ACTIVATE180

COACHING PROGRAM PLAYBOOK

CONTENTS

OUR PURPOSE

We are driven by supporting others to lead with authenticity and elevate all areas of their lives. In helping people create lives fueled by passion and intention, we show them what is possible.

GUIDING PRINCIPLES

- We put people and our community first.
- We empower and excite.
- We stand for happiness and fulfillment.
- We never settle.
- We dare to dream big.

Activate 180
2 Venture, Suite 100
Irvine, CA 92618

ACTIVATE 180 LEADERSHIP

With 20+ years in the people business, we know what we're talking about.

ROD McDERMOTT
CEO + FOUNDER

Founder of a global executive search firm that has partnered with many world-class companies.

ZACH SMITH
CO-FOUNDER +
CHIEF ACTIVATION OFFICER

Former Corporate Executive turned Business Coach who works with companies and individuals to align their purpose and passion.

BENEFITS OF BEING AN ACTIVATE 180 COACH

COACH ENRICHMENT

- Learn the Activate 180 Coaching Methodology
- Experience working with progressive companies
- Gain referenceable experience, which will help you build your coaching practice
- Participate in monthly coach growth workshops for continued learning and development
- We provide materials and guidance throughout the coaching process

COACH COMMUNITY

- You will be part of a growing coach community
- Share AND LEARN best practices and coaching techniques with other skilled coaches
- You'll have full support from the Activate 180 team to guide and help you become a successful coach

FLEXIBLE SCHEDULE

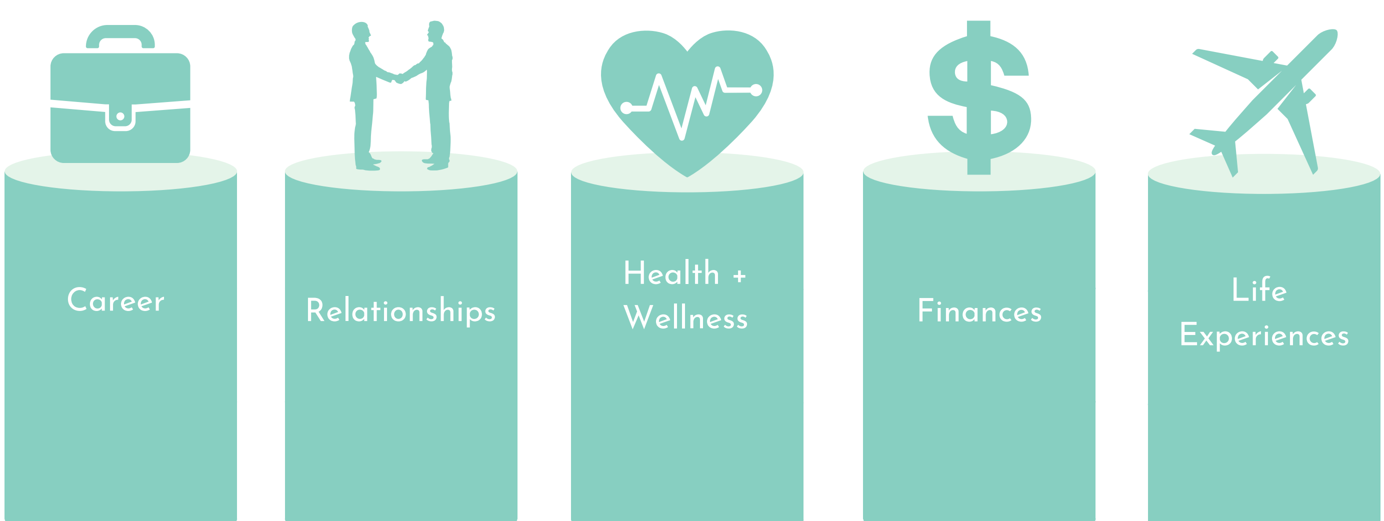
- You have the ability to work from wherever you choose and schedule your hours based on mutual availability
- Encouraged and supported to build your own coaching business while working for Activate 180

ATTRIBUTES OF AN ACTIVATE 180 COACH

- Compassionate and empathetic
- Active, incisive listener
- Forthright and honest
- Background as a leader or manager in a corporate setting
- Observant, open and non-judgemental
- Communicates with directness and clarity
- Professional conduct and elevated standards
- Integrity with their word and behaviors
- Self aware and emotionally intelligent
- Understands human dynamics
- Able to build trust and establish healthy client relationships
- Passionate about wellness

WHEN PEOPLE FEEL LIKE THEY HAVE FULFILLMENT IN LIFE, THEY SHOW UP STRONGER AT WORK.

Our well-rounded approach to career coaching ensures that all of these areas are thriving:



COACHING STANDARDS

- Adhere to coaching video call guidelines and coaching policies
- Client communications are professional, clear, and succinct (follow general templates + communication formats provided)
- Coach will respectfully review the coaching agreements and agree upon the protocols with their client at the start of the coaching relationship
- Communications between coach and client should remain relevant to the coaching session topics and scheduling only
- You may provide your clients with resources from the Activate 180 repository only. If you want to use any additional or outside materials, vendors, resources, etc. not within the approved list please reach out to us! We love to add to our library.

COACHING AGREEMENTS

FOR CLIENTS

- 1:1 Coaching Session Cancellation: Clients must provide 24-hour notice to cancel their coaching session. Please do your best to be accommodating and provide some grace the first time this happens.

- Reschedule/No Show: Clients will forfeit, except in times of emergency, the specific coaching session if client does not show up to the agreed session without rescheduling 24 hours before the start time or any communication beforehand.

