

### A note from Jeff...

I'm writing to let you know about an exciting arena that has been a developmental course for me in working with people toward the goal of achieving the kind of life they really want to be living!

Over the past twenty-five years, the relationship that people have with their work has gone through enormous change. Booming technological advances and a global economic market have provided opportunities that could not have been imagined only a generation ago. Entrepreneurial endeavors have sky rocketed and people are defining themselves less by their job titles and more by who they are; recognizing that transferability of skills, and resilience in how we look at our careers, is the recipe for success in the 21st Century! As the marketplace shifts and changes, more and more people are recognizing that they need to be self reliant and often self defining in creating their life's work.

There isn't a person I know, who is not effected by these changes. I can't tell you how many times a day I talk with people who are attempting to deal with the increased demands of their work. Coupled with the challenges of living some semblance of life that integrates work with families and overall personal values. I hear these issues from friends and colleagues just as frequently as I do from my clients!

Over many years, I've devoted my time to the discovery of different models that work for my clients (not to mention myself!). This shift in my own career enables me to leverage my best skills and talents, help others, and bring a heightened sense of fulfillment into my own life. For the last ten years, I've been involved in rapidly growing arena that fits the bill for me in all of these areas! It's called **Coaching**. Various types of coaching exist, sometimes categorized by industry or type of client and sometimes described by different terms, you may have read or heard about "Life Coaches", "Success Coaches", "Personal Coaches", "Executive Coaches" and "Corporate Coaches".

During this time period, I have accumulated more that two thousand hours of coaching experience working with all types of executives, professionals, entrepreneurs and people transitioning from one aspect of work or life to another. While I have maintained a small therapy practice and still enjoy that, I find that Coaching is the modality for transformation that is most effective for the vast majority of people who are motivated and already successful. If you'd like to consider hiring me as a coach, please review the website and contact me.

Jeffrey F. Spar, Ph.D.

Welcome! I appreciate and honor the opportunity to work with you as your coach and I am excited about the journey that you are about to start. I have prepared the following materials to layout a blueprint for how a coaching relationship works which will help you to anticipate how we will work together.

For **COACHING** to work most effectively two factors are present. 1) The client is willing to grow, and 2) there is a gap between where they are now and where they want to be. Remember, in the old days, a coach was a noun and it referred to the vehicle that took a person from where they are to where they wanted to go. Essentially, that is what we will be doing. With these two elements, that is all that is necessary for a coach and client to identify and solve problems, create a new life, turn a business around, and/or design and implement a plan of action.

## **WITH ME AS YOUR COACH YOU WILL HAVE THE OPPORTUNITY TO:**

**Take more, better and smarter actions:** Because you set the goals you really want. Finding out exactly what you really want for yourself is our first task together. I help you distinguish between what you "shoulda", "coulda", "oughta" and "have-to" want from what you really want for yourself. Once you create the ideal goal you're much more likely to naturally and consistently take action to reach it!

**Have a balanced and integrated life which works well:** Because you design it SELFishly. Having it ALL means starting with, creating a balanced life. We'll put a new spin on the word selfish, in our sense, it's not a dirty word, it's not egotistical; but without taking really good care of yourself, it's hard to be loving, caring and responsive to the people you are attempting to relate and connect with. We'll look at ways to be Self-ish, yet responsible. How to get your needs met and still have people like you! You'll love building your foundation because you know you're worth it!

**Reach for more, much more:** And not to be consumed in the process. When anyone has a partner they trust, they will always reach for much more because they can afford to. That's what I am to you!

**Make better decisions for yourself.** Because your focus is clear. Every single client of mine is smart, but not always focused. I will help you become more focused as you share ideas with me – someone who understands you. Someone who is subjective enough to want a lot for you, yet objective enough not to be biased or self-serving.

**Have more sustainable energy:** No more starting and stopping. When you're happy, productive and free from tolerations and problems, you're going to feel better!

