

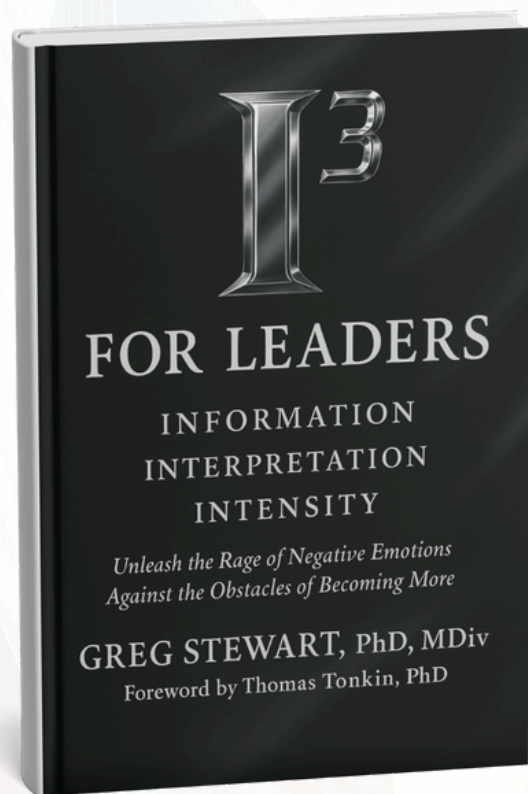


BECOMING MORE
COUNSELING, COACHING, & CONSULTING LLC

Everyone becomes what they want to, only some people think about it.

EVERYONE BECOMES WHAT THEY WANT TO, ONLY SOME PEOPLE THINK ABOUT BECOMING MORE.

STATEMENT OF WORK LEADERSHIP COACHING



GREG STEWART, PHD, MDIV, LPC



Our personality is the default formula we use to accomplish tasks and interact with people. However, our personalities may not always be the most powerful way to influence people in any given situation. Add stress on top of that, we can actually influence people away from us by not utilizing situational leadership, which simply means that there is a right temperament trait for each situation (extraversion/introversion, visionary/detailed, agreeable/decisive). More common, we hurt our influence when we experience stress, and we exaggerate the strengths of our temperament out of the energy produced by stress. Our strength taken too far becomes a weakness (i.e., expressiveness can turn into saying something with too much intensity).

The process by which we master influence is emotional intelligence: 1) self-awareness, 2) others/situational awareness, 3) self-management, and 4) Social intelligence. The first three is an on-going process by which we understand our natural personality, become aware of our current emotional state, read the situation, evaluating the gap between what my mental model is advising me to do or say and the impact of that upon the person, team, or situation I'm trying to influence, and then managing myself to imitate the most powerful mode for that situation.

While the first three components of EI is a cyclical and internal process, Social Intelligence involves the actual skills we can learn to influence the situation (communication skills and critical thinking skills). The process: Our personality run through the process of EI predicts our leadership effectiveness.

	EXTROVERSION External Processing External Energy <i>Feels more powerful than the environment</i>		
Domineering Destructive Demolishing	D Driven, Decisive "Choleric" Big Five: Extroversion Lion	I Influential, Inspirational "Sanguine" Big Five: Open to Experience Otter	Impulsive Insensitive Insulting
GOAL ORIENTED Pessimistic <i>The world is a problem to be solved.</i>	C Calculated, Conscientious "Melancholy" Big Five: Conscientiousness Beaver	S Sweet, Sincere, Steady "Phlegmatic" Big Five: Agreeableness Golden Retriever	PEOPLE ORIENTED Optimistic <i>The world is an event to be experienced with others.</i>
Critical Crushed Crippled	INTROVERSION Internal Processing Internal Energy <i>Feels less powerful than the environment</i>		Scared Subjugated Sanctioning