FOR COACHES

- Call Renegotiation Policy for the Coach: Please cancel or reschedule coaching sessions with your client at least 48 hours before a scheduled coaching call. If it's an emergency, please cancel with your client as soon as possible. Please try and avoid reschedules with the client as much as possible to create consistency.

- Lateness: Do your best to accommodate late arrivals. If you have a hard stop please let your client know as soon as possible, otherwise we encourage you to complete the entire session time.
    - It is up to the coach to be flexible if the client texts, emails, or contacts you to renegotiate the start time. E.g.: client texts you early in the day, “Hey Coach, can we push back 30 minutes today?”. Or the client lets you know they will be 15 minutes late, you may then decide to shorten the session and still end at the designated time.

    - Whatever you decide must be communicated to the client at the time of the negotiation (this will avoid any awkwardness during coaching, and you won’t waste valuable coach-time).

FOR COACHES CONTINUED

- No Response to email outreach: Coach will provide up to 2 communications to meet with the client and arrange a coaching session. If there is no response for over one week after the second email/text/call, please let us know!

- Return Message Policy: If your client(s) leave you a message (e-mail, voicemail, text), please respond within 1 business day during general business hours: Monday-Friday, 8 am - 6 pm. Please aim for a same-day response whenever possible.

- Privacy/Confidentiality: Coaches agree to honor the IP/Copyright© of all Activate 180 Coaching materials and will not use this outside of this program.

- Coaches are prohibited from coaching their Activate 180 clients outside of the company.

- The coach and client relationship must remain in a professional and corporate relationship, and there is a strict no dating policy. This includes dating and/or romantic involvement.

- Coach will use the Activate 180 provided Coach Notes template to take client notes during each session. This is essential to staying organized and we will ask that you turn these notes in to Activate 180 (with client's permission) if a coach transition takes place.

- Coach will create an out of office message on their Activate 180 account if they are away for a set period of time.

- Coach will give Activate 180 at least 30 days notice prior to departure.

- If it’s not a “good fit”: If it just doesn’t feel like there’s synergy or you don’t think that you will be able to serve your client's highest aspirations, then please notify your Activate 180 Team Lead to be reassigned.

- Client Dissatisfaction: If there is ever a time where a client expresses their dissatisfaction, or they verbalize that they have been offended, or if they present a complaint of any kind to the coach; please express your apologies in the moment, and advise the client that a member from the Activate 180 team will reach out to them directly to address the concern. As the coach, please allow them to end the call and please do not try to defend the issue.

COACHING CODE OF ETHICS

The Coaching Code of Ethics serves to uphold the integrity of the Corporate Coaching Program and the global coaching profession by setting standards of conduct consistent with Activate 180's mission, values, and guiding principles.

Professional Conduct at Large

The coach must accurately disclose their coaching qualifications, expertise, experience, training, certifications, and credentials. They should recognize and respect the efforts and contributions of others and only claim ownership of their own material.

Conflicts of Interest

The coach must be conscious of any conflict or potential conflict of interest, openly disclose any such conflict, and offer to remove themselves if a conflict arises.

Professional Conduct with Clients

They must also respect the client(s)'s right to end the coaching relationship at any point during the process, subject to the agreement, and encourage the client(s) to make a change if they believe the client(s) would be better served by another coach.

Confidentiality and Privacy

The coach must have a clear agreement about how coaching information will be exchanged between themselves and their client(s), and maintain the strictest levels of confidentiality with all client information unless release is required by law.

If a manager asks about an employee being coached, you may not disclose content discussed unless otherwise approved by client. You may discuss the employee's attendance and overall engagement.

TIME COMMITMENT

As an Activate 180 coach and as part of our continued training and development plan, we strongly encourage you to participate in the below. AKA if you want to elevate your coaching game, this is how!

<u>Guided Workshop</u>
One 60-minute team experiential workshop per month per company, led by a Master Coach. The expectation is to attend each workshop theme at least once to understand the context so you can integrate into your coaching sessions.

<u>Company Strategy Call</u>
One 30-minute session per month per company for coaches to put on their consulting hats and discuss trends and overall themes seen in coaching sessions, gain coaching support from the Activate 180 team, and connect with your coaching team.

<u>Personalized Coaching Call</u>
One or two 60-minute calls per month per client.

Number of coaching sessions per month is dependent on the prior arrangement made with each company.

BILLABLE HOURS

Activate 180 will compensate you for your one-on-one coaching sessions. Company strategy calls and workshops are value adds for continued learning and development and not billable.

NEW CLIENTS

Once assigned a new Activate 180 client, send your first client outreach email within the first 24 hours (following our template on page 12).

Within 5 days of client assignment, you should have your first Activate 180 client meetings confirmed, all meeting/group training sessions blocked within your calendar, and be ready for a successful start with our program.

SCHEDULING

Use your Calendly link to book your first coaching session. At the end of your first session, please choose a day and time that you can set up a recurring calendar invite with your client. This recurring calendar invite can be created through your Outlook account and meetings scheduled via Microsoft Teams. Calendly should only be used after the first session to book reschedules. We follow this process to help make your life easy!

Click HERE to get more details on how to schedule a recurring Teams meeting via Outlook.

EMAIL COMMUNICATION

Use your @activate180.com email address for all client communication. Your email signature is automatically set up and can be seen by the client when an email is sent. Please note, when starting a new email your email signature will be hidden. Yeah, we're magical like that. There's no required action on your end.

CLIENT CONTACT
EMAIL INTRODUCTION TEMPLATE

Email Subject: [Company Name] Coaching Program — Hello from Coach (Your first name)

Email Body:

Hi (First Name),

My name is (Your Name), and I'm excited to introduce myself as your coach for the (Company Name) Coaching Program. (Insert 2-3 sentences about where you're located/from, about your coaching/professional background...etc.)

