

Coaching Services

Business coaching starts with an assessment of the business. We conduct a short assessment to determine the recommended level of coaching support the business will need to achieve its goals and objectives. We offer short-term sessions in addition to longer-term retainer based coaching engagements

Available coaching services includes a variety of options based on the needs of the business:

- Operational assessments
- Business assessments
- Strategic planning
- Change Management
- Operations Management
- Lean workflow (business process improvement)
- Risk Management
- [Training](#)
- Life Balance
- Team Development
- Business Valuation
- Succession Planning
- Lean accounting
- Business start-up
- Buying and selling businesses

Once coaching begins here are the cornerstones of how I mentor and coach:

- I build a real and trust relationship with each client
- I listen
- I share my knowledge and experience
- I teach clients to succeed
 - My clients have typically achieved record growth and profitability under my guidance
 - I have taught accounting and finance to over 3,500 students
 - I have taught MBA basics to over 3,000 students
- Clients know that I am there for them
- I act as an advocate and a promoter for my clients
- I give clients my time and the best of my talent and experience
- I provide a mirror and a reflection so they can see where they are going and why
- I help them measure and evaluate their results
- Coaching knowledge is based on:
 - Financial officer of a multinational corporation
 - Consultant with national and regional CPA firms

- Fourteen years of teaching accounting and MBA skills
- Running my CPA practice serving mom and pop businesses (no business was/or is too small)
- Author of four books and multiple training programs

Coaching is customized into categories based on need:

- Strategic direction
- Operational improvement
- Financial management and measurement
- Life balance
- Advisory board support

It's tough to find a coach who can cover all these bases.

Frequently Asked Questions (FAQ)

1. How do the coaching engagements work?
2. How do you determine what each business needs?
 1. Business needs are developed from the business assessment
3. How will smaller businesses benefit from coaching?
 1. I have serviced numerous small clients and I customize the support they receive based on their needs and growth plans.
4. Describe the mentoring process?
 1. Mentoring includes
 1. Motivation
 2. Coaching
 3. Direction
 4. Success
 5. Training
 6. Advice
5. How does your coaching process fit larger businesses?
 1. I have worked with a wide variety of companies ranging from sole proprietorships to larger complex companies. This gives me an advantage since I have experienced and coached all phases of business size and growth. Also, I was an executive for a complex multi-national corporation which rapidly grew from a smaller organization to a much larger company. This gave me a unique prospective of the needs and challenge of growth and change. Because of these factors, I am a good fit for a wide range of businesses.
6. How long are the coaching meetings?
 1. Typically, the meeting will last from an hour to an hour and a half. However, they can go longer and we can add a supplemental meeting if necessary.

7. Are the coaching meetings limited to just one person?
 1. Because I use Adobe Connect, we can have up to 25 people in each meeting.
8. In addition to the coaching meeting, what other benefits will I receive?
 1. You receive unlimited access to me via text, telephone, and email. Additionally, you receive a monthly performance and measurement report.
9. How are strategic planning and other major projects handled with the coaching process?
 1. These special projects are invoiced separately based upon an agreed engagement letter you know the scope and cost of the project.
10. What if I need coaching but need time to pay for it?
 1. Payment terms can be arranged.
11. Am I locked into the monthly retainer levels?
 1. No, you can opt out of the meetings at any time. You can also increase the level of participation if you think it is needed.
12. Is contact to you as our coach limited to just the scheduled meetings?
 1. No, you have access to me via telephone, text messaging, and email as a supplement to the scheduled meetings.
13. Can I receive additional support in addition to just coaching?
 1. Yes, you can receive CFO and Controllershship support
 2. Tax services
 3. Expanded consulting support based on need and agreement
14. Explain what life-balance coaching includes?
 1. I believe that it is important to maintain a balance between work and your personal life. I have worked extensively with Abigail Barrett of Leadership Transitions, an executive coach who helped found McGladrey and Pullen's Management Development Institute and Dr. Morris Pickens, a sports psychologist who provides performance coaching to professional athletes and businesses. These relationships have provided me with an excellent foundation in guiding and coaching people in these areas.
15. Do you limit the number of clients that you coach?
 1. I limit the number of clients based on the size of the client and the amount of time required to provide the appropriate level of service required for each coaching client. I want each client to fully benefit from their coaching experience.
16. What other support services or training do you offer?
 1. Self-paced training courses
 2. Subscription resources
 3. Blog posts
17. What does the performance measurement and analysis report include?

1. The report includes a dashboard of key results and financial performance.
2. The report also tracks action versus goals and objectives set in the meetings.
3. The report summarizes action steps that are required.

On-going coaching typically provides the maximum benefit to businesses. The level and type of coaching support each business is determined based on the business assessment. Here is what Larry D. Hause had to say about Lynn, "Lynn does a terrific job of providing 'hands on' consulting services to family business owners."

We offer short-term coaching engagements so you can determine if it is right for you. Initial sessions are offered in one-hour segments at \$100 per session. These short-term sessions will help you determine if a monthly coaching engagement is right for you and your business.

A monthly coaching retainer agreement is created based on the level of support you will receive which is defined as either bronze, silver, or gold. Contact me directly to arrange a coaching engagement and take your business to the next level.

Support levels include:

- Bronze - \$500 @ month retainer (fixed fee)
 - One meeting per month combined with a performance report plus telephone, text, and email support
- Silver - \$750 @ month retainer (fixed fee)
 - Two meetings per month combined with performance reports plus telephone, text, and email support
- Gold - \$1,500 @ month retainer (fixed fee)
 - Four meetings per month combined with performance reports plus telephone, text, and email support
- Platinum - Fixed fee retainer is negotiated based on a needs assessment
 - Services are customized to fit specialized situations

Email me with your questions or to arrange for coaching support at cln@northrupcpa.com