



PROGRAM GUIDE:

THE *WorkSmart* COACHING

A DIVISION OF BEYOND BOOKSMART

COACHING JOURNEY

A Unified, Skill-Building Path for Transformation



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As a neuropsychologist who evaluates children and adults, Beyond BookSmart & WorkSmart Coaching have been a top recommendation for my team and for patients with Executive Functioning issues.” - Dr. Shana Muslin

YOU'RE NOT LAZY

In today's high-demand world, Executive Function skills are the engine behind everything you do. Whether you're advancing your career, managing a household, or trying to build healthier routines, your success hinges on your ability to manage time, resist distractions, stay organized, and regulate your emotions.

When these skills falter, the consequences are very real: career burnout, financial stress, and strained relationships. If this hits a bit too close to home, there's one thing you need to know: **you're not lazy.**

Between technology neuro-engineered to steal your attention and the relentless deadlines of the modern workplace, it's a miracle anyone gets anything done. You've likely tried to muscle your way into better habits, only to find that sheer willpower isn't enough.

The good news? You don't have to do it alone.

For 20 years, we've used the science of behavior change to help tens of thousands of people unlock their potential. Because the stakes and stressors of adulthood are fundamentally different from those of students, we created WorkSmart Coaching - a specialized division built specifically for adults.

While this division is dedicated entirely to your unique needs and challenges, it's powered by Beyond BookSmart's proven, foundational framework: The Coaching Journey.



What is the Coaching Journey?

The coaching journey is a framework we designed to guide you from struggle to success and is the culmination of 20+ years' worth of Executive Function coaching.

The coaching journey follows 7 simple steps, which repeat each time a goal is achieved.

- 1 Find Your Coach
- 2 Set Your Goal
- 3 Plan the Work
- 4 Work the Plan
- 5 Hit Your Goal
- 6 Reflect & Raise the Bar
- 7  Own Your Growth

In this guide we're going to explore each step in detail so you can understand how our program will help you overcome the challenges you're facing and achieve your goals.

COACHING JOURNEY

Let's quickly review the coaching journey stages and see how each step takes you from struggle to success through small changes, consistency, and an expert coach.

1

FIND YOUR COACH

Using your unique needs and preferences, our matching process will identify the best-fit coach from our pool of over 150 coaches - all of whom hold at least a master's degree or equivalent.

2

SET YOUR GOAL

You and your coach will talk through your challenges and aspirations to determine one priority goal to focus on in your coaching sessions.

3

PLAN THE WORK

With the guidance of your coach, you will co-create an Action Plan based on your priority goal. This plan breaks your goal into clear, manageable steps and identifies the tools and strategies you'll use to make progress.

4

WORK THE PLAN

Over the next several months, you will do the work, both in and between sessions, to achieve your goal through small changes that eventually evolve into new habits.

5

HIT YOUR GOAL

As a result of your consistent effort week to week, your first priority goal is reached (and celebration is in order!)

6

REFLECT & RAISE THE BAR

Now that you've reached your goal, it's time to reflect on your progress and determine how to build on your success. At this stage, you can decide if you're satisfied with your coaching transformation. If there are goals you'd still like to achieve, the process repeats from step two and continues as needed.

7

OWN YOUR GROWTH

Once you're satisfied with your coaching progress and are ready to take ownership of your growth, you can continue to apply what you've learned and thrive with confidence and self-efficacy.

STEP 1: FIND YOUR COACH



Before coaching even begins, we take the time to deeply understand your unique strengths, challenges, and aspirations. From this shared understanding, **we'll identify the best-fit coach from our team of 150+ Executive Function experts.**

WHY IT MATTERS

We know that a strong coach–client relationship is what makes this work so powerful. When clients feel truly understood and supported, they are far more likely to engage, try new strategies, and sustain their efforts when things get hard. Our coaches serve as expert partners, helping you build the confidence and skills you need to make meaningful change in your life.