Below is my Calendly Link, where you can book our first 1-hour call.

Insert Calendly link here

Please let me know if you have any questions. I look forward to meeting you very soon. Thank you for your commitment.

Kind regards,
(Your Name)

COACHING VIDEO CALL GUIDELINES

- LOG IN/CALL ON TIME
- DRESS IN BUSINESS CASUAL ATTIRE
- KEEP A CLEAN AND ORGANIZED BACKGROUND
- NO FILTERS OR VIRTUAL BACKGROUNDS
- TAKE NOTES, AND REMIND CLIENT(S) OF NOTE TAKING
- LIMIT DISTRACTIONS AND BACKGROUND NOISE
- PREPARE MATERIALS IN ADVANCE

BUSINESS CASUAL ATTIRE + BACKGROUNDS

Business casual tops include:

- Blouses
- Button-down shirts
- Sweaters
- Polo shirts
- Cardigan

What not to wear:

- Strapless shirts
- Low-cut tops
- Sweatshirts or hoodies
- Inappropriate logos or text
- Wrinkled clothing
- Athletic/Sports wear

Background Expectations:

- Keep it simple
    - Solid background without distractions
- Declutter
    - Remove any unnecessary items or furniture in your Zoom frame
- Tidy Up
    - Clean up your space and keep it organized

Other suggestions:

- Hang wall art
- Add a plant (even if it's fake this can make a difference)
- Brighten up your space with extra lighting
- Try not to show a bed in the background

VIDEO / PHONE SESSIONS

All introductory 1-on-1 sessions will be held on Teams. After your initial session, please allow the client to decide if they'd like to continue with phone or video calls. This is a co-creation, so if you find that you are much more effective as a coach on video than the phone, or vice versa, and they are indifferent on what they prefer, feel free to be in the discussion with them around what you feel can make for the most impactful experience.

*With the phone call option, please ensure clients are present during sessions. We do not recommend clients taking sessions in a space where they are not able to fully drop in (driving, going on a walk, doing other tasks, etc). This is something to create an agreement around up front so expectations are fully clear for sessions and everyone is aligned.

SESSION 1

GUIDELINES + FRAMEWORK

SESSION 1 GUIDELINE | CLARITY

This is a 1-hour call in which you will be getting to know this individual and understand who they are, where they've been and what they are looking to create in their life and career.

Coaching Session Guidance

- About Yourself — Tell the client a little bit about yourself (where you're from, your background, why you're a coach, family, hobbies, etc).

- Know Their Story — Have them share their life story, so you can get some background on who they are and where they've been. Get inside their world, what are the beauties and challenges within it.

- Create the Foundation
    - Previous Coaching Experience - Ask if your client has received coaching before. If so, what was their experience? If not, what's their understanding of coaching?
    - Commitments — What they can expect from you (i.e. total presence, support, feedback, pushing them outside their comfort zone, will have their back etc).
    - Expectations — That you expect them to show up on time, with total presence, and with an open mind. They should have a notebook and pen to take notes. Reinforce the importance of their commitment to the sessions as well as the growth work in between, that their results will be a direct reflection of it.
    - Confidentiality — Everything discussed between you will be kept confidential unless decided otherwise between the two of you.
    - Requests — Ask if they have any requests or questions about the coaching journey.

- Go through the 5 Pillars (career, finances, relationships, life experiences, health/wellness)
    - We must understand:
        - Their envisioned future
        - Their current situation
        - What they hold most meaningful (values + priorities)
    - Have them give a current 1-10 rating on each pillar, then have them define:
        - What's working
        - What's not working
        - What a level 10 looks like
        - What would it take to get them to 10?

You can finish the pillars in session 2, if there's not enough time in session 1. Remember that your client's process of self-discovery is a continuous work in progress and you will want to revisit these elements again in the future.

- Integration

Suggested Growth Work —
- Set SMART Goals to accomplish before the next session
- Ask them how they will ensure that they can be accountable to complete the goals
- Explore with them what could potentially get in the way of them completing the goal and what they can do to circumvent that

S: Specific | M: Measurable | A: Attainable | R: Relevant | T: Time-based

- Scheduling
    - At the end of your first session, please choose a day and time that you can set up a recurring calendar invite with your client. Click HERE to get more details on how to schedule a recurring Teams meeting via Outlook.

- For Future Sessions
    - Encourage your client to keep track of things they'd like to work on in-between sessions, however, you should also have an agenda for each call based on past sessions, recent work, and their goals.

COACHING CONTINUITY + HOW TO CREATE A SUCCESSFUL COACHING RELATIONSHIP

During your first session and throughout your time with the client, try to refer to the coaching journey as a process (work in progress), whereby your client evolves and so does their vision, idea of success, values and priorities. You, as the coach, are the agent of that change and evolution, a mirror that supports your client in seeing the patterns and drawing the key life lessons as they move on.

Throughout your coaching journey with the client, you may want to highlight the following elements:

- Coaching is a continuous journey
- Values and priorities evolve
- Purpose is not found but shaped and created
- The idea of our “desired state” can also evolve and during the coaching process we are here to check-in with all of the above elements at least once a year - to see what changes, what are the patterns, what are the reoccurring challenges and lessons to be learnt.

Don't hesitate to bring your own ideas to a coaching session. Many of our clients are new to coaching and will rely on your expertise to guide them through this process. If a client does not come to a call with specific items to work on please take the lead and guide them through the coaching session.