*Dr. Greg Stewart lives in Rockwall, TX and is currently a full-time telehealth counselor, executive coach, and consultant. He has a BA in Organizational Leadership (Cornerstone University), a Master of Divinity (Grand Rapids Theological Seminary), a MA in Counseling (GRTS), and a PhD in Counselor Education and Supervision (Regent U). His dissertation was *The Relationship of Emotional Intelligence to Job Satisfaction and Organizational Commitment*. He wrote a trilogy on his concept of I3 – Information, Interpretation, Intensity. The first is *I3: Unlock the Inner Strength Behind Your Negative Emotions*. His second: *I3 for Couples: Facing Our Negative Emotions to Build Intimacy in Marriage*. And his third: *I3 for Leaders: Unleash the Rage of Negative Emotions Against the Obstacles of Becoming More*.*

He was a pastor for 15 years in Portage, MI (youth, associate, senior), and was an Organizational Development Strategist for three years, traveling the country training and coaching leaders at all levels in all types of industries. Most recently, he served as the Director of the Residential Treatment Center for Cedar Crest Hospital and RTC in Belton, TX. He also has served as an adjunct professor for 20 years for a number of universities (Regent University, Cornerstone University, John Brown University, and Grace College & Seminary). Dr. Stewart and his wife are empty-nesters and are members of Lakepointe Church in Rockwall and lead a small group together.

The
MAXWELL
DISC
METHOD





Effective Date: _____

Between: *Becoming More Counseling, Coaching, & Consulting*

Dr. Greg Stewart, Owner

("Coach" or "Becoming More")

1803 Navarre Way, Rockwall, TX 75032

www.drgregstewart.com

greg@drgregstewart.com

(469) 485-0387

And: *CLIENT*

("Client")

CONTACT INFO

This Statement of Work ("SOW") defines the services to be provided by Becoming More to Client for the benefit of Client's designated participant(s) ("Participant(s)" or "Executive").

1 PURPOSE & SCOPE

1.1 Coaching Objectives

The coaching engagement is designed to:

- Enhance leadership effectiveness and executive presence*
- Develop strategic thinking and decision-making capabilities*
- Improve communication and interpersonal skills*
- Navigate organizational challenges and transitions*
- Strengthen team management and collaboration*
- Achieve specific professional developmental goals as identified during intake*

2 SERVICES & DELIVERABLES

2.1 Initial Assessment Phase

- Pre-Coaching Consultation (60-90 minutes): Initial meeting with Coaching Participant to establish rapport, assess needs, and identify goals*
- Stakeholder Interviews (Optional): Up to three (3) interviews with Client's designated stakeholders (e.g., supervisor, peers, direct reports) to gather 360-degree feedback*
- Assessment Administration (Optional): Utilization of leadership assessment tools as appropriate (e.g., personality inventories, emotional intelligence assessments, leadership style evaluations)*
- Individual Development Plan: Creation of a customized coaching plan with measurable objectives and success metrics*



2.2 Core Coaching Services

- *10 (Ten) One-on-One Coaching Sessions: Regularly scheduled individual sessions conducted in-person, via video conference, or by telephone*
- *Intersession Support: Email and brief telephone support between scheduled sessions for urgent matters or progress check-ins (limited to reasonable requests)*
- *Progress Review Sessions: Mid-point and final review sessions to evaluate progress toward goals and adjust coaching plan as needed*

2.3 Documentation and Reporting

- *Session Notes: Coach will maintain confidential session notes for professional purposes*
- *Progress Summaries: At Client's request and with Executive's consent, Coach will provide high-level progress summaries (without disclosing confidential session content) at designated intervals.*
- *Completion Report: Final summary report documenting goals achieved and recommendations for ongoing development*

3 TIMELINE & SCHEDULE

Commencement: _____ Completion: _____ Duration: _____

3.1 Scheduling

- *Coaching sessions will be scheduled by mutual agreement between Coach and Coaching Participant*
- *Sessions must be scheduled at least forty-eight (48) hours in advance*
- *Coach will make reasonable efforts to accommodate Executive's schedule and time zone*

