



LISK ASSOCIATES, LLC

RTC Executive Coaching Outline and Proposal

Provided For:

ABC Company
(Logo Here)

January 1, 2020

Thanks again for the opportunity to provide a proposal regarding one-on-one executive coaching and development within your organization we call “RTC Executive”. The goal of this proposal is to provide you with a framework and solution that meets your needs exactly. If anything in the proposal needs to change, if something is missing, or if there are items in the proposal that are not of value, please let me know and we will be happy to make the necessary adjustments to this proposal.

RTC Executive Coaching Objectives

Definition of a coach: Someone who helps take you from where you are today to where you want to go. The term “coaching” refers to the term we use to describe the process. RTC stands for RealTime Coaching. RTC Executive Coaching believes in Win-Win-Win; a win for the executive coachee, a win for the executive coachee’s team, and a win for the executive coachee’s organization.

Rules of Engagement

- The coachee does not exhibit “clinical” behavior that would require the services of a licensed therapist or psychologist. The service we provide is limited to working with clinically normal people to improve their effectiveness on the job.
- The employee to be coached is considered “a keeper” by the organization. That is, we are not just “checking the box” with someone that has already been targeted to be released from the organization.
- The coachee has already been informed of the purpose of the coaching.
- The coachee sees executive coaching as a “perk” vs. a “punishment” and is at least somewhat willing to work on improving their behavior at work. We believe RTC Executive is not just a program but a competitive advantage.
- The coachee is ultimately responsible for making their own personal objectives, key results, plan, decisions, and choices.
- The coachee must willingly complete requested assignments. All assignments used are for job-related skills/key results only.

Confidentiality

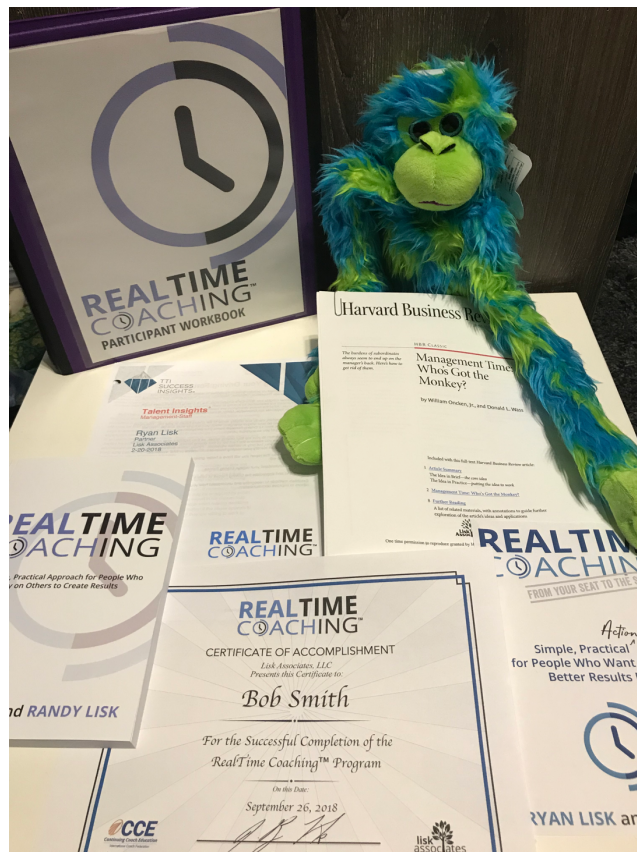
Confidentiality is vital to the executive coaching process. All personal confidential data and other organizational information given directly to Lisk Associates by either the executive or the organization will be held in confidence. Reports back to the organization will contain organization and job-related progress reports. Personal information will remain confidential as long as it does not violate any laws or endanger any person’s personal safety. We shall protect such information from examination by anyone other than our employees or agents. Lisk Associates shall assume responsibility for the confidentiality of such information while the information is in its hands.

The RTC Executive Coaching Approach

The RTC Executive coaching process is based on the RealTime Coaching model of inquiry vs. assumptions. The coach helps you vs. judges you. While the model is the same for all coaching processes, the individual wants and needs of the executive are all unique.

Things we will use during the process:

- RealTime Coaching: Lisk & Lisk
- RealTime Coaching Participant Workbook: Lisk Associates, LLC
- RealTime Coaching: From Your Seat to the Street: Lisk & Lisk



The model consists of the following four basic questions, known as WDIP:

- W=What do you want?
- D=What are you doing?
- I=Is what you're doing getting you what you want?
- P=What is your plan?

All coaching and changes of behavior stem from some variation of these four questions.

Things we may measure during the process:

- Natural behavioral style
- Driving Forces
- A job's key results/accountabilities, traits, talents, and competencies
- Acumen, competencies, and/or EQ

Things we may do during the process:

- Live 360 assessment.
- Sit in on your meetings.
- Live interview your peers, direct reports, manager, and others.

Engagement

We will conduct 12 regular engagements with the employee. Each engagement will last approximately one hour. Approximately 50% of each meeting's time will be invested on coachee's current issues and 50% will be spent on coachee's self-awareness and professional development. Once approved, the person being coached and Lisk Associates will establish meeting times and locations convenient for both of us.

Lisk Associates agrees to meet with the employee's manager at least three times: Once prior to the first engagement, once with a "halftime" progress report, and a wrap-up at the end of the 12th formal engagement.

We will provide additional coaching with the executive in-between sessions on an "as-needed" basis.

