



**Crystal Stairs, Inc.**

CONNECTING PEOPLE AND PASSION WITH PROFITABLE PURSUITS!

Jylla Moore Tearte, Ph.D., President and CEO

630-660-6832; 404-567-5210 Fax

[Jylla@Crystal-Stairs.com](mailto:Jylla@Crystal-Stairs.com); [www.Crystal-Stairs.com](http://www.Crystal-Stairs.com)



***High Potential to Full Potential Talent***

***A Service of***

**Crystal Stairs, Inc.**



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## **VISIBLE COACHING INFORMATION GUIDE**

- Overview of Coaching**
- Getting Started**
- Client Intake Form**
- Coachability Index**
- 10 Goals to Reach in the Next 90 Days**
- Coaching Agreement**
- Credit Card Processing Information**
- Coaching Services**
- Coaching Call Preparation Form**
- Coaching Plan**
- Coach Bio**
- Crystal Stairs Client Assessment**
- Coaching Disclaimer**
- Assessment Report Card**



### **WHAT IS COACHING?**

Coaching is an action-driven support system that motivates people and delivers results. Crystal Stairs focuses on leadership skills development and enforces positive organizational engagement as a foundation for the visible coaching methodology.

### **HOW DO WE COACH?**

The client sets the agenda for a regularly scheduled conversation, most often via telephone. The discussion explores options and alternatives resulting in decisive action steps. The coaching technique bridges gaps, causes shifts and encourages “truth” in this safe and trusted environment. Greater self-awareness, gained through assessments and the coaching process, creates a common language, drives goal achievement, strengthens relationships and nurtures effective communication.

### **WHEN IS IT HELPFUL?**

- Business situational leadership
- Life and work transitions
- Small business development
- High performance teamwork
- Book coordination and publishing
- Personal/Professional goal attainment

### **HOW LONG DOES THE COACHING LAST?**

Coaching relationships typically last from three months to a year or more depending on the goals of the Client. Goals incorporate both career and life circles.

### **HOW MUCH DOES COACHING COST?**

A coaching plan is developed and fees are negotiated based on the plan. A time commitment is mutually set in advance. For example, some Clients meet weekly for 30- 60 minutes, while others block out 2 to 3 hour intervals once or twice a month. Team Coaching is also available and costs depend upon the format selected and number of members.

### **WHO USES OUR COACHING SERVICE?**

Coaches are engaged by visionary executives, entrepreneurs, team leaders, corporate managers and people who want results and balance between their work and personal lives. The range of clients extends from Wall Street to the Main Street; from Board Rooms to Project Offices; from teams to individuals. With a team, coaches address task and process issues as well as working relationships and team conflicts.

### **WHAT ARE THE BENEFITS OF COACHING?**

With the knowledgeable direction and support of a Coach, our Clients are able to:

- Set clear objectives and achievable interim goals
- Gain the ability to identify management and communication styles
- Replace procrastination with self-motivation
- Measure progress through accountability
- Achieve goals more quickly



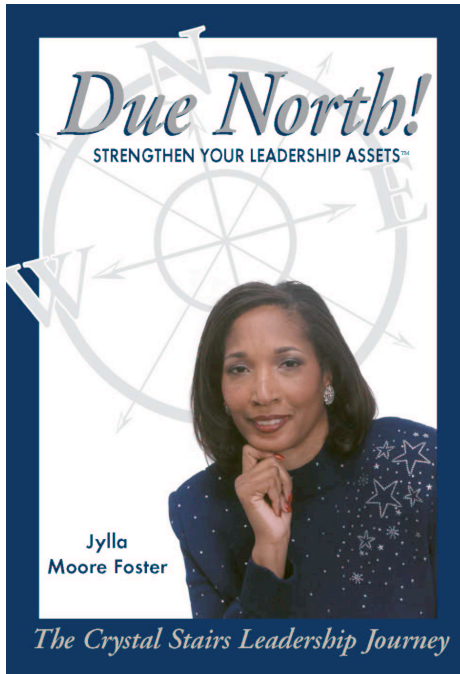
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### **[Due North! Coaching In Action](#)**

The book, *Due North! Strengthen Your Leadership Assets™* includes a chapter on coaching as one of twelve leadership assets. Also, throughout each chapter, Coachable Moments are shared, the Coach Approach to situations is examined, and the coaching language is utilized to develop coaching skills.