3.2 Cancellation and Rescheduling

- *Either party may cancel or reschedule a session with at least twenty-four (24) hours advance notice without penalty*
- *Cancellations with less than twenty-four (24) hours' notice (excluding emergencies) will result in forfeiture of that session*
- *No-shows without prior notice will be charged as completed sessions*

4 FEES & PAYMENT TERMS

4.1 Professional Fees

Total Engagement Fee: **\$3200.00**

Payment Structure: Upfront Payment: Full fee due upon execution of this SOW

4.2 Additional Services

The following services, if requested, will be billed separately at Becoming More's standard rates:

- *Additional stakeholder interviews beyond three (3): **\$300.00 per interview***
- *Assessment tools requiring purchase or licensing fees: Included in pricing*
- *Travel expenses for in-person sessions (if outside DFW Area): Actual costs including mileage, lodging, and meals*
- *Workshop or group facilitation: **\$300.00 per hour***



4.3 Payment Terms

- *Invoices will be issued immediately upon signed SOW.*
- *Payment is due within thirty (30) days of invoice date*
- *Accepted payment methods: Check, ACH transfer.*
- *Late payments will incur a service charge of 1.5% per month (18% annual percentage rate)*
- *Services may be suspended for accounts more than thirty (30) days past due*

4.4 Expenses

Unless otherwise agreed in writing, all services will be provided remotely. If in-person sessions are requested and agreed upon, Client will reimburse reasonable travel expenses including:

- *Round-trip mileage at current IRS standard rate*
- *Lodging for overnight stays (mid-range accommodations)*
- *Meals during travel (reasonable costs)*
- *Expense reimbursement requests will be submitted with supporting documentation within thirty (30) days of incurrence.*

5 RESPONSIBILITIES

5.1 Becoming More's Responsibilities

Coach agrees to:

- *Provide professional coaching services in accordance with International Coaching Federation (ICF) Code of Ethics and Core Competencies*
- *Maintain appropriate professional liability insurance*
- *Prepare for and attend scheduled coaching sessions*
- *Maintain confidentiality as outlined in Section 6*
- *Provide a safe, non-judgmental environment for Executive's development*
- *Offer objective perspectives, insights, and feedback*
- *Hold Executive accountable to stated goals and commitments*

5.2 Client's Responsibilities

Client agrees to:

- *Remit payment according to the schedule outlined in Section 4*
- *Provide reasonable access to Coaching Participant during business hours*
- *Support Executive's participation in coaching process*
- *Communicate organizational context relevant to coaching goals (with Executive's knowledge)*
- *Designate point of contact for administrative and billing matters*

5.3 Coaching Participant's Responsibilities

Executive agrees to:

- *Actively engage in the coaching process*
- *Attend scheduled sessions and arrive prepared*
- *Complete agreed-upon actions between sessions*
- *Communicate openly and honestly with Coach*
- *Take ownership of personal development and goal achievement*
- *Provide feedback to Coach about coaching effectiveness*



6 CONFIDENTIALITY

6.1 Coaching Relationship Confidentiality

All information disclosed by Coaching Participant during coaching sessions is strictly confidential. Coach will not disclose any information shared during sessions to Client or any third party without Executive's express written consent, except as required by law or professional ethics.

6.2 Exceptions to Confidentiality

Coach may be required to breach confidentiality in the following circumstances:

- Imminent risk of harm to self or others
- Suspected abuse or neglect of a child, elderly person, or dependent adult.
- Court order or subpoena
- Professional consultation with qualified supervisors or colleagues (de-identified information only)

6.3 Progress Reporting

Any progress reports or summaries provided to Client will be high-level and focused on goal achievement. Specific content of coaching conversations will not be disclosed unless Executive provides written authorization using Becoming More's standard Release of Information form.

6.4 Organizational Confidentiality

Coach acknowledges that information about Client's business operations, strategies, and personnel matters may be shared during the engagement. Coach agrees to maintain confidentiality of such proprietary and sensitive information.