FRAMEWORK FOR ONGOING COACHING SESSIONS

BEGINNING OF SESSION

- Define Their Priorities — See what has been present for them, or if there are specific things they would like to focus/work on during today's session. Sometimes taking a few (guided) deep breaths with your client at the beginning of each session, allows them to fully arrive into the present moment and gain focus. *Encourage your clients to keep track of things they'd like to work on between sessions.
- Growth Work Follow Up - Check in to see if they have held themselves accountable and integrated/completed their growth work. If they struggled to do so, consider asking the following questions:
  - What got in the way?
  - What resources might have helped you meet your goals?
  - What is a way you can hold yourself accountable in the future?
  - What changes can I expect to hear/see by our next coaching session?

SESSION GUIDANCE

If your client doesn't have specific topics to focus on or the items they want to discuss do not last the duration of the session, guide them by asking powerful questions around the vision established together and the pillars.

<u>Potential Items to Discuss</u>

- Morning Ritual
- Sleep Ritual
- Mindset
- Daily Habits
- Gratitude Practice
- Clearing Conversations
- Feedback
- Workshop Integration Work
- Goals + Coaching Categories from Client Opt-In Assessment
- Revisit 5 Pillars

FRAMEWORK FOR ONGOING COACHING SESSIONS CONTINUED

END OF SESSION

Growth Work Agreements

- Set SMART Goals to accomplish before the next session
- Ask them how they will ensure that they can be accountable to complete the goals
- Explore with them what could potentially get in the way of them completing the goal and what they can do to circumvent that

S: Specific | M: Measurable | A: Attainable | R: Relevant | T: Time-based

Scheduling

After your first session, you should have a recurring Team meeting setup via Outlook. Click HERE to get more details on how to schedule a recurring Teams meeting via Outlook.

For Future Sessions

Encourage your client to keep track of things they'd like to work on in-between sessions, however, you should also have an agenda for each call based on past sessions, recent work, and their goals.

CHECK-INS

Utilize periodic check-ins to get feedback on their experience, including questions such as:

- How are you feeling about your progress and our work together thus far?
- Is there anywhere you'd like to shift our focus or adjust?
- Is there anything you'd like to discuss with or clear with me?

METRICS TO MEASURE CLIENT PROGRESS

Upon opting into the coaching program, each client rates themself on the 20 questions below. Their answers are anonymous and the responses are reported in aggregate. At three months into coaching, participants re-answer the 20 questions for us to evaluate the program impact. Please keep these questions top of mind as you engage in your coaching sessions.

- How much do you feel you are growing and developing professionally?
- How aligned to the company goal and mission do you feel?
- How engaged do you feel at work?
- How content and happy do you feel about your life?
- How clear do you feel about your professional goals over the next 5 years?
- How clear do you feel about your personal goals over the next 5 years?
- How would you rate your level of self-confidence?
- How would you rate your level of self-awareness?
- How would you rate your level of professional motivation?
- How healthy is the balance between your work and your personal life?
- How passionate are you about the work you do with your current company?
- How connected do you feel with your co-workers?
- How would you rate the quality of relationship with your direct supervisor?
- How comfortable do you feel providing upward feedback to your supervisor?
- How would you rate the quality of your relationships in your personal life (friends, family, romantic partnership)?
- How would you rate your ability to manage stress and emotional triggers?
- How would you rate your ability to focus on tasks and be productive?
- How would you rate your current health and wellness level?
- How adept do you feel you are at managing conflict or having challenging conversations?
- How confident do you feel in driving the results you want in your career?

CLIENT
EMAIL TEMPLATES

CLIENT FOLLOW UP | TEMPLATE

Hi (First Name),

I hope that you had a great weekend. I'm excited to begin our coaching engagement!

With respect for your time, I'd like to secure our first session within the next week or so. Please find a time by clicking on my Calendly link below to confirm the date/time that works best for you.

I'm grateful for your efforts in getting us off to a great start to our coaching together. Please feel free to reach out with any questions or concerns.

Insert Calendly link here

Respectfully,
(Your Name)

CLIENT DOESN'T HAVE TIME | TEMPLATE

Hi (First Name),

Thank you for your email, I understand your position and respect your decision.

I'd be happy to schedule our coaching sessions over the weekends or during off-work hours, if that would be more supportive to you? Kindly advise if you're interested in that option.

If not, I hope that we may reconnect at some point in the next few months and I wish you the very best.

Respectfully,
(Your Name)

Please note that working during off hours is not an expectation and up to your own discretion.

CLIENT WANTS TO OPT OUT | TEMPLATE

Hi (First Name),

Thank you for your email, I respect your decision to not participate in the Coaching Program.

You’re able to opt-in to the Coaching Program at any time. If you would like to start coaching sessions in the future, please let me or the Activate 180 team know.

Respectfully,
(Your Name)

Please cc Tara at troberson@activate180.com on your response to the client.

CLIENT NO SHOWS | TEMPLATE

Hi (First Name),

I missed you today! If you could please try to let me know at least 24 hours in advance prior to missing an appointment. This will be very helpful in allowing me to plan for my day. In addition, as part of the A180 agreement, your company is charged for our session if it is not cancelled with 24 hours notice. With that said, I would love to reschedule for a time that works better. Please find a time through my scheduling link to get something back on the books!

Insert Calendly link here

Thank you and looking forward to seeing you on the next session.

Respectfully,
(Your Name)

If a client misses more than 2 sessions please contact a member of the Activate 180 Team.

CLIENTS CANCELS + DOESN'T RESCHEDULE | TEMPLATE

Hi (First Name),

I hope you are doing well! I'm touching base on rescheduling our coaching call. I'd love to get something on the calendar in the next week or two. Kindly find a time through my scheduling link to confirm the date/time that works best for you. Let me know if you can't find a slot that fits.

If you're going through a busy or challenging time right now, don't worry if your growth homework is not complete. I'd love to be there to help you through this. Coaching isn't always a linear path, and I'd love to support your through the challenges that you might be up against. We can take this on together.