WHAT THIS REALLY LOOKS LIKE



- 1 To ensure we understand the full context of your needs, working style, and preferences, we begin with a **comprehensive needs assessment** to evaluate current challenges, diagnoses, and aspirations. From this evaluation, we build a more holistic understanding of your coaching needs.

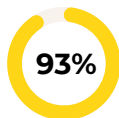
★ For your needs assessment, you can choose a more conversational approach, which involves **an inquiry call** with one of our team members, or complete **the enrollment form** right on our website.



- 2 Using the insights you share, we'll match you with a coach whose background, style, and expertise are best suited for your coaching needs.



You can be confident in this match knowing that all our coaches hold a Master's degree, equivalent, or higher, and complete ongoing professional development.



Thanks to the detailed information our prospective clients provide, as well as our exceptional coach team, 93% of new clients stick with their first coach match.

HOW YOU'LL BE INVOLVED

As the person who's actually looking to improve their life, who could have a better lens on your ideal support style than you? For this reason, we'll be leaning on your input to ensure that the coach is a strong fit. In the rare instance that the first match isn't the right fit, **we will re-evaluate and rematch free of charge - guaranteed.**

STEP 2: SET YOUR GOAL

Now that you have your coach, you're ready to set your first priority goal for coaching.

Narrowing in on your priority goal is a collaborative process that's designed to meet at the intersection of your most pressing challenge and your coach's most relevant area of expertise. We also ensure that your goal is SMART (specific, measurable, actionable, realistic, and timely).

This goal setting processes will happen in an initial Goals and Alignment meeting that's designed to get everyone on the same page about the direction of coaching.



HOW THE PRIORITY GOAL IS CHOSEN

Using the information you share in the needs assessment, your coach will use the Goals and Alignment meeting to build a clearer picture of your routines, responsibilities, mindset, and readiness for change before collaborating with you to narrow in on a strong priority goal for coaching.

When we say "readiness for change," we really mean "when it comes to making a particular change in habit or routine, are you resistant, motivated, or somewhere in between?" Depending on the answer, we modify our approach to setting a priority goal to ensure the pace matches the readiness. For example, if there's some resistance, the priority goal will likely be oriented around breaking through the resistance. **The Transtheoretical Model is the foundation for how we do this** - if you'd like to learn more about it, scroll down to the first page of this document's appendix.

Through this guided reflection and structured conversation, **your coach will help clarify one initial priority goal for coaching based on three key factors:**

- ★ What change would be most meaningful and motivating?
- ★ Which Executive Function skills are needed to make the change?
- ★ Is the change realistically achievable within 3-4 months?

WHY ONE PRIORITY GOAL

Research on behavior change shows that trying to work on multiple goals all at once often leads to overwhelm and stalled progress. Focusing on one priority goal creates clarity about what you're working toward and how week-to-week efforts are contributing to that goal. As small changes are introduced, this clarity creates momentum, and those small changes snowball into a big transformation.

WHAT THIS LOOKS LIKE IN ADULT LIFE



AT WORK

Goals often focus on improving how you manage your time during the workday, prioritizing complex long-term projects, or managing email and meeting overwhelm so the workload feels more manageable.



AT HOME

Goals often center around creating reliable systems for daily life, such as staying on top of finances, managing household chores, or organizing personal materials without feeling chaotic.



SELF-CARE

Goals often focus on establishing boundaries to prevent professional demands from negatively impacting personal time, learning how to start tasks without procrastinating, and limiting distractions.

ACCOUNTING FOR ADDITIONAL GOALS

Although early coaching sessions will focus on one priority goal, our coaching framework is designed specifically to raise the bar every time a priority goal is reached by creating a new goal to work on in coaching.

WHAT HAPPENS NEXT?

At the end of your Goals and Alignment meeting, you and your coach will confirm a weekly session time and meeting cadence. **We strongly recommend a weekly 45-minute session** as this provides enough time and consistency to build momentum, practice skills, and address challenges before they pile up. Weekly frequency also supports habit-building and makes progress more predictable.