7 IMPORTANT DISTINCTIONS

7.1 Coaching vs. Therapy

Executive coaching is distinct from psychotherapy or mental health counseling. Coaching focuses on:

- Future-oriented goal achievement
- Performance enhancement
- Leadership skill development
- Professional growth and career advancement

Coaching does not:

- Diagnose or treat mental health conditions
- Provide therapy for psychological disorders
- Substitute for clinical mental health services

If mental health concerns arise during coaching, Coach may recommend additional sessions for counseling (separate from coaching sessions) or that Executive seek appropriate clinical services.

7.2 Coaching vs. Consulting

Coach serves as a thought partner and facilitator of Executive's own insights and solutions. Coach does not:

- Provide specific business consulting or advisory services
- Make decisions on behalf of Executive or Client
- Guarantee specific business outcomes or results

7.3 Coaching vs. Therapy Disclaimer (No Therapist-Client Relationship)

The coaching services provided under this SOW are for professional and leadership development purposes only and are NOT mental health counseling, psychotherapy, diagnosis, or treatment of any mental health condition. This SOW and the coaching engagement do not create a therapist-client relationship. If the Executive requires or desires mental health counseling or therapy services, the Executive should seek services from a licensed mental health professional, and Coach may recommend appropriate resources.



8 NATURE OF COACHING RELATIONSHIP

8.1 Professional Relationship

The relationship between Coach and Coaching Participant is strictly professional. The coaching engagement does not create:

- *An employment relationship*
- *A fiduciary duty beyond professional ethical obligations*
- *A therapeutic or clinical relationship*
- *Legal, financial, or business advisory relationship*

8.2 Executive's Autonomy

Coaching Participant retains full autonomy and responsibility for:

- *All decisions and actions taken*
- *Implementation of strategies and commitments*
- *Professional and personal outcomes*
- *Career and organizational choices*
- *Coach provides support, accountability, and perspective but does not make decisions for Executive.*

9 RESULTS & OUTCOMES

9.1 No Guarantee of Results

While Coach will provide professional services in good faith and consistent with industry standards, Client and Executive acknowledge that:

- *Coaching outcomes depend significantly on Executive's engagement, effort, and implementation*
- *Individual results vary based on numerous factors outside Coach's control*
- *No specific business outcomes, promotions, or performance improvements are guaranteed*
- *Success requires active participation and commitment from Executive*

9.2 Success Factors

Optimal coaching results typically require:

- *Regular attendance and engagement in sessions*
- *Completion of intersession commitments*
- *Openness to feedback and new perspectives*
- *Organizational support for Executive's development*
- *Sufficient time and resources for implementation*

10 INTELLECTUAL PROPERTY

10.1 Becoming More's Materials

All coaching materials, frameworks, assessments, templates, and methodologies provided by Coach remain Becoming More's intellectual property. Client and Executive may use these materials for personal development purposes but may not:

- *Reproduce or distribute materials without Becoming More's prior written consent*
- *Use materials for commercial purposes*
- *Claim ownership or authorship of Becoming More's proprietary content*

10.2 Executive's Work Product

All insights, strategies, plans, and content created by Executive during the coaching engagement belong to Executive and/or Client (per their employment agreement).



11 LIMITATION OF LIABILITY

11.1 Liability Cap

To the maximum extent permitted by law, Becoming More's total liability arising from this engagement shall not exceed the total fees paid by Client under this SOW.

11.2 Consequential Damages Waiver

Neither party shall be liable for indirect, incidental, special, consequential, or punitive damages, including but not limited to:

- Lost profits or revenue
- Business interruption
- Loss of business opportunities
- Reputational harm
- Career impacts

11.3 Client Acknowledgment

Client acknowledges that coaching involves exploring challenges and may temporarily increase stress or discomfort as Executive works through developmental areas. Such experiences are a normal part of growth and development.

12 TERMINATION

12.1 Termination for Convenience

Either party may terminate this engagement with fourteen (14) days written notice.