### **How I Coach Clients:**

Every Professional Coach has their own style of coaching clients; I thought it would be important for you to understand my style, what I expect from my clients and what they can expect of me:

#### **I Expect Your Best**

If you are hiring me, then you are probably ready to do and be your best. And if you aren't doing your best, I will ask you to do so. If you can't do that at the moment, I will understand and do what is necessary for you to feel heard, acknowledged and helped back onto your path.

#### **I Make Direct Requests**

From time to time, I will make a direct request like, "Will you accomplish X by the end of the month?" You may accept the request, counter offer (negotiate the action) or decline. Requests help to keep you in action and moving toward your goals.

#### **I Will Invite You to Explore Options**

If I feel sure about something and you're open to it, I will open options to explore ways to handle a problem or "go for" an opportunity. If I am not sure, I will say so. Honesty is one of my values. I am straight and expect the same from you. Regardless, use the best of what I say and use your own judgment.

#### **I'll Have "Difficult" Conversations With You**

When I notice a funny tone in your voice, or hear something amiss, I will ask you about it. Often, it may be these small moments, which offer the chance to resolve something. However, I will not confront or push, I will merely invite you to look at something.

#### **I'll Ask That you Define Tasks**

I'll usually ask that my clients come up with two or three goals, actions or breakthroughs to accomplish between one week and the next. If it's too much, say so, if it's not enough than together we can define more.

### **You Are Expected to Use Me Not Depend On Me**

As your coach, I am a resource and a presence for you to use to your best advantage. I have an almost unlimited amount of support, compassion, forgiveness, and strength for you and we can use this to help you get in touch with your direction and vision. AND, I ask that my clients use me as the resource and friend that I am, but not to let themselves get into the position of needing me (or coaching) as a dependency or fix.

### **I Am Here**

I want to hear it all. If you have a personal problem, are upset with something (even me or coaching), are just starting to realize something big, can't wait to share a breakthrough, I want to hear about it.

## **Client Policies and Procedures**

I am really looking forward to coaching you to accomplish exactly what you REALLY want.

On a business note, I want you to be familiar with my policies and procedures. If you have any questions, just ask at our next session, or e-mail me.

### **FEE**

Your fee for three (3) monthly sessions is \_\_\_ payable to Jeffrey F. Spar and should be received by the first of each month at 9485 Sunset Drive Suite A222, Miami, Florida 33173.

Timeliness is a standard that I value. Your payments should be made on time unless prior arrangements have been made. If you are having a challenge, just let me know.

### **PROCEDURE**

Call me at (305) 279-0333 or (305) 254-8228 for our scheduled sessions, unless otherwise arranged. You may also e-mail me anytime at [JeffTHP@aol.com](mailto:JeffTHP@aol.com), and I will respond as soon as I can within 24 hours.

### **CHANGES**

I would appreciate you trying not to reschedule calls, however if it is essential that you do so, please give me 24 hours notice. If you must cancel a call, and do so within 24-hours, we will make it up to have three calls during that month. There may be a time that I am forced to reschedule a call as well, but I will let you know as far in advance as possible.

### **CHALLENGES**

If I ever say or do something that doesn't feel right, please bring it up. I promise to do whatever is necessary to have you be satisfied. We will work on all things like this as a team. I value your truth and expect you to tell me if I overstep.

## Request

I request that you get access to e-mail if you do not already have it. Our work will be much more expedient and direct if you have it.

Well, that is basically it.

If there is anything I haven't covered in your welcome materials, just ask.

Here is a list of questions I would like you to address. Please take some time to answer them and e-mail the answers back a couple of days before our first session. Thanks.

1. Where do you get your energy?
2. Where are you most irresponsible?
3. What is the gift that you have that you'd feel great about orienting your life around?
4. Why have you engaged my services?
5. What are the five changes for you to make in a week in order to get you off to a good start?
6. How might you sabotage our professional relationship?
7. What motivates you?
8. How willing are you to make substantial changes?
9. How will you know if our work has been effective?
10. How can I best coach you?
11. Do you understand that I stand for YOU, not your goals?
12. What are the business opportunities you are not availing yourself of, at this time?
13. What consumes your time that does not contribute to your present or future?
14. What are you addicted to?