STEP 3: PLAN THE WORK

Once a clear priority goal is in place, you and your coach will create an action plan that translates the priority goal into a small set of habits, routines, and systems that collectively build toward that goal every week. Rather than focusing on isolated tasks, the action plan aims to introduce the systems that will help you work toward your priority goal.

Our systems are based in the science of Executive Function and pull from the most effective tools, apps, and strategies in the industry.

375+

From over 375 tools, your coach will hand-select the ones that will be most helpful for you and work with you to turn those tools into reliable systems for completing work.

Some examples of skills these systems support include:

- 1 How work is prioritized
- 2 How tasks are started
- 3 How time is managed
- 4 How materials are organized
- 5 How distractions are limited



WHY IT MATTERS

Perhaps you know exactly what you're supposed to do, but you still struggle to get organized and follow through. **As coaches, we believe that when there's a way, there's a will.** In other words, if you know the exact steps that are required to achieve something, you'll feel far more motivated because you actually know how to do it. The action plan is designed to create your "way" by establishing clear action steps you can follow week to week and relevant systems you can lean on to complete your weekly tasks and professional or personal commitments with confidence.



WHAT THIS LOOKS LIKE IN PRACTICE

The action plan will be created in the session following your goals and alignment meeting, where your coach will translate the priority goal into essential action steps. Rather than listing daily tasks, the focus is on building the habits and systems you can rely on independently.

Each action step is chosen because it addresses a specific challenge identified earlier and, crucially, can be consistently applied to manage week-to-week demands and responsibilities.



We also factor in your readiness for change. If you're feeling overwhelmed or a bit resistant to upending your current habits, we often add an extra step to the action plan for building awareness about the problem and solidifying your buy-in on the benefit of finding a solution.

For example, if a priority goal involves managing long-term assignments more effectively, the action plan won't just be "finish the project." Instead, it might include:

- ★ Creating one consistent system for tracking major deadlines
- ★ Breaking larger responsibilities into manageable steps
- ★ Establishing a regular routine for looking ahead
- ★ Setting up simple organization systems for materials

Each step is designed to be clear, doable, and directly connected to your goal. Together, you and your coach consider what will create early success to build confidence, knowing that the plan can evolve as skills strengthen. The result is a shared, visible plan that provides direction without rigidity - clear enough to guide the work, yet flexible enough to adapt as needed.

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STEP 4: WORK THE PLAN

With an action plan in place, the real work begins. You and your coach start working the plan by practicing the identified habits, routines, and strategies in real life.

Tools are a critical foundation for coaching. Although they provide targeted solutions for specific challenges, you need more than just a generic list of tools. You will work with your coach to come up with your own customized toolkit that is practical and will work best for your specific lifestyle and workflow. You start by practicing new tools in coaching sessions before applying them independently in your day-to-day life.

WHY IT MATTERS

We know that practice only leads to progress when it is focused and purposeful. By connecting every practice session back to your action plan, you understand exactly why you are trying specific strategies. This helps you see how small, manageable efforts directly support your larger personal or professional goals, turning abstract ideas into concrete progress.