Insert Calendly link here

Thank you and looking forward to hearing from you soon!

Respectfully,
(Your Name)

MENTAL HEALTH

MENTAL HEALTH

The following guidelines will help you as a coach understand when the client's needs are outside your coaching competencies.

The International Coaching Federation (IFC) also has resources that can aid in determining whether a client's needs are outside of your scope.

COACHING VS PSYCHOTHERAPY

Coaching is typically about performance improvement, learning, or development in certain areas of life. Therapy, on the other hand, is typically about diving into deep-rooted emotional issues to work toward healing or trauma recovery.

ELEMENTS OUTSIDE OF THE COACHING SCOPE

While you work with your client, watch out for a cluster of signs or chronic symptoms. A cluster of signs can speak to the level of distress that the client is experiencing. When identifying a cluster of signs, take note of the duration, frequency, and intensity of the symptoms.

For example, your client may experience one or more of the signs and symptoms, but they may be manageable and able to be addressed in coaching. The existence of one of these symptoms on its own doesn't mean that your client is experiencing mental health issues.

However, the more symptoms you see and the more indicators that you notice, the more likely it is that your client needs to see a mental health professional.

The descriptions of these mental health categories are not meant to be used to diagnose clients, rather they are intended to help you better understand and identify these issues if they do appear in your client.

They will serve as a guide to help you determine if the elements are outside of the scope of your work. The mental health issues listed below are some of the most common that coaches encounter:

- Chronic Anxiety
- Depression
- Eating Disorders
- PTSD or Trauma
- Substance Abuse or Addiction
- Suicidal Ideation
- Thought Disorders

SIGNS TO LOOK FOR

Chronic Anxiety Symptoms

- Restlessness, feeling keyed up or on edge
- Getting easily fatigued
- Difficulty concentrating or struggling with mind going blank
- Irritability
- Muscle tension, sweating, trembling, dizziness, or rapid heartbeat
- Sleep disturbance (hard time falling or staying asleep, restlessness, or poor sleep quality)

Depression Symptoms

- Loss of interest and enjoyment in daily activities
- Significant weight loss or gain
- Insomnia or excessive sleeping
- Restlessness, irritability
- Lack of energy
- Difficulty concentrating
- Feelings of worthlessness, helplessness, or excessive guilt
- Recurrent thoughts of death or suicide

Note: Grief is a normal and natural reaction when someone experiences loss. If the grief is overwhelming or is causing the person to not be able to think of the present or future, this may be a sign of depression.

Eating Disorder Symptoms

- Constant or obsessive thoughts about food
- Elimination of entire food groups
- Planning or changing their life around diet or food
- Decreased energy level
- Difficulty sleeping
- Mood swings, anxiety, depression, and irritability

Thought Disorder Symptoms

- Paranoia, delusions, hallucinations, or false beliefs
- Rapid, illogical, or incoherent speech
- Rapidly discusses several unrelated topics
- Frequent interruptions in train of thought
- Inability to follow a logical train of thought
- Belief that a person or entity has removed the person’s thoughts

Post-traumatic Stress Disorder (PTSD) or Trauma Symptoms

- Re-experiencing symptoms
- Intrusive thoughts, nightmares, or flashbacks
- Avoidance symptoms
- Avoiding specific thoughts or feelings, people, or situations that serve as reminders of the event
- Negative mood and cognition symptoms:
- Feeling detached, isolated or disconnected
- Being stuck in severe emotions related to the event
- Memory problems that are exclusive to the event
- Hyper-arousal Symptoms
- Difficulty concentrating
- Irritability, anger, temper
- Sleep disturbances

Substance Abuse or Addiction Symptoms

- Increasing tolerance to the substance (alcohol or drug)
- Requiring the substance throughout the day
- Avoiding other activities and failing to meet obligations at home, work, or school
- Dismissing or resenting expressions of concern from loved ones
- Hiding use from family and friends
- Experiencing withdrawal symptoms in the absence of the substance
- Using heavily (binging) for many hours or several days
- Feeling unable to quit

Chronic Anxiety Symptoms

- Talking about feeling hopeless
- Talking about having no reason to continue living
- Making a will or giving away personal possessions
- Searching for a means of doing personal harm, such as buying a gun
- Sleeping too much or too little
- Eating too little or eating too much, resulting in significant weight loss or weight gain
- Engaging in reckless behaviors, including excessive alcohol or drug consumption
- Avoiding social interactions with others
- Expressing rage or intentions to seek revenge
- Showing signs of anxiousness or agitation

STAYING WITHIN COACHING SCOPE OF WORK

We do not encourage our coaches to diagnose or strongly recommend therapy to any of your clients as most coaches are not trained mental health professionals. Activate 180 does support you creating a safe boundary to engage with clients doing what you do best, coaching!

You can communicate to your client that the issues they are mentioning are outside of your level of expertise. Emphasize that they're important to address and another support professional might be more effective in helping.

IF UNCERTAIN, ASK FOR SUPPORT

If you have questions or are unclear on what needs to happen, consult with Layne Cocuzzo, Program Facilitator, at lcocuzzo@activate180.com on next steps.

PAYMENT + SUBMITTING INVOICES

PAYMENT TERMS + PROTOCOL

COMPENSATION

- You will be paid a standard fee per completed coaching hour as stated in your Independent Contractor Agreement.

INVOICING TERMS

- Payments must be submitted through billing.com; contact Taylor Dutton (tdutton@mbexec.com) with any issues or questions.
- Timing
  - Invoices must be submit by the last calendar day of each month.
- If a client cancels after the first session, then you will only be paid for the coaching session completed.
  - Activate 180 will try to reassign a new client when possible, but this is not guaranteed.
- Performance issues, agreement or conduct violations (see below) will prompt discussion and negotiation on how to proceed.