15. Should you be in therapy and be resolving something?
16. What gets you excited or lit up; tells you that you are alive?
17. What is your lifelong dream, that's worth living, starting now?
18. How strong is your Personal Foundation?
19. What percentage of the life you are leading is actually YOUR life?
20. How much profit do you think your business should be making?

## HOW TO WORK WITH ME AND YOUR FIRST "TO DO" LIST

1.) Make a list of what you really want in life. Coaching works best when you have clear goals, which are based on your needs and values. If you are not sure what your goals/needs might be, we can discuss them during your next session.

2.) Keep focused on your Clean Sweep Program. (Included in this package under Assessments). The Clean Sweep program is an essential element in a strong personal foundation and all my clients work this program. As soon as you can complete and fax the results of this 100 question questionnaire. Start handling at least one item per week. The ultimate goal is a score of 90!

3.) Get to know yourself. Working with an empathic and sensitive coach is a healthy way to grow. Most people hire a coach to accomplish several specific goals and much of the focus and time spent is on these goals. Yet, with coaching don't be surprised if you discover new parts of yourself or finding your goals adjusting themselves to who you really are. This discovery process is natural; so you needn't rush it, just realize it will likely happen. There are several assessment programs that you'll be working on that will directly help this process. Feel free to discuss this with me when you wish. I deal with the whole person.

4.) Double your level of willingness. Part of working with me as your coach is that I will ask a lot of you. Not too much I hope, but certainly more than you might have been asked recently. I need you to be willing to experiment with fresh approaches and to be open to redesign the parts of your life that you are able to right now. This, so you can more easily reach your goals and live an integrated and fulfilled personal and professional life, using the gifts you have and enjoying life as it was meant to be enjoyed. I'm going to need you to be able to do the following:

- Change your behavior
- Experiment and try new things
- Remove the sources of stress in your life
- Redesign how you spend your time
- Set goals that are much, much bigger
- Start treating people much, much better
- Reevaluate the assumptions/decisions you've made
- Start telling the absolute truth
- Eradicate all triggers of adrenalin
- Get the support you need to handle a problem
- Raise your personal standards to be very, very high
- Stop tolerating or suffering about your life



5.) Come to the coaching call/session prepared with an agenda. We have a set amount of time together and you will want to use the Client Prep Form: a written list of things you want to share and discuss. This form includes things like:

- success and wins you had during the course of the previous week
- problems you've faced and how you handled them
- what you're currently working on and how it's going
- "aha's" and insights and new awareness, which excite you
- report on the homework you've completed.
- guidance you want from me.
- new skills you want to develop

6.) Enjoy our sessions. We do have to work together, but please enjoy the sessions with me. After several sessions you may find that we take a little time to catch up on those portions of your life that mean a lot to you; or you may want to share something personal and confidential. And after several months (probably sooner), you may find that we laugh a lot during the session-at life, how you've grown, how things happen. Coaching sessions are serious, but that doesn't mean they're not enjoyable, for both of us. That doesn't mean they have to be intense, exploring the possibilities of your life can be exciting! But feel free to set the tone and I will respect what you need in this area.

7.) Keep yourself well between our sessions. Coaching can require energy. Emotionally, intellectually and physically. Given this, I want you to take extraordinary care of your well being while being coached and always. Only you know what this looks like, but I suggest you go much further than you ever have in this regard. Develop a list of Ten Terrific Daily Habits, which keep you well. They will and need to change overtime. Here are a few examples to trigger your thoughts:

- Exercise: walking, yoga, running, martial arts whatever you enjoy.
- Reading
- Listen to great music
- Write in your journal
- Start being early for everything
- Handle a completion (work on finishing something that you've started, that has been in limbo).
- Under promise
- Meditate
- Create something tangible
- Eat healthy

Add anything to the list that works for you. Make yourself a promise to do these things for your SELF.