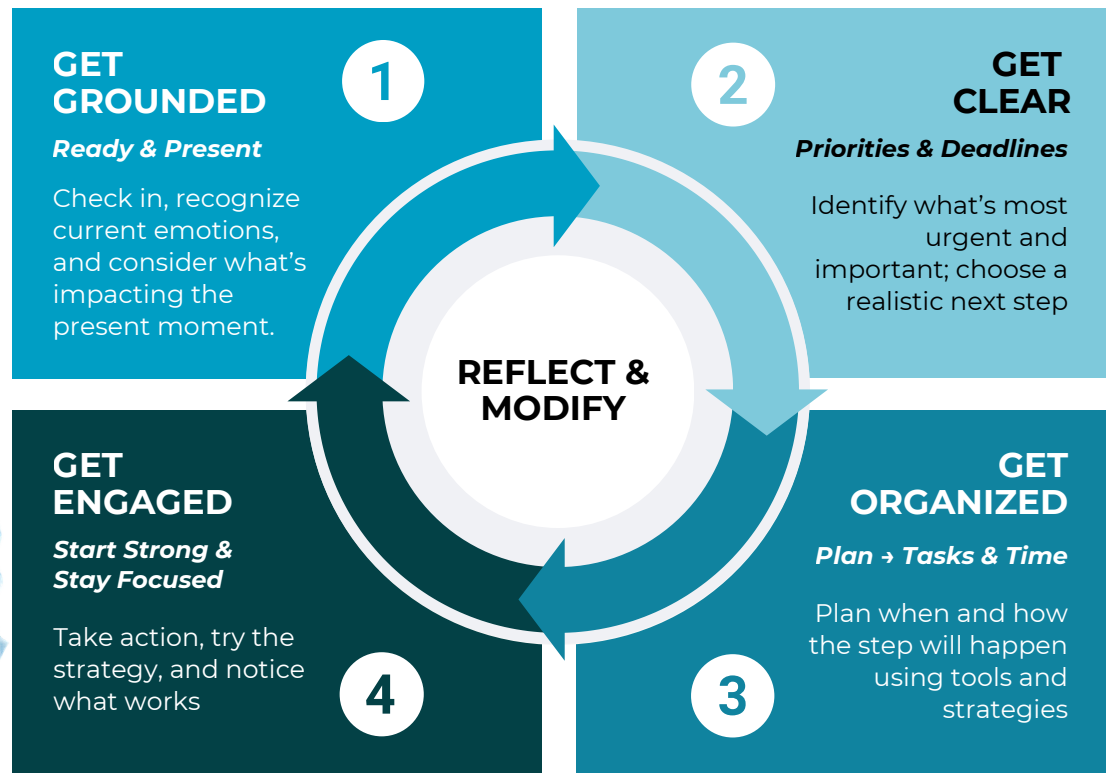
WHAT THIS LOOKS LIKE IN PRACTICE

Practice is guided, intentional, and reflective. In sessions, your coach introduces strategies by modeling how they work and helping you think through exactly when and where to use them. We pay close attention to fit, pacing, and readiness, adjusting expectations so practice feels achievable rather than overwhelming. We also use a consistent framework for our coaching sessions.

WHAT HAPPENS IN A SESSION

You might be wondering what actually happens during the time you spend with your coach. Every session follows a predictable flow and agenda that helps you create a consistent space to work on your action plan. This session flow is captured in the Beyond BookSmart Coaching Compass™ - a tool we use to guide our coaching sessions. It includes four stages that repeat in a helpful cycle:

The Coaching Compass is:



In addition to structuring each session, these steps help you build a process for approaching work that you can eventually use entirely on your own.

During sessions, we return to the Compass again and again to reflect on what's working, what needs support, and what the next helpful step is. **The goal isn't to be perfect - it's to learn how to navigate challenges, build confidence, and move forward one step at a time.** We also use a modified version of the Compass to structure each session. To learn more about the structure of a coaching session, visit page 2 of the appendix.

WHAT HAPPENS BETWEEN SESSIONS

Between sessions, you will apply the new strategies you've learned, which are connected directly to your action plan. Your coach will provide accountability by helping you name what you plan to try and checking in on how it went with curiosity rather than pressure. The goal here is consistent practice and learning—not perfection.

WHAT THIS LOOKS LIKE IN DAILY LIFE



AT WORK

After each session, practice is typically applied directly to your workflow - such as testing a new time-blocking method, breaking down a complex project brief, or establishing boundaries around your inbox.



AT HOME

Practice might look like independently applying a new routine for weekend meal prep, organizing household bills, or initiating chores with less friction and procrastination.