<u>Payment will not be remitted if the following occurs:</u>

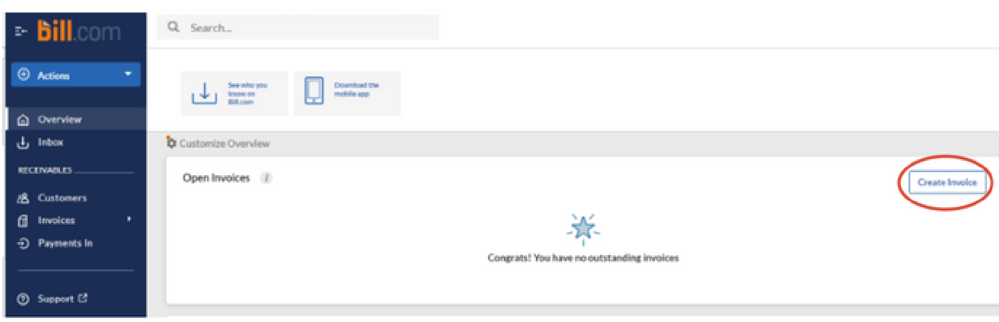
- Inappropriate language
- Tardiness
- Dress code violations
- Poor performance
- Inappropriate behavior and misconduct
- Stealing company property
- Violating contract
- Substance abuse while working

SUBMITTING AN INVOICE

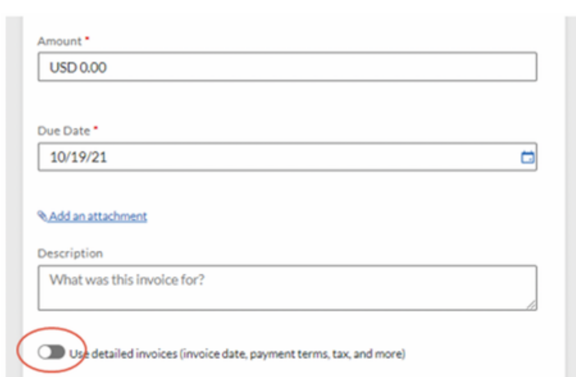
Please submit your monthly invoice by the last calendar day of each month to ensure timely processing and payment. For your invoice to be processed, it is very important that it aligns with the below instructions.

1. Go to https://login.us.bill.com and log in using your credentials:

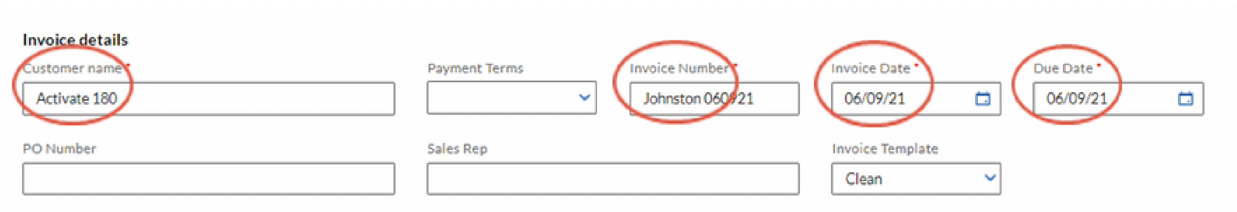
2. Click Create Invoice on center-right of your Overview page.



3. Click the “Use detailed invoices” tab at the bottom of page to expand the invoice template.



4. Complete the following Invoice details:



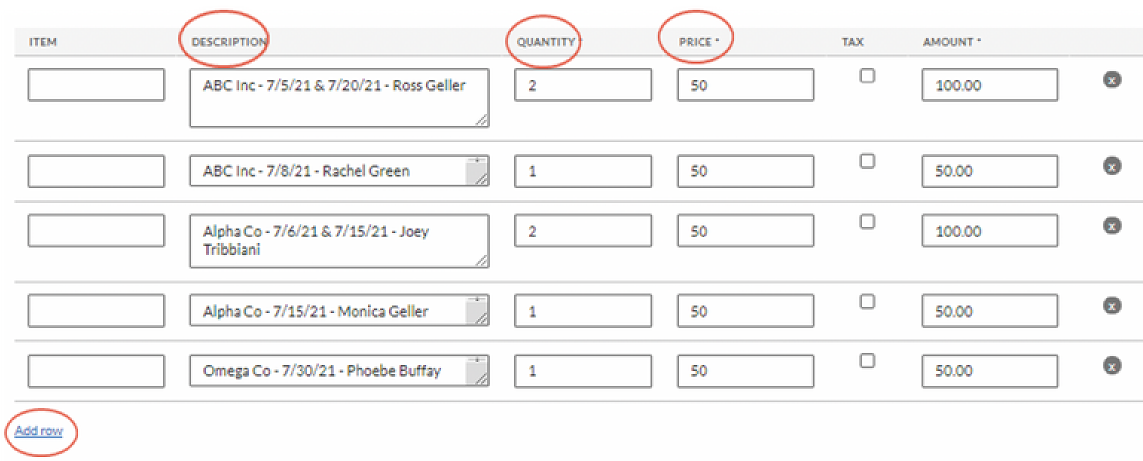
a. Customer name: This will auto-populate to “Activate 180”

b. Invoice Number: Use the format “Last Name – Date of Submission”

   i. Ex: “Johnston – 060921”

c. Invoice Date: Today’s date

d. Due Date: Today’s date



e. Item: Please ignore this section.