8.) Do your homework each week. This is not homework like school. These are tasks, actions, results or changes that you are telling yourself and me that you will do your best to complete by the next session. You must apply yourself and use your homework to help you achieve your personal and professional goals.

9.) Please write a personal biography. Make sure you include the following:

1. A thumbnail description of your life to date.
2. What is your passion in life? What makes you the happiest or most fulfilled.
3. What is your life purpose? What do you want for yourself, others and your life? What is truly most important to you?
4. Your business mission-what do you want professionally? Why do you do what you do? What do you offer that is unique and/or excites you?
5. Your Legacy? What do you want to leave for others after you are gone? Be specific.

Well, that is just a start!!! It's a lot to begin with, but all of this work will help you facilitate your personal and professional growth as time goes on. The more you REALLY know about yourself, the clearer your path to personal fulfillment and success. Have fun with this!

I look forward to the journey we are embarking upon together!

### Coaching Agreement

Please fill in this 2-page form, sign and date it. Then fax or mail a copy to Dr. Jeff Spar.

Date: \_\_\_\_\_

Client Name: \_\_\_\_\_

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

Type of Sessions (Check): Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

Session Starting Date: \_\_\_\_\_

Session Day: \_\_\_\_\_

Session Time: \_\_\_\_\_

Initial Coaching Term: \_\_\_\_\_

Fee: \_\_\_\_\_

**Coaching Agreement Page 2**

Client and Coach agree to abide by the Coaching Policies and Procedures as listed on the policies.pdf document.

Coach Disclaimer of Liability: Client hereby employs Jeffrey F. Spar as coach for the purpose of advising and counseling Client with respect to Clients' business and personal development, interpersonal relationships and setting and achieving the Client's goals. Jeffrey F. Spar has experience in these matters and agrees to render such coaching services. Client understands and Jeffrey F. Spar agrees that he is not an employment agent, a business manager, a financial analyst or, acting in this capacity as a psychologist or psychotherapist, and that he has not promised, shall not be obligated to and will not (1) procure or attempt to procure any employment, business or sales for the Client; (2) perform any business management functions such as accounting services, tax or investment consulting, or advise with regard thereto; or (3) in this capacity act as a therapist, provide psychological counseling, psychoanalysis or behavioral therapy.

Above agreed by \_\_\_\_\_

on (date) \_\_\_\_\_

and by \_\_\_\_\_  
Jeffrey F. Spar

on (date) \_\_\_\_\_

DR. JEFF SPAR  COACHING

**Please fill out this form and fax, or e-mail it to me before the first session.**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone (home) \_\_\_\_\_

(office) \_\_\_\_\_

Fax Number \_\_\_\_\_

E-mail Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Employment (employer, location, job, title, length of time)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Brief Description of Job and/or Business

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Client information-Page 2**

Formal Education (schools, degrees, study concentrations)

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Informal Education (non-degree programs)

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Marital Status \_\_\_\_\_

Number of Children \_\_\_\_\_

Names and Ages \_\_\_\_\_

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List your Top Five Strengths

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

**Client information-3**

List Five Weaknesses

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

List Your Five Top Skills

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

List the Five Accomplishments of Which You are Most Proud

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

**Client Information form-Page 4**

List Three Short Term Goals You Would Like to Work on During the Next Month

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List Three Longer Term Goals You Would Like to Work on During the Next Three Months

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List Ten Things You Are Tolerating (Putting Up With) That You Really Don't Want or Need in Your Life

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_



**CLIENT PREP FORM**

Please fax or e-mail this form to me at least 48 hours before our next scheduled session:

WHAT I HAVE ACCOMPLISHED SINCE OUR LAST MEETING:

WHAT I DIDN'T GET DONE BUT INTENDED TO:

THE CHALLENGES AND PROBLEMS I AM FACING NOW:

THE OPPORTUNITIES THAT ARE AVAILABLE TO ME RIGHT NOW:

I'D LIKE TO USE OUR NEXT SESSION TO:

WHAT I'M GRATEFUL FOR THIS WEEK:

## The Center for Executive & Corporate Development

**Coaching:** The process that boosts you to the next level!

**Designed for:** Executives, Professionals, Physicians and Health Care Professionals, Entrepreneurs, Managers, Creatives, Personal and Career Transitions.