WHAT TO EXPECT ALONG THE WAY

As coaching progresses through this stage, you'll be actively building a personalized toolkit of Executive Function strategies to manage demands and moving toward reaching your priority goal. **We'll also keep track of small wins and proven strategies in our "Successful Insights" tracker.**



THE FORMULA FOR SUCCESSFUL COACHING

To see meaningful progress, coaching works best when sessions are consistent, focused, and supported over time. **See the next page to learn what creates real results:**



WHAT MAKES COACHING WORK



Weekly 45-minute sessions

Regular weekly sessions provide sufficient time for you to build momentum, practice skills, and address challenges before they pile up. Weekly frequency also supports habit-building and continued progress.



Small steps practiced consistently

Research in Executive Function and habit formation shows that small, repeated skills practiced over time lead to lasting change - not big changes all at once.



Steady accountability

Weekly check-ins create natural accountability, helping you stay engaged, follow through, and learn from what did or didn't work without long gaps between sessions.



Emotional regulation support

Meeting weekly provides space to process stress, frustration, and setbacks, which reduces overwhelm and helps you stay regulated when things get difficult.



Practice between sessions

You'll use strategies in daily life between sessions so that the next session can provide a safe place to talk through what helped and what needs to be adjusted.



Review, learn, and adjust

Progress isn't a straight line. Weekly coaching allows us to reflect on what's working, identify any obstacles, refine strategies, and make sure we're moving closer to your current priority goal.



Science supports repetition & spaced learning

Psychology research shows that skills grow through repeated practice and consistent reinforcement over time (known as "distributed practice"). Weekly coaching provides the exact spacing needed for learning to stick.



Progress builds over months, not weeks

Most clients work with a coach for several months or longer, since Executive Function skills develop gradually with consistent practice and support.

STEP 5: HIT YOUR GOAL

As you work with your coach in weekly sessions, you will make steady progress toward your priority goal, and you'll notice that things start getting easier. The clearest sign that you have reached your goal? You are consistently using the systems you've learned and applying them independently between sessions. What once felt like a daily struggle becomes manageable, and you realize you are handling new challenges with significantly less stress.

This step in the coaching journey is a deliberate pause in the coaching process to recognize success and make sense of how that success was achieved.

Your coach will help you connect your positive outcomes directly to your own effort, strategies, and choices. We reinforce the message that this progress wasn't an accident, a stroke of luck, or a fleeting burst of short-term motivation - it's because of your consistent effort to follow through on the action plan



WHY IT MATTERS

We believe that progress becomes most powerful when it is understood. Naming your progress helps shift your confidence from "I got lucky" to "I know exactly what I did and why it worked". This strengthens your internal motivation, reinforces learning, and helps you see yourself as fully capable of creating change. Crucially, this deliberate pause also prevents us from moving on to the next challenge too quickly, ensuring that new skills have had time to truly consolidate into lasting habits.

WHAT THIS LOOKS LIKE IN PRACTICE

Once progress is tangible and sustained, you and your coach intentionally revisit the original priority goal and what success was meant to look like. Together, you'll identify which strategies, routines, or habits supported that progress and reflect on how your effort, consistency, and adjustments contributed to the results.

We ask you to notice what now feels easier, more automatic, or less effortful than it did before. By supporting you in articulating what changed - not just that something changed—we help turn your experience into insight. This creates a clearer understanding of what worked and strengthens your confidence in your ability to create lasting change through effort.



If you have chosen to share your coaching journey with a partner, spouse, or even a supportive manager, this is a great time to share these wins with them to reinforce your positive results and the work you've put in

STEP 6: REFLECT & RAISE THE BAR

Now that your priority goal has been reached, it's time to reflect on your progress and build on your success. For most of our clients, the first priority goal is just the beginning. **The next step focuses on using established skills, routines, and strategies to take on new, more complex, or less familiar challenges.** This specific step within the coaching journey is designed to give space to determine how progress can be continued and sustained most effectively.

