

OUTLINE FOR EXECUTIVE COACHING WITH JON FRANK, MBA, JD

WELCOME

And thank you for entrusting your coaching journey to me.

Below are some thoughts that I like to share with new clients, laying out how I've come to approach our Executive Coaching engagement together. Let's start with some basic definitions. You are the coaching Client, I am the Coach, and often there is an organization that acts as a Client's Sponsor. For C-level executives, there is typically no sponsor, or perhaps it is the Board of Directors. These designations are important in terms of **boundaries, clarity and confidentiality**.

CONFIDENTIALITY

Generally speaking, everything that we discuss will be confidential. However, there are two exceptions. First, for those Clients with a Sponsor, our FRAMEWORK will likely be open for them to see: our schedule, what assessments we're eyeing, etc. You might also consider this to be our administrative process. Secondly, since your Sponsor is paying for the coaching, your general coaching GOALS will likely be visible to them, as well.

But how we get there is 100% confidential. In fact, everything else— results of assessment tests, 360 Survey results and feedback, etc.— all of that is private. Hopefully, this (along with some good coaching on my part) will create trust for all three of us (Coach, Client, and Sponsor). Trust is the engine that will drive our executive coaching forward. And obviously if you do not have a sponsor, then there are no confidentiality issues at all.

TIME COMMITMENT

Typically, I meet with clients two or three times monthly via one-hour Zoom sessions, for a period of roughly six months. For most clients, this process is extremely satisfying, and enjoyable. But it's something that clients need to invest their energy into deeply— change will only happen if it's prioritized.

PROCESS AND ASSESSMENTS

Early in our work together, we may use assessment tools such as the EQ-i 2.0 Emotional Intelligence Assessment, Adam Grant's Give and Take quiz, a Grit Scale Inventory, as well as proprietary questionnaires my team has developed. Your results are completely private—shared only between you and me. These assessments can be highly revealing, highlighting both strengths and weaknesses. Understanding both is essential for meaningful growth.

Around the two-month mark, where appropriate, we may consider introducing a customized 360 assessment. As you likely know, 360's are commonly used in business/corporate settings. This involves confidential interviews with five to seven people who work closely with you. I handle these conversations discreetly, aggregate the input, and provide you with an anonymized summary. No individual comments are ever attributed, and I am transparent with you about what is— and is not— shared. By this stage, coaching goals often shift from initial felt needs to what I call negotiated goals. From there, we translate those insights into a clear, actionable plan.

COACHING DEVELOPMENT PLAN

Together we will co-create a Coaching Development Plan. Often, I write the first draft. This is a summary of your coaching to date, assessments, 360 Feedback and early coaching goals. You have final edit of your Coaching Development Plan, but I can also make recommendations about what you should include. In instances where your engagement has been sponsored by your company, we will present the Coaching Development Plan to your boss, and we'll do it together.

But ultimately, **YOU** are the owner of your coaching. I can't stress that enough. The more you own it, the more you get out of it.

OUR FIRST SESSION

Let's briefly discuss what will actually happen during our first session. When we meet, I'll want to talk about the reasons we're doing coaching. What are some of your pain points at work? What's worked for you, and what has not? Does this mirror any patterns outside work? The more self-awareness you have now and throughout your coaching, the less stuck we may become when facing the tougher moments, when they arise.

Having led my own companies for nearly 20 years, I understand how easy it is to feel stuck at the top. As your coach, I focus on inspiration, recognition, and developing your authentic strengths. If I've learned one thing, it's that lasting success as a leader must be rooted in who you truly are. Your ultimate challenge is to blend your authentic—and often best—self with your role as leader. The goal isn't to copy others' approaches or "smooth out the rough edges." It's to help you become the strongest and most authentic version of yourself. After all, that's the one thing no one else can bring.

I'm looking forward to seeing you soon.

Let's go.