### About Dr. Jeff Spar

- Jeffrey F. Spar is Director of Coaching Services at The Center for Executive and Corporate Development. He is a Personal/ Executive/ Business Coach, psychologist, speaker, columnist and consultant.
- 29 years experience as a successful private practitioner in psychology dealing specifically in areas of communication, relationships and work.
- Affiliate of the Pyramid Resource Group, Research Triangle Park, North Carolina. Working with senior coaches as part of a team in major corporations throughout the United States and around the world.
- Affiliate of The Physicians Leadership Group an organization designed to provide coaching services for Physicians and Health Care Professionals dealing with leadership and career alternatives with this population.
- Site Director for The Highlands Program™, Miami, Florida — a nationally offered life and career development program which formally assesses the natural abilities of individuals. Clients define an individual blueprint that guides them through a process to define work that best fits their abilities.
- Consultant to businesses and organizations in conducting job studies; objectively defining the nature of positions using benchmark criteria assessments. Assists employers in making more accurate hiring judgments. Use of 360' competency based feedback instruments to develop more effective work cultures and teams.
- Specialized training in coaching to enhance these specific skills, participated in an international coach training institute, which is recognized as the premiere educational source of its kind.
- Frequently invited speaker at professional and organizational events dealing with the issue of work, relationships and lifestyle management.

- Consultant to media in areas related to work, family and effecting balance between the two. Appeared on numerous radio, television and news broadcasts in programs dealing with these and related subjects.
- Member of International Coach Federation.
- Past President of the Florida Association of Marriage and Family Therapy.

### **What is Coaching?**

A profession that has synthesized principles from psychology, business, communication, mentoring, counseling, consultant, sports, transformation and finance.

I will help you formulate a personal definition for "success" in life.

I'll encourage you achieve greater integration of personal and professional life.

I'll provide the tools, structure and support to orient focus toward your true values and purpose.

I will definitely ask you to do more than anyone has ever asked you to do, including yourself!

### **Why does Coaching work?**

It focuses on the most important parts of you ... your needs, values, goals and vision.

It offers a confidential and objective setting. For executives, confiding in co-workers can be risky; family or friends have their own agenda and need to see you as the system defines you. Top executives are often isolated. A Coach responds solely to you and your needs. .

Coaching focuses on the present and your trajectory into the future.

Coaches are people in whom you can always confide; they'll give straight answers.

A relationship, in which you can be truthful to yourself, provides a foundation for results.

### **What do Coaches do?**

As your coach I will listen a lot to what is being said and what is not being said. I establish a collaborative partnership with you, to create solutions and develop strategies for success.

I ask laser sharp questions. I actually assume that **you** know the answers and my role is to help you bring them up to the surface. I will keep the focus on your values and goals. I will support you — both in facing obstacles in reaching your goals as well as attaining them.

### **Who works with a Coach?**

- CEO's/Executives
- Physicians and Health Care Professionals
- Professionals
- Creatives
- Corporate Managers
- Entrepreneurs
- People in Personal and Career Transitions
- Those wanting to develop Emotional Intelligence

### **What is the structure of Coaching relationship?**

- Most coaching is done via the phone, making coaching internationally accessible.
- Coaching sessions occur three times per month.
- Regularly scheduled thirty minutes sessions (can be adjusted according to clients need).
- Communication between session via e-mail and or fax.
- Client has a monthly investment in coaching, plus the expense of phone calls.

### What is the next step?

- Most people who benefit from coaching instinctively see it as a process that can help them.
- I have specific criteria for clients I am best able to coach.
- We discuss if we would be an appropriate match.
- If I'm not the right coach for you, right now, I have access to a huge coaching community and can refer you to someone who is.
- If we are a match, I send you an introductory packet with some information gathering tools, assessments and together we begin to move you to where you want to go.
- Call me, I'll be happy to answer any questions about what coaching is or isn't.