A copy of the book can be ordered at [www.Crystal-Stairs.com](http://www.Crystal-Stairs.com).

Clients who sign up for a premium coaching service will receive the book, complimentary.

### **[The Bottom Line... Results](#)**

- Individual motivation to achieve
- Stronger leadership
- Exceptional execution
- Focus on the end game
- Breakthrough thinking



## GETTING STARTED

1. **Submit forms with an asterisk to Dr. Tearte at least 48 hours prior to the first coaching call.**
  - Client Intake Form \***
  - Coachability Index**
  - 10 Goals to Reach in the Next 90 Days \*** (This is a flexible document, but document at least 3 goals.)
  - Coaching Agreement \***
  - Credit Card Processing Information \***
  - Coaching Services** (Provides detail on coaching package.)
  - Coaching Call Preparation Form** (Some clients find it helpful to plan the client coaching component.)
  - Coaching Plan** (Transfer agreed upon dates to this document.)
  - Coach Bio**
  - Crystal Stairs Client Assessment** (This document is provided for self reflection.)
  - Coaching Disclaimer \***
  
2. **Provide the coach with a list of 5-10 potential dates for the first 5 calls. Will confirm the dates with the client.**
  
3. **Complete the following initial assessments upon receipt of email with access codes. Other assessments will be sent as they are engaged in the coaching plan unless client specifically requests them.**
  
4. ***Let's get started!***



## Client Intake Form

Please fill out the form below by placing your responses in the boxes.

First Name		Last Name	
Address		City	
State/Province		Postal Code	
Country		Company	
Title		Home Phone	
Work Phone		Work Extension	
Mobile Phone		Fax Phone	
Work Email		Personal Email	
Occupation		Referred By	
Birthday		Marital Status	
Religious affiliation		Spouse Name	
Anniversary		Children's Names and Birthdays	



## CLIENT COACHABILITY INDEX

### HOW COACHABLE ARE YOU?

**CLIENT INSTRUCTIONS:** Circle the number which comes closest to representing how true the statement is for you right now. Then, score yourself, using the key on the back of the page. Your coach needs for you to be at the place in life where you are coachable. This test helps him/her - and you - discover how coachable you are, right now.

#### (1 – 5) LESS TRUE - MORE TRUE - TRUE STATEMENT

- 1 2 3 4 5 I can be relied upon to be on time for all calls and appointments.
- 1 2 3 4 5 This is the right time for me to accept coaching.
- 1 2 3 4 5 I am fully willing to do the work and let the coach do the coaching.
- 1 2 3 4 5 I keep my word without struggling or sabotaging.
- 1 2 3 4 5 I'll give the coach the benefit of the doubt and "try on" new concepts or different ways of doing things.
- 1 2 3 4 5 I will speak straight (tell the whole truth) to the coach.
- 1 2 3 4 5 If I feel that I am not getting what I need or expect from the coach, I will share this as soon as I sense it and demand that I get what I want and need from the relationship.
- 1 2 3 4 5 I am willing to stop or change the self-defeating behaviors which limit my success.
- 1 2 3 4 5 I have adequate funds to pay for coaching and will not regret or suffer about the fee. I see coaching as a worthwhile investment in my life.
- 1 2 3 4 5 I am someone who can share the credit for my success with the coach.

#### SCORING KEY

\_\_\_\_\_ TOTAL SCORE (add up all numbers)

- 10 - 20 Not Coachable right now.
- 21 - 30 Coachable, but make sure ground rules are honored!
- 31 - 40 Coachable.
- 41 - 50 Very Coachable; ask the coach to demand a lot from you!



## 10 Goals To Reach in the Next 90 Days

What are the goals you most want to set for yourself for the next 90 days? Please select only those goals, which you really want, not the ones you should, could, ought, or might want. Look deep inside and then write down your 10 personal and professional goals and discuss these with your coach. When you set the right goals for yourself, you should feel excited, a little nervous, ready and willing to go for it!! Don't select the goals you historically have chosen, but never reached, unless you're in a much better position to reach them now.

