



Resources for leaders
with a vision of Lean
that puts PEOPLE first

Coaching Plans: Terms and Policies

1. **What is a “Coaching Plan?”** It’s an agreement by which I help your organization adopt the *Lean Business Culture* and (if needed) a Lean-friendly Operating System. A coaching plan defines a number of hours of regular “contact time” per month and site-visit time per year. In our first session(s), we will develop a plan tailored for your company. One-size-fits-all doesn’t work well with Lean adoption. If your business doesn’t have a good Operating System, we will implement one as an early part of the plan. We will modify the plan as we go based on what’s working, what’s not, and the challenges we encounter. The content of regular contact and site-visits will include a mix of study, training, setting of short and mid-range goals, and regular accountability as you take action to apply what you learn. Time I invest scheduling contacts, reviewing notes, adopting materials, invoicing, and other administrative functions does NOT count as “contact time.”
2. **What’s a “Lean Friendly Operating System (OS)?”** An OS is a set of meetings, methods, and disciplines by which an organization:
 - Clarifies its purpose, core values, goals, and marketplace strategy
 - Stays on track to ACHIEVE it’s purpose, core values, goals and marketplace strategy
 - Hires, develops, and organized its people for teamwork and high productivity
 - Discusses and makes decisions
 - Addresses problems and continuously improves

An OS affects everyone in the organization, but especially applies to how the leadership team works. EOS (described in the book *Traction*) is currently a very popular Operating System and is mostly compatible with Lean. But a Lean-friendly OS includes several distinctive elements that aren't part of EOS: Here are three examples: The first is Servant-Leadership. Another is developing and engaging EVERY team member to shrink waste, solve problems, and make your company process better. A third is coaching EVERYONE on scientific thinking as the foundation for problem-solving and continuous improvement. Getting a Lean-friendly Operating System in place is one of my early priorities if you don't already have one. In my experience, you don't get far on the Lean journey without one.

3. **Type of regular contact:** If your location is within 30 miles of Lancaster PA, regular contact will mainly be in-person visits. Beyond 30 miles, the farther you are, the more regular contacts will be by phone or Zoom™ meeting.
4. **Schedule of contacts and visits.** I generally try to set a regular contact schedule of days and times for our contacts, but we may need to adjust this based on calendar issues that come up for either of us. In situations of schedule conflict, I usually give preference to my longest-standing clients. The contact hours per month and sessions per month figures are averages and may vary some each month.
5. **No contract.** If we agree on a coaching plan, we should both expect to stick with it for a year. However, either of us may withdraw at any time without further obligation if either feels it is in their best interest.

6. **Change of coaching plan.** You may change coaching plans at any time. In addition, we can always create a custom coaching plan designed for the particular needs of your company.
7. **Fee & payment.** When you enroll in a coach plan, you pay up front for the first month (or partial month). After that, I invoice at the beginning of each month for that month's fee. Terms are "Due on Receipt." If I do not receive payment by the end of the month, I reserve the right to discontinue future contacts until payment is received.
8. **60 day Money-back guarantee.** If you're not satisfied with the coaching plan, let me know in the first 60 days and I will return all fees you've paid. The money back guarantee does NOT apply if my first visit to you was the "Free day of Lean Coaching" which I sometimes offer.
9. **Use of materials.** You may use and edit materials I provide to you, even after our involvement is over. This permission applies to companies you now own or may own in the future. You may not post my materials online or provide them to other parties without my permission.
10. **Photos and Videos.** You grant me permission to take photos and video of your facility and operations for your training, for presentation to other clients, and display to potential clients. I will comply with limits you place on this activity based on religious conviction, confidentiality, and proprietary operations.
11. **I will act with full integrity and honesty.** I will treat you the way I want to be treated. I will only make promises I intend to—and believe I can—keep. I will be as accurate as possible when giving information. I will be honest with observations and advice, even if it is bad or unpleasant news. I will promptly notify you of the following: conflicts of interest which come to light, factors which may change the scope of a project, mistakes I make, or limitations that may affect my ability to complete a project.
12. **Legal and Accounting advice.** My involvement may include discussion about regulations, legal, and financial issues. I am not an attorney or accountant and do not give legal or accounting advice. For such advice, consult an attorney or accountant. I intend to fully comply with all pertinent laws and regulations, including copyright law.
13. **Confidentiality.** I will keep your proprietary information, trade secrets, expertise, and personal/financial matters confidential.
14. **Reviews, Referrals, and Comments.** If you are happy with my services, I hope you will be willing to provide referrals, reviews, and comments. These are very important in today's marketplace. However, I will ask your permission before providing your name as a reference. You may decline to be a reference for any specific company.