WHY IT MATTERS

As we mentioned earlier, small changes can snowball into a big transformation. Although reaching your first priority goal is a huge achievement worth celebrating, in the scheme of your long-term personal and professional development, it's just one step in a longer growth journey toward realizing your full potential. Your coach is here to help you take that next big step.

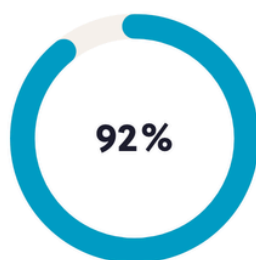
WHAT THIS LOOKS LIKE IN PRACTICE



If you feel there is more you'd like to accomplish, your coach will help you identify the next priority goal that stretches your skills without overwhelming you. This new priority goal might involve:

- ★ Increasing the complexity of the original goal
 - ★ Applying the same strategies to a new area of life
 - ★ Managing more responsibilities at once
 - ★ Planning further ahead or with less structure
-

To decide on this next goal, your coach will organize another Goals and Alignment meeting to narrow down your focus. Once that new goal is chosen, your coaching journey will cycle through the prior steps again (i.e., planning the work, working the plan, hitting the goal).



Feel highly satisfied with coach responsiveness



Keep working with their first coach match



Feel satisfied with their coaching progress



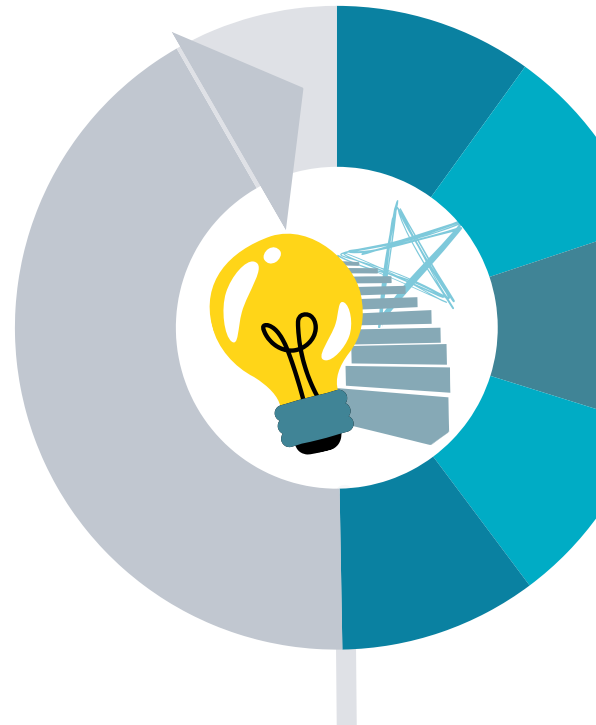
Find their coaching sessions helpful

WHY THE REPETITION

Developing Executive Function skills is a process that takes time and consistency, much the same as any ability you may want to improve.

Can you imagine, for example, achieving a goal of playing the piano or running a marathon without committing to ongoing practice and setting incremental goals along the way?

For our coaching program, the end goal is always strong self-efficacy - i.e. an unshakable belief in your ability to complete a task or achieve a goal if you put in the effort. Achieving this takes more than good intentions - it requires sustained proof of being able to set a goal, make a plan, and follow through. For this reason, our program is designed to flex that muscle. The more times that you cycle through the steps, the stronger your self-efficacy will become.



WHEN IT'S TIME TO MOVE ON



Once you're feeling more confident, independent, and capable as a result of hitting your priority goal(s), it may be time to consider transitioning to the final step of the coaching journey.

STEP 7: OWN YOUR GROWTH

In this final step of the coaching journey, you take primary ownership of your strategies, routines, and decision-making. However, we don't end support abruptly. Instead, coaching gradually tapers as you demonstrate you are ready to plan, adapt, and follow through more independently. The focus shifts from active coaching to preparing for sustainable independence - helping you feel confident using your skills on your own and knowing exactly how to respond when new challenges arise.