Start Date	Finish Date	The Specific Measurable Goal	Completed
_____	_____	1. _____	_____
_____	_____	2. _____	_____
_____	_____	3. _____	_____
_____	_____	4. _____	_____
_____	_____	5. _____	_____
_____	_____	6. _____	_____
_____	_____	7. _____	_____
_____	_____	8. _____	_____
_____	_____	9. _____	_____
_____	_____	10. _____	_____

*Please develop a 3-step action plan or strategy for each goal and fine-tune this with Crystal Stairs.*

**What are the personal/professional benefits to you of accomplishing each of these goals?**

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



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## COACHING AGREEMENT

CLIENT INSTRUCTIONS: Please review, adjust as necessary, sign where indicated and return to Crystal Stairs.

**CLIENT NAME:** \_\_\_\_\_

**INITIAL TERM:** \_\_\_\_\_ Months, From \_\_\_\_\_ Through \_\_\_\_\_

**FEE:** \$ \_\_\_\_\_ per Hour, \$ \_\_\_\_\_ per Month.  
 Make check payable to **Crystal Stairs, Inc.**  
 Charge credit card; Must have authorization on file

**PAYMENT:** Fees to be received at the end of each session.

**SESSION DAY**  Mon  Tue  Wed  Thu  Fri  Sat  Sun  
**SESSION TIME** \_\_\_\_\_  AM  PM  
**DURATION** \_\_\_\_\_ Minutes  
**FREQUENCY**  Weekly  Every two weeks  Three times per month  Once per month

**CALL PROCEDURE:** Dr. Tearte will call the client at the time arranged by the coaching pair. If either of us needs to reschedule, we will give 24 hours notice so that a mutually satisfactory time can be arranged. Missed appointments with no prior notice will be lost time for the client. If either has an emergency, we will work around it. Calls can be made during trips or vacations or we can make up the time upon return. For executives who find this procedure too rigid, flexibility will be discussed and arranged individually.

**EXTRA TIME:** You may call me if you need advice or cannot wait to share a success. Feel free to email me as often as you like ([Jylla@Crystal-Stairs.com](mailto:Jylla@Crystal-Stairs.com)). Some of my clients enjoy a mid-session report by email or phone. It drives focus and motivation.

### COACHING CALL

**PREP FORM:** It is important that you get the most out of our time together. Please be prepared with an agenda of ideas you wish to work on. The Coaching Call Prep Form provides focus and direction for our calls. Clients find it helpful to complete beforehand, to email me a copy and to keep a copy in front of them as we talk.

**ABOVE AGREED ON:**     /     /     (Date)

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Coach Signature



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## Credit Card Processing Information

I, \_\_\_\_\_ hereby authorize Crystal Stairs, Inc. to charge the following credit card account in the amount shown below for merchant services. This payment agreement will be in effect until services have been completed or are ended by request of the client either verbally or in writing.

### Credit Card Information

Circle Card Type:

American Express

Mastercard

Visa

Card Number: \_\_\_\_\_

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

Name on Card: \_\_\_\_\_

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

Street/P.O. Box (Address must match where credit card statement is sent to)

City

State

Zip

Phone Numbers:      -      -      -      -      -      -

Home

Work

Fax

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

Amount: \_\_\_\_\_

Cardholder's Signature: \_\_\_\_\_

Please fax this completed form to 404-567-5210 or email to [Jylla@Crystal-Stairs.com](mailto:Jylla@Crystal-Stairs.com)

Call 630-660-6832 if any questions.

THANKS!



## **COACHING SERVICES**

### **1. Coaching Assessment Package**

- Copy of *Due North! Strengthen Your Leadership Assets* (\$24.95); *Due North! Mem-Cards™* (\$9.95)
- Online Assessments
  - DiSC® Classic Plus; Behavior Style Determination and detail reports (\$75)  
General Characteristics; Relating to People and Their Environment; Strategies for Creating a Positive Relationship; Strategies for Managing; How You Tend to Manage; Approach to Selling; Managing Sales
  - Indra: Relationships (\$75)
  - Workplace Relationships (\$75)
  - Time Mastery Profile® (\$50); Excellent workbook format and approach
  - Discovering Diversity Profile® (\$50)
  - Team Dimensions (\$50)
  - Managing Work Expectations (\$50)
  - Personal Listening Profile® (\$50)
  - Coping and Stress Profile (\$50)
  - Life Options (\$75); includes book
  - ReCareer Assessment and Book plus 30 minutes complimentary coaching (\$150)
  - Management Style (\$80)
  - Sales Style (\$80)
  - Sales Customer Interaction (\$10)
- Hard Copy Assessments
  - Dimensions of Leadership Profile® (\$25)
  - Personal Learning Insights Profile® (\$25)