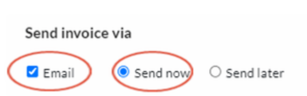
f. Description: Enter a description of each coaching session in a new line item. Click “Add row” near the bottom of the invoice to add line items as needed. The description must be provided in the following format:

Client Name - Date(s) of Coaching - Name of Coachee
i.e. Amazon - 3/11/22 & 3/26/22 - Bob Smith

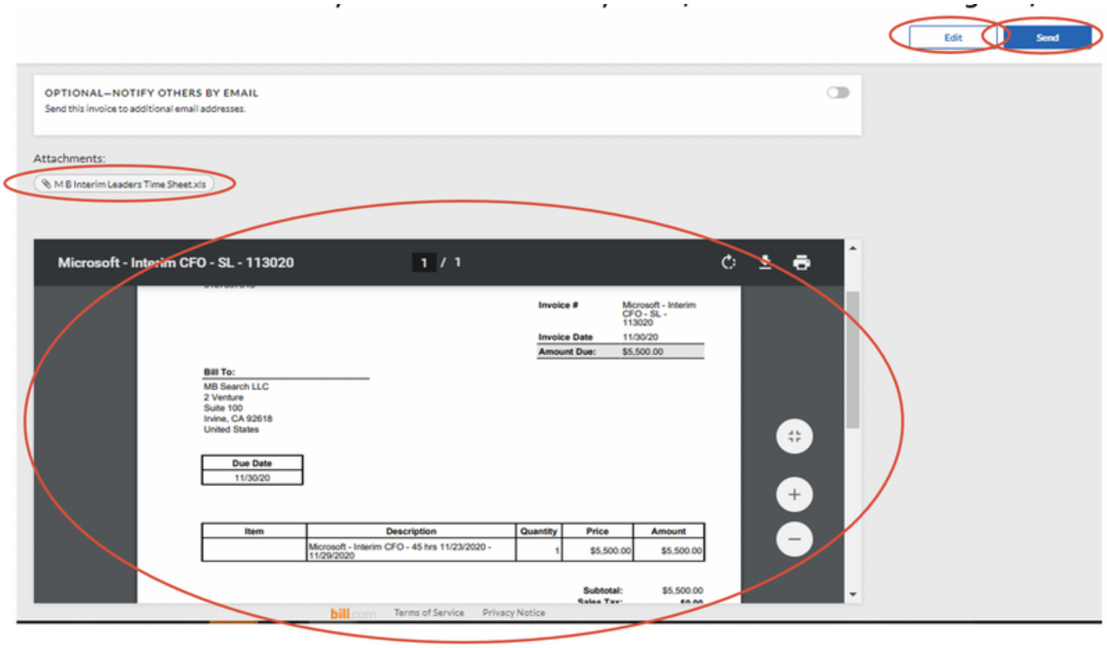
g. Quantity: Enter the number of hours coached.

h. Price: Enter your hourly pay rate associated with the level of coaching employed during each session.

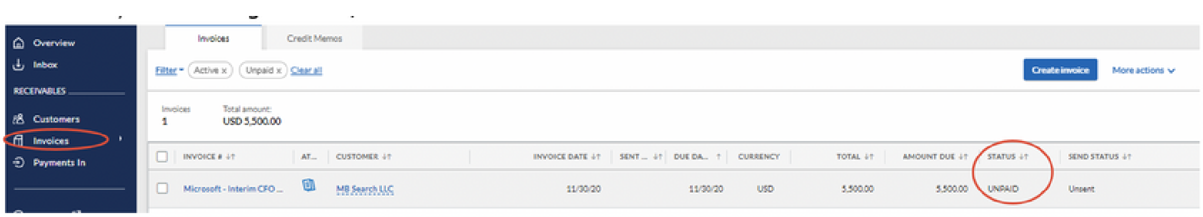
i. Send invoice via: Make sure “Email” is checked and “Send now” is checked at the bottom of your invoice



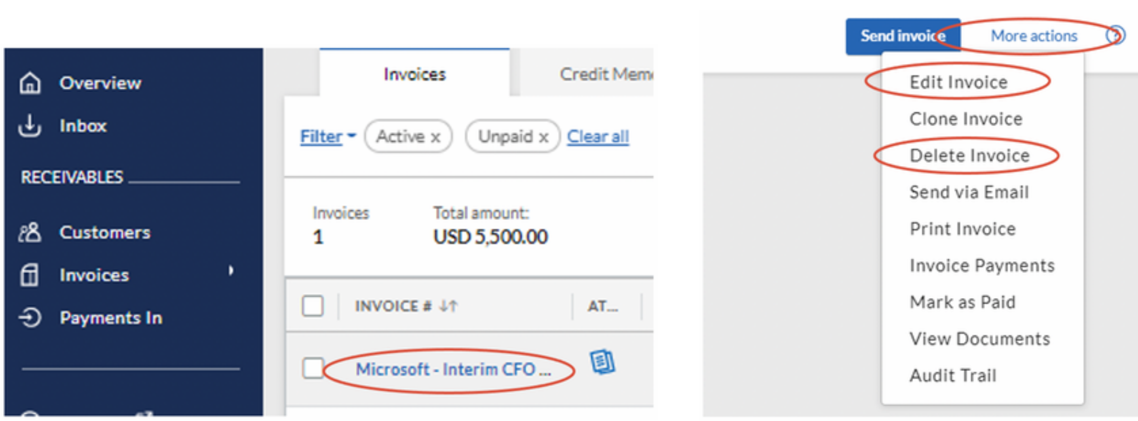
5. Review the submission. If you need to make any edits, click Edit. If all looks good, click Send



6. To view any outstanding invoices, click Invoices and look at the Status



7. To edit or delete the outstanding invoice, click on the name of the invoice and then select More actions to either Edit Invoice or Delete Invoice



RESOURCES + COACH ENRICHMENT

RESOURCES + COACH ENRICHMENT

These resources have been approved by Activate 180 and can be used as support materials for your clients when needed.