The entire process will last approximately 6 months with regular meetings being held approximately every 2 weeks.

Sample Agenda

Understanding all executive coaching sessions are custom, here is a sample agenda with potential topics:

Prior to Meet #1: “CoachMatch”: Coachee selects their coach. Coachee will be asked to complete a complimentary Talent Insights report and will be matched to the top three potential RTC-certified executive coaches. Coachee interviews all 3 candidates and makes their selection.

Stakeholder(s) are requested for behavioral shifts, improvements, changes, and challenges for the coachee to be addressed during the coaching.

Meet #1: “Getting to know you/me”

RTC Concept: Intro to RTC, Objectives, Coaching Overview,
If after meet #1, either the coach or coachee wish to terminate the relationship they may do so with no questions and no invoice.

Meet #2: Quick-start. 1-Pagers

RTC Concepts: Change Model, Behavioral Shifts and Coaching Readiness.

Meet #3: Let’s Coach, Your Coaching Mindset & Building Trust.

RTC Concept: RTC P. 12-13 + From You Seat to the Street

Meet #4: RTC Revealed

RTC Concept: Awareness & Inquiry vs. Assumptions

Meet #5: Ongoing Coaching

RTC Concept: Loose ends, WDIP

Meet #6: What is your plan?

RTC Concept: Overcome your resistance to coaching, Prep for RTC conversation

Half-time progress check with stakeholder.

Meet #7: Ongoing Coaching

RTC Concept: Loose ends

Meet #8: What do you Want? Part 1

RTC Concept: Driving Forces

Meet #9: Ongoing Coaching

RTC Concept: What do you want? Part 2 - Conflict

Meet #10: What are you Doing? Part 1: Results
RTC Concept: Doing = Action = Results (AAR)

Meet #11: What are you Doing? Part 2: HOW
RTC Concept: Behavioral Styles

Meet #12: Wrap-up, review, evaluation of results, next steps.
RTC Concept: Coachee teach-back

After meet #12: Final wrap-up and synopsis sent to organization and executive's sponsor.

The coachee should expect regular "homework" assignments we call "From Your Seat to the Street" to complete in-between sessions. Individual homework will be no more than 1 hour.

Investment/Return on Investment

Investment	
Professional Coaching/Leadership Development Engagement, All inclusive of materials, books, and assessments	\$3,750/employee
Travel Expenses	Billed at cost

Payment is due within 30 days of receipt of invoice. Lisk Associates will invoice organization after completion of meet #1 and the coachee agrees to the process (unless otherwise arranged with the organization).

Return on Investment (ROI) for Executive Coaching

There are several ways to determine ROI for executive coaching. Below are some examples, you may have others to add to this list. The formula to determine ROI is: $(\text{Revenue Gained} - \text{Cost}) / \text{Cost}$. ROI is generally expressed as a percentage or as a factor of "X times cost". Cost is the easy part of the equation. It's the revenue gained which is more difficult. Here are some ROI thought starters.

Skill development: Assume coachee makes \$80,000/year

Assume the coachee becomes 5% more effective from new skills learned = \$4,000.

Assume that their improved performance affects four other people on their staff, each making \$40,000 and their skill development increases 1% = \$1,600.

Examples of skills: Self-awareness of perception/style, awareness of others' style and how to more effectively communicate and motivate. Confidence to handle an issue they

have never been trained for. Proactively handling problems. Asking “one more question”.

Turnover:

A. If the leader had a team member that was about to quit making \$40,000/year and it cost the organization \$30,000 to replace them, but they stayed.

B. If the leader being coached was about to leave, “I quit, just haven’t told you yet” decides to stay based on the organization’s investment in executive coaching and making \$80,000/year. The cost to replace that executive could be 2-5 times annual salary, or \$160,000-\$400,000.

Or, what could it be worth to effectively coach someone out of the organization?

Selection:

Less time reading resumes, asking better behavioral-based interview questions, avoiding a poor hire, increasing chances for an excellent hire, intentionally identifying what skills, traits, talents, and competencies are needed for a specific job.

Time To Effectiveness: TTE measures how long it takes a new hire to get up to speed enough to realize a return on your organization's investment in this person. What is your current hire's time to effectiveness? In my opinion, using Talent Insights as part of onboarding and measuring "fit to job", "fit to manager", and "fit to team" improves overall time to effectiveness by 60 days. At \$40,000/year salary, two months reduction in time to effectiveness could return \$8,000 back to your organization.

Engagement, Morale, & Culture: Assume this executive’s staff of 4 making \$40,000/year becomes 5% more engaged and effective, increasing morale or culture, that’s worth \$8,000.

Guarantees

The effectiveness of an executive coaching process is highly dependent on the relationship between the coach and coachee. Results will vary with each independent coaching agreement. If Lisk Associates does not provide the services they agreed to, there is no charge for those services.

Next Steps

If this proposal meets your needs the next steps are:

1. Approve the executive coaching engagement with an electronic approval via email to ryan@liskassociates.com
2. Organization ensures all rules of engagement are met and employee's manager is positively committed to this process, willing to support and provide the necessary resources as needed.
3. Calendar a meeting with key stakeholders of the executive and establish organizational "wants".
4. Executive's sponsor meets with executive about coaching opportunity. If executive is ready, sponsor sends me executive's contact information and I am then responsible for starting the coaching process.

Lisk Associates appreciates this opportunity to provide our executive coaching services to your organization.

J. Ryan Lisk
Partner
Lisk Associates, LLC
January 1, 2020