### **2. Managing Transition Guide**

Self-Assessment e-workbook (\$24.95) Includes:

- |                                |                                                        |
|--------------------------------|--------------------------------------------------------|
| • Crystal Stairs Life Compass© | • Goals List and 10 Goals to Reach in the next 90 days |
| • Coaching Conversation Model  | • Clean Sweep®                                         |
| • Life Purpose Worksheet       | • Tolerations                                          |
| • Quality of Life 100™         | • Coaching Call Prep Form                              |
| • Team 100™                    |                                                        |

### **3. Other Assessments**

- 363° Feedback on Behavior Styles – Multiple online respondents and 60 minute coaching session (\$300)
- Team/Group Reports available for Behavior Styles, Listening Styles, Diversity, Managing Work Expectations and Time Mastery; (\$42 each); Team View Report - \$25 (All Participants Styles on combined charts)
- Team Culture: Group Report of Behavior Styles of Team; Must have DiSC on file for participants (\$75)
- Action Planners: Sales, Managing Performance, Management Style, Customer Service (\$15 each)

### **4. VISIBLE COACHING NETWORK** (Complimentary registration at [www.Crystal-Stairs.com](http://www.Crystal-Stairs.com))

- E-Newsletters and Announcements
- Tip Sheets

## **INDIVIDUAL COACHING**

**\$400/Hour**

## **GROUP/ORGANIZATION DISCOUNTS:**

Please notify Crystal Stairs if you are eligible for one of the following negotiated quantity discount rates:

NBMBAA Ntential™

BE Women of Power Summit

Odyssey Network

CIO Executive Summit

Black Career Women, Inc.



## Coaching Session Prep Form

Please respond to **BOLD** items in advance of your next coaching session and email back to me.

[Jylla@Crystal-Stairs.com](mailto:Jylla@Crystal-Stairs.com)

<b>Name</b>	
<b>FOCUS</b> (Agenda)	
<b>GOAL</b> (Review 10 goals in 90 days)  <b>REALITY</b>  <b>Accomplished or Learned</b>  <b>Didn't Accomplish</b>	
<b>Challenges/Concerns</b> DISCOVERY QUESTIONS 1. 2. 3.	
<b>ACTION(s)</b> 1. 2. 3.	
<b>ROADBLOCKS</b> Obstacles Barriers to Success	
<b>RECAP</b>  Grateful for	
<b>Date of Next Call</b>	



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## Jylla Moore Tearte, Ph.D.

*Executive Coach, Consultant, Strategic Facilitator, Author, Transitions Scholar Practitioner*

Dr. Jylla Moore Tearte is President and CEO of Crystal Stairs, Inc. The firm specializes in executive coaching, consulting, strategic facilitation, and organization development. A transitions scholar practitioner, she is also a managing principal with Robinson Group Consulting, a minority woman owned certified business, where she leads organization development engagements for higher education clients who implement technology solutions, collaborative investments, and institutional effectiveness. Her passion is to strengthen leadership assets® that will cause conscious and intentional shifts in individuals, teams, businesses, organizations and institutions resulting in the development of legacy leaders and high potential talent.

The firm employs the use of dynamic seminars, innovative Coaching techniques, a battery of assessments, research and *engaged speaking* presentations to help people acquire greater self-awareness, gain professional breakthroughs and reach personal goals. Dr. Tearte's book, "*DUE NORTH! Strengthen Your Leadership Assets®*," was recognized with two prestigious awards: *ForeWord Magazine's* Career Book of the Year Gold Award and Independent Publisher Book Award Finalist for Business/Career Award.

A 22-year veteran of the IBM Corporation, key assignments included VP of operations for the \$7B northeast sales and distribution territory; VP of sales for the \$1B Midwestern small and medium business team; VP of Global Channels; and VP and Client Executive for a major retail account. During her tenure at IBM, she was the recipient of the company's highest sales award on three occasions, as well as the recipient of its U.S. Leadership Award. She also led a Corporate Task Force on Women Customers that resulted in an international marketing and sales focus and testimony to the U. S. House of Representatives Small Business Committee's Congressional Hearing on Women Business Owners.