WHY IT MATTERS

The ultimate goal of coaching is confidence, capability, and independence - never dependency.

This step ensures you leave coaching not only having made progress but understanding how to continue applying your skills without our ongoing support. It's about helping you develop trust in your own judgment and systems, which supports long-term growth far beyond your time with us.



WHAT THIS LOOKS LIKE IN PRACTICE

Coaching becomes lighter and more directed by you. Instead of relying on your coach for prompts, you increasingly choose which strategies to use and when, plan ahead independently, and adjust as circumstances change. You begin to recognize early signs that something isn't working and make proactive changes on your own.

Naturally, our support shifts to match this growth. This might look like reduced session frequency, periodic check-ins focused on preparing for independent use of skills, or conversations about how to navigate future challenges without regular coaching. The transition is always intentional and collaborative, ensuring that you feel supported and prepared rather than scared and uncertain.



SO WHAT'S NEXT?

You leave coaching prepared to manage your responsibilities independently, equipped with reliable habits, personalized tools, and confidence in your ability to adapt as life changes. You understand how to use what you've learned and, just as importantly, when to seek support again if needed.

[Start Your Coaching Journey.](#)



20 years
of service



15,000+
lives changed



250,000+
hours coached

Read on to get a better sense of an initial coaching timeline...

TIMELINE FOR STARTING COACHING



TODAY

- Complete the needs assessment to help us understand your unique strengths, challenges, and preferences (either via our website form or an inquiry call)
- We'll use your answers to start the process of identifying the best-fit coach based on your needs

BEFORE THE FIRST SESSION

- You'll be matched with an expert coach selected specifically for you
- You schedule the first session (the "Goals and Alignment" meeting)

IN THE FIRST SESSION

(GOALS AND ALIGNMENT MEETING)

- Your coach reviews your needs assessment and prepares an agenda
- You and your coach meet for a video call
- You'll collaboratively determine a priority goal for coaching
- You'll set up a recurring time and cadence for weekly coaching sessions

IN THE SECOND SESSION

- Your coach will draft a personalized action plan for your priority goal ahead of time
- You and your coach collaborate to finalize the action plan for the priority goal
- You'll commit to a specific, achievable first step for the week ahead

WITHIN 30 DAYS OF WEEKLY SESSIONS

- You incorporate small changes into your week that gradually build into lasting habits.
- Your coach introduces practical tools and strategies to help you reach your priority goal.
- Your coach will provide supportive accountability and guidance as you begin to work toward your priority goal

ONGOING SESSIONS

- You'll build self-awareness, self-compassion, and self-motivation while navigating real-world challenges.
- You'll reflect on your progress, and your coach adjusts the approach based on what is or isn't working.
- Once the first priority goal is reached, you can raise the bar by choosing a new goal to tackle

[Start Your Coaching Journey.](#)

APPENDIX 1

The Transtheoretical Model (TTM)

The premise of the transtheoretical model is that progress is not a straight line. Most people change in stages, stops, and resets along the way.

TTM is used in coaching because it provides a realistic understanding of change—especially for executive function challenges.

Clients often come into coaching believing they “should” be able to change quickly, or that motivation should feel consistent every day.

In coaching, we use the TTM to:

- normalize that change is a **process**, not a switch
- understand a client’s **current mindset**
- tailor coaching strategies to match what they’re ready for **right now**
- reduce shame, frustration, and unrealistic expectations

TTM Stages of Change:

1) Precontemplation (Not Ready Yet)

Client mindset: Doesn’t see a need to change (or doesn’t want to).
May say/feel: “This isn’t a problem.” / “I don’t care.” / resistant, shut down.