Upon termination by Client:

- Client will pay for all services rendered through the termination date
- If upfront payment was made, unused session fees will be refunded on a pro-rata basis
- No refund will be provided if more than 75% of contracted sessions have been completed

Upon termination by Coach:

- Coach will provide appropriate notice to allow for transition
- Client will be refunded for any prepaid services not yet rendered
- Coach will provide recommendations for alternative coaching resources if requested

12.2 Termination for Cause

Either party may terminate immediately for material breach, including but not limited to:

- Non-payment of fees (Client breach)
- Violation of confidentiality (Coach breach)
- Harassment or abusive behavior
- Violation of professional ethics
- Misrepresentation of qualifications or credentials

12.3 Natural Conclusion

This engagement will naturally conclude upon completion of the contracted number of sessions or the end date specified in Section 3, whichever occurs first.



12.4 Post-Termination Obligations

Upon termination or conclusion:

- All outstanding fees become immediately due
- Confidentiality obligations continue indefinitely
- Coach will provide final documentation as outlined in Section 2.3
- Materials and intellectual property provisions remain in effect

Becoming More maintains professional liability insurance appropriate for coaching and consulting services. Upon request, Coach will provide:

- Proof of professional liability insurance
- Professional credentials and certifications
- Relevant education and training documentation

13. INSURANCE AND CREDENTIALS

Becoming More maintains professional liability insurance appropriate for coaching and consulting services. Upon request, Coach will provide:

- Proof of professional liability insurance
- Professional credentials and certifications
- Relevant education and training documentation

14 GENERAL PROVISIONS

14.1 Entire Agreement

This SOW, together with any attachments and the underlying coaching agreement (if applicable), constitutes the entire agreement between the parties regarding the subject matter herein and supersedes all prior negotiations, understandings, and agreements.

14.2 Amendments

This SOW may only be amended by written agreement signed by both parties.

14.3 Independent Contractor

Coach is an independent contractor, not an employee of Client. Coach is responsible for all taxes, insurance, and business expenses related to services provided.

14.4 Assignment

Neither party may assign this SOW without the prior written consent of the other party, except that Becoming More may assign billing and administrative functions to qualified contractors bound by confidentiality obligations.

14.5 Severability

If any provision of this SOW is found invalid or unenforceable, the remaining provisions will remain in full force and effect.

14.6 Waiver

Failure to enforce any provision of this SOW does not constitute a waiver of that provision or any other provision.

14.7 Governing Law

This SOW shall be governed by the laws of the State of Texas, without regard to conflict of law principles.

14.8 Dispute Resolution

The parties agree to first attempt to resolve any disputes through good-faith negotiation. If negotiation fails, disputes will be resolved through mediation before pursuing litigation. Any litigation shall be conducted in the appropriate courts of Rockwall, Texas.



15 ACKNOWLEDGMENTS & SIGNATURES

By signing below, both parties acknowledge that they have:

- Read and understood all terms and conditions of this SOW*
- Had opportunity to ask questions and seek legal counsel if desired*
- Agreed to all provisions contained herein*
- Authority to enter into this agreement on behalf of their respective organizations*

Client acknowledges:

- Coaching is not therapy or clinical mental health treatment*
- Results depend on Executive's engagement and effort*
- No specific outcomes are guaranteed*
- Confidentiality protections for Coaching Participant*

Becoming More acknowledges:

- Obligation to provide professional services consistent with industry standards*
- Commitment to maintain confidentiality as outlined*
- Responsibility to conduct services ethically and professionally*

SIGNATURES

BECOMING MORE COUNSELING, COACHING, & CONSULTING

Dr. Greg Stewart, Owner

Date

CLIENT ORGANIZATION

Executive

Date

COACHING PARTICIPANT ACKNOWLEDGMENT

I acknowledge that I have reviewed this Statement of Work and understand the nature of the coaching relationship, confidentiality provisions, and my responsibilities as Coaching Participant.

Coaching Participant

Date

Document Reference: SOW-ELC-2026-_____

This Statement of Work has been prepared for the specific engagement described herein. For questions or clarifications, please call 469-485-0387 or visit www.drgregstewart.com