As International President of Zeta Phi Beta Sorority, a 100,000-member community service organization, she established partnerships with the American Lung Association, the U. S. Space Camp, *Black Enterprise Magazine*, Center for Disease Control, The National Caucus on Black Aged, the March of Dimes and a host of Fortune 500 corporations. During her presidency, she was awarded keys to more than 25 cities and participated in the Fourth United Nation's World Conference on Women in Beijing, China, where she lectured on "The Role of African-American Women Leaders." Inducted into the National Association of Business and Professional Women's Corporate Hall of Fame in 1997, she has been recognized as one of the nation's "Most Influential African-Americans" by *Ebony Magazine*, and hailed by *Black Enterprise Magazine* as a "Woman to Watch." She is listed in the inaugural issue of Who's Who in Black Chicago and in Who's Who in Black Atlanta. She chaired the fund raising committee for the Livingstone College Concert Choir to perform at Carnegie Hall in April, 2010.

Dr. Tearte earned her undergraduate degree in mathematics, magna cum laude, from Livingstone College; MBA in marketing from Indiana University where she was a Consortium Fellow; and, Ph.D. in Organization Development at Benedictine University. Livingstone also awarded her an honorary Doctor of Humane Letters in recognition of her professional achievements and community service. She attended the IBM Client Executive Certification Program at Harvard Business School, the Wharton School for IBM Business Partners and completed training at the Center for Creative Leadership. She published and presented a paper on 50+ talent and social networks as strategy at the International Conference and Doctoral Consortium in Lyon, France in April, 2008.

A charter member of the International Coach Association (ICA) and the Graduate School of Coaching, she is a member of the International Coaching Federation. and the Academy of Management. Dr. Tearte completed her professional training with Corporate Coach University in February, 2002. She is certified in the DiSC® behavior assessment and is a distributor for assessments and training seminars offered by Inscape Publishing, where she is an award winning distributor. She holds certifications as a Retirement Coach, Life Options™ Coach, and ReCareer™ Coach. Signature training programs with assessments include:

DiSC®: Understanding Yourself and Others  
Networking and Strengthening Relationships  
Team Innovation! Your UNIQUE Voice  
The Work/Life Equation; Work Expectations  
Diversity and Inclusion as a Business Driver  
Customer Service

Managing Transitions  
Leading and Coaching High Performance Teams  
Dynamic and Effective Communication  
Coping and Stress  
Time Management  
Sales Leadership

Clients include corporations such as CA, IBM, GE, NBC, Fortune Brands, Microsoft, HP, Cisco, Accenture, EDS, Wachovia, PepsiCo, Shell, Dana, Unlimited Results, Leadership At Its' Best, Robinson Group Consulting, Blockbuster, and Value City Department Stores; professional associations, such as the Executive Leadership Council (ELC), AARP, IT Senior Management Forum (ITSMF), National Black MBA Association, Thurgood Marshall College Fund (TMCFF), National Association of Women Business Owners and Women Business Enterprise National Council; and several educational institutions, including Jackson State University, Northwestern University, Paine College, Livingstone College, University of Illinois at Urbana-Champaign and Savannah State University.



## CRYSTAL STAIRS CLIENT ASSESSMENT

NAME \_\_\_\_\_ Date \_\_\_\_\_

Take a few minutes to spend thinking about yourself. Use this document as a starting point on your journey of self discovery. Review information as you think appropriate with your Coach.

### Your Goals:

What are the three biggest changes you want to make in your life in the next 3 months?

- 1.
- 2.
- 3.

What are the three biggest changes you want to make in your life over the next 3 years?

- 1.
- 2.
- 3.

What are you most wanting to achieve? And do you feel ready for it?

### Your History:

What would you say have been your 3 greatest accomplishments to date?

- 1.
- 2.
- 3.

What is the hardest thing in your life that you have had to overcome?

Who are or have been your major role models?

Have you worked with a coach before or a similar one-on-one adult relationship (e.g. tennis coach, piano teacher, financial planner, etc.)? If yes, what worked well for you and what did not work in the relationship(s)?

What major transitions have you had in the past two years? Entering or approaching a new decade, a new relationship, a new job, a new role, a new residence, change in children's ages/stages, etc.?



### Improvements:

List improvements you would like to make in the following areas of your life.

Family/home life:

Financial situation:

Career or Business life:

Personal Character:

Relationships:

Leisure time:

Self-care:

Learning:

### Your Life:

Who are the key people in your life and what do they provide for you?

