws of Leadership:** John C. Maxwell
- **Aligned Action The Key to CEO Effectiveness:** Ron Wilde