2) Contemplation (Thinking About It)

Client mindset: Aware of the issue, but unsure or not committed.
May say/feel: “I know I should...” / conflicted, stuck, frustrated.

3) Preparation (Getting Ready)

Client mindset: Willing to try—needs clarity and a plan.
May say/feel: “What’s the first step?” / hopeful, nervous, motivated.

4) Action (Actively Changing)

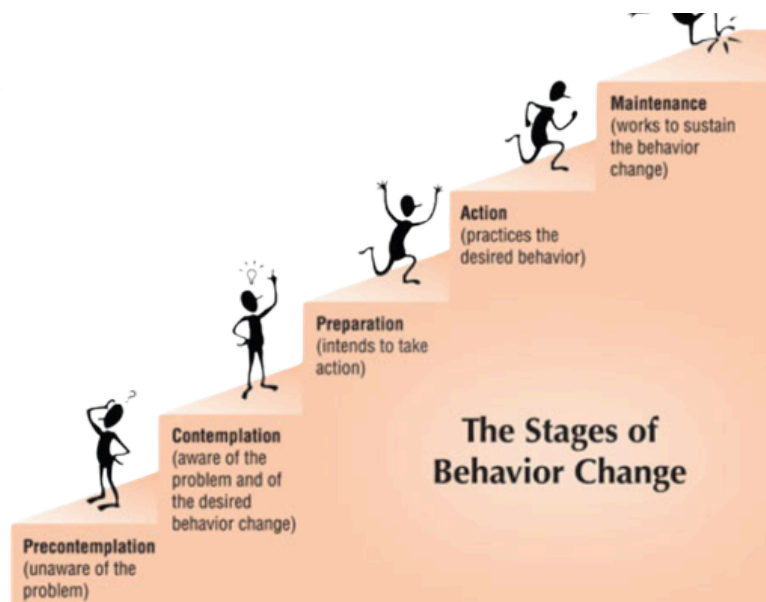
Client mindset: Trying strategies and practicing new behaviors.
May say/feel: “I’m doing it but it’s hard.” / effortful, proud, inconsistent.

5) Maintenance (Keeping It Going)

Client mindset: Building consistency and protecting progress.
May say/feel: “This is becoming routine.” / confident, steady, mindful of slipping.

**Reset / Recalibration (Normal Part of Change)

Client mindset: A setback happens—needs adjustment, not shame.
May say/feel: “I fell off.” / discouraged, overwhelmed, needing support.



APPENDIX 2



WHAT A TYPICAL WORKSMART COACHING SESSION LOOKS LIKE:

01

WE GET GROUNDED

Before diving into tasks, we pause to connect and understand your current headspace and emotional state. After all, a stressed brain can't learn effectively. By first assessing how you're feeling, your coach will adjust their approach accordingly to help you ease into the session.

02

WE REFLECT & REFINE

We review the past week with curiosity, not judgment. We celebrate wins, unpack challenges, and adjust our action plan as needed. If something did not work, we treat it as data, not a failure. Strategies that are working are reinforced. Those that are not are simplified, adjusted, or paused. This reflection helps refine both the current session and the long-term action plan.

03

WE GET CLEAR

Together, we identify what's most important for the week ahead and determine how the session can help. If there's something urgent, we thoughtfully decide whether it should take focus. Your coach will always connect weekly demands back to the overarching priority goal.

04

WE GET ORGANIZED & ENGAGED

Once we determine the session's focus, we help you identify the materials, tools, and strategies that will make the task easier. The rest of the session is active and hands-on, applying systems that help you overcome challenges and make meaningful progress toward your priority goal.

05

WE COMMIT & REVIEW

We close by defining what success looks like before the next session. Your coach provides a brief recap outlining key takeaways, anticipated obstacles, and clear commitments for you to work on throughout the week. To help keep you on track, you can also plan check-ins with your coach in between sessions as needed (typically a text or short phone call).

0

98%

of WorkSmart Coaching clients find their coaching sessions are helpful