Is your life one of your choosing? If not, which parts are being chosen for you?

What is your favorite part of your typical day?

What is your least favorite part of your typical day?

Looking at the past six months of your life, do you like the direction your life is moving in?

On a scale of 1 to 10, 10 high, rate the amount of stress in your life right now.

What are your primary stressors?

List five things that you are tolerating or putting up with in your life at present. (examples: info. you can't find, clutter, rude friends, poor lighting, tight shoes, dented car, job dissatisfaction, dead plants, broken equipments, old appliances, etc.)

- 1.
- 2.
- 3.
- 4.
- 5.



*Yourself:*

List five adjectives that describe you at your best.

- 1.
- 2.
- 3.
- 4.
- 5.

List five adjectives that describe you at your worst.

- 1.
- 2.
- 3.
- 4.
- 5.

What are your 3 major concerns/fears about yourself?

- 1.
- 2.
- 3.

What are your 3 major concerns/fears about life?

- 1.
- 2.
- 3.

What motivates you?

What are you learning/accepting about yourself at present?

*Coaching You:*

What would you like me to do if you get behind on your goals?

How will you know when you are receiving value (i.e. your money's worth) from the coaching process?

What types of approaches discourage you or take away motivation?



Are there any alterations in my natural style you wish me to make when working with you?

Do you enjoy self-assessments and improvement programs?

Here are ways coaching clients use me. Which appeal to you?

Brainstorming strategies together

Support, encouragement and validation

Insight into who you are and your potential

Painting a vision of what you can become or accomplish

Exploring and removing blocks and obstacles to your success

Accountability; checking up on goals

Working through self-improvement programs together

Suggesting or designing action steps

*Potential and Possibility:*

Do you have a personal or professional vision? If so, what is it?

What would you like to contribute to the world?

What do you think is NOT possible to achieve in your lifetime that you wish you could?

What is a dream or goal you have given up on?

What part of yourself, if any, have you given up on?

On a scale of 1 to 10 with 10 high, rate the quality of your life today.



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If you reach the age of 95 and continue to live your life and order your time the way you are right now, what regrets do you think you will have? (tip: complete the statement “I wish I had...”) Do not include things from the past—only things you will regret if you continue your exact present path.

### *Your Tastes:*

Favorite Color(s)

Style of Decorating or Clothing (examples: Traditional, Sporty, Classic, Romantic, Dramatic, Contemporary, Eclectic...anything that describes your style):

Collections (if you have any):

Hobbies:

Favorite Authors, Types of Books or Magazines:

Types of Music you Enjoy, including favorite artists:

Foods/Drinks/Flavors:

Scents (as in, Vanilla, Berry, Old Spice, floral, woody, “new car”, etc.)



## COACHING DISCLAIMER

Please read this section. I ask that you print off this page, sign and fax it back to me. Upon receipt, I will sign and return to you.

**Coach Disclaimer of Liability:** Client hereby employs the Coach for the purpose of advising the Client with respect to Client's leadership skills development, strategic planning, team leadership, and quality of life. Your coach has experience in such matters and agrees to render such coaching services. Client understands and your coach agrees not to be an employment agent, financial analyst, psychotherapist or business manager.

Your coach has not promised, shall not be obligated to, and will not 1) procure or attempt to procure employment, business or sales for the client, 2) perform accounting services, tax advising or investment counseling, or 3) act as a therapist, providing psychological counseling, psychoanalysis or behavioral therapy.

I have read and agreed to the Disclaimer of Liability.

(Client's Signature)

(Date)

(Coach's Signature)

(Date)



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ASSESSMENT	RESULTS	DATE	NOTES	ACTIONS
<b>DiSC® Behavior Styles</b>				
<b>DiSC® 363° for Leaders</b>				
<b>DiSC® Indra™ Relationship (Individual and Dyad)</b>				
<b>Team Dimensions Profile</b>				
<b>Time Mastery Profile®</b>				
<b>Personal Listening Profile®</b>				
<b>Managing Work Expectations</b>				
<b>Discovering Diversity Profile®</b>				
<b>Coping and Stress Profile®</b>				
<b>Life Options™</b>				
<b>ReCareer™</b>				
<b>Management Style</b>				
<b>Workplace Relationships</b>				
<b>Sales Style</b>				
<b>Organization Culture Index (OCI)</b>				