Recommended Reading: Atomic Habits by James Clear

PILLAR 1: CAREER

- Activate 180 Blog
- Framework (Ikigai) to help find your passion

- Books on Career:
  - Do What You Love and the Money Will Follow by Marsha Sinetar
  - The First 90 Days: Proven Strategies for Getting Up to Speed Faster and Smarter (Updated and Expanded) by Michael D. Watkins
  - Designing Your Life: How to Build a Well-Lived, Joyful Life by Bill Burnett & Dave Evans
  - Do More Great Work by Michael Bungay Steiner (free worksheets)

- YouTube Channels:
  - Stanford Graduate School of Business
  - TEDx Talks
  - Talks at Google

- Spotify Podcasts:
  - How's Work? With Esther Perel
  - WorkLife with Adam Grant
  - Women at Work - Harvard Business Review

- List of Leadership & Management Experts:
  - Lifehack Top 20
  - Inc. Top 50

- Education and Skill Building Sites:
  - LinkedIn Learning
  - edX
  - Coursera

PILLAR 2: FINANCES

- Clarity Call with Luke Yengo from Continuum Consulting Group

- Books:
  - The Total Money Makeover: Classic Edition: A Proven Plan for Financial Fitness by Dave Ramsey
  - Think and Grow Rich by Napoleon Hill
  - You're So Money: Live Rich, Even When You're Not by Farnoosh Torabi
  - The Latte Factor by David Bach

- Websites:
  - ThriveGlobal
  - NerdWallet
  - The Motley Fool

- Podcasts:
  - Rich Dad Radio Show: In-Your-Face Advice on Investing, Personal Finance, & Starting a Business
  - Financially Speaking with Mitch Slater
  - Suze Orman's Women & Money

PILLAR 3: RELATIONSHIPS

- Books:
  - The Five Love Languages: How to Express Heartfelt Commitment by Gary Chapman
  - The Five Dysfunctions of a Team by Patrick Lencioni
  - Emotional Agility by Susan David
  - Crucial Conversations: Tools for Talking When Stakes Are High by Kerry Patterson, Joseph Grenny, Ron McMillan, Al Switzler
  - Getting to Yes: Negotiating Agreement Without Giving In by Roger Fisher , William L. Ury, et al.
  - Dare to Lead: Brave Work. Tough Conversations. Whole Hearts. by Brené Brown
  - Grit: The Power of Passion and Perseverance by Angela Duckworth
  - Pre-Suasion A Revolutionary Way to Influence and Persuade by Robert Cialdini

- Blogs/Websites/Podcasts:
  - The Gottman Institute (interpersonal relationships)
  - Liane Davey (workplace relationship blog)
  - Non-Violent Communication (compassionately expressing feelings, needs, observations)
  - Unlocking Us, with Brené Brown

- Articles on Emotional Intelligence & Communication:
  - How to Tell Within 5 Minutes If Someone Has High Emotional Intelligence
  - The Thrive Guide to Managing Emotions at Work
  - Leveraging Influence: 5 steps to help move your project forward
  - Executive Presence: What is it?

- Videos:
  - Leadership Advice (Yale School of Management): How Do You Change a Successful Company? Ursula Burns
  - Leadership Advice: Overcome Obstacles, with Edward Norton
  - Advice on Entrepreneurship - Robert F. Smith at Cornell University

PILLAR 4: LIFE EXPERIENCES

- Productivity & 'Life Hacking':
  - Pandemic Productivity Hacks This Clothing Company Will Keep in the 'New Normal'
  - Atomic Habits by James Clear
  - The Tim Ferriss Show
  - The Power of Small Wins by T. M. Amabile and S. J. Kramer
  - Neuroscience Hacks That Can Make You A Better Leader

- Mindset, Positive Psychology, and Mindfulness Books:
  - Mindset The New Psychology of Success by Carol S. Dweck
  - Real Happiness at Work by Sharon Salzberg
  - The How of Happiness by Sonja Lyubomirsky
  - Buddha's Brain: The Practical Neuroscience of Happiness, Love and Wisdom by Rick Hanson
  - Mindsight: The New Science of Personal Transformation by Dan Siegel

PILLAR 5: HEALTH + WELLNESS

- Holistic Health and Wellness Websites:
  - MindBodyGreen
  - Mindful (Blog, Meditations, etc.)
  - The Global Wellness Institute
  - The Mayo Clinic
  - The Greater Good Science Center at the University of California, Berkeley
  - Mindfulness Exercises, Tools, and Practices
  - Mindset by Carol Dereck

- Articles on Sleep:
  - ThriveGlobal Blog
  - Here's What Happens When You Don't Get Enough Sleep (And How Much You Really Need a Night)

- Podcasts:
    - Optimal Living Daily
    - Fortune Reinvent Wellness, or Fortune Brainstorm
    - Feel Better, Live More
    - The Guardian Science Weekly

- Apps:
    - Meditation
        - Headspace
        - Calm
        - Insight Timer
        - Simple Habit
    - Fitness
        - Fitbit
        - Nike Training Club
        - Strava
    - Nutrition
        - MyFitnessPal
        - Noom
        - Lifesum
    - Sleep
        - SleepScore
        - SleepCycle
        - Slumber
        - Pzizz

FEEDBACK

- Articles:
  - Three Questions for Effective Feedback - Thomas J. Long

SELF-WORTH

- Articles:
  - 5 Ways to Improve Your Self-Worth - Nick Wignall

- Videos:
  - What is imposter syndrome and how can you combat it? - Elizabeth Cox (Imposter Syndrome)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