



uplevel's starter kit.

EVERYTHING YOU NEED TO KNOW TO START
YOUR MINDSET TRANSFORMATION PROCESS.

WELCOME TO A NEW LEVEL.





**review the step-by-step
process of our program.**



step by step of the mindset transformation process.

These are the steps we will cover during our work together

1. Kick-off meeting

We get to know each other, and set up work goals. We go over things like work rules, contract, tools, and your brand new Development Dashboard (our favorite!)
If you have any questions about how the coaching process looks like, we cover that too.

2. Assessment

We send a 360 evaluation to a selected group of your stakeholders. Through this assessment, we obtain key information that will help us create your very own Success Roadmap.

3. Success Roadmap

We create your personalized success plan, that includes the insights received through your 360 assessment as well as your inputs.
This step also includes tailored mindset transformation tools & techniques hand-picked just for you.

4. Coaching & FollowUP Plan

This is the heart of the program. Through one-on-one weekly sessions plus the techniques that we share with you, you will go from great to extraordinary

5. Post Assessment

After the coaching process, we send another 360 assessment to the same key stakeholders to evaluate your before/after results.
You receive a final report with your pre/post results, plus additional resources to continue your journey to achieve greatness.

your development dashboard.

where we put the mindset
transformation steps into action

we have video tutorials for you!
go to our [**development dashboard site**](#) and scroll
down to “how to videos” to check them out!



make sure to

read & accept

**our work manifesto and
terms & conditions**



work manifesto.

This is us

- We are creating a unique success recipe just for you.
- We match your commitment and then add some more.
- We have more than a decade of experience working with leaders, and we are ready to put all of what we know at your service.

This is you

- You need to make this a priority: be on time, put in the work, focus on your goals.
- You must be open and transparent: be vocal about what is not working, and accept feedback.
- You have to dare to change: be willing to step out of your comfort zone.

REMEMBER THAT NOTHING WORKS, UNLESS YOU DO



terms and conditions

1. Coaching is **partnership** (defined as an alliance, not a legal business partnership) **between the Coach and the Client** in a thought-provoking and creative process that inspires the Client to maximize personal and professional potential.
2. The Client is **solely responsible** for creating and implementing his or her own physical, mental and emotional well-being, decisions, choices, actions and results arising out of or resulting from the coaching relationship.
3. The Client understands **coaching is not therapy** and does not substitute for therapy if needed, and does not prevent, cure, or treat any mental disorder or medical disease
4. The Client understands that in order to **enhance the coaching relationship**, the Client agrees to communicate honestly, be open to feedback and assistance and to create the time and energy to participate fully in the program
5. All **meetings must be scheduled through the Calendar on UpLevel Website**. All sessions will be delivered via video conference, using Zoom, MS teams, MS Skype, or any other video conferencing platform. The length of sessions shall be sixty minutes, unless previously agreed on exception. The Client and UpLevel commit to show on time to each session, and attend the session on a private place, with adequate internet connection.
6. UpLevel reserves the right to cancel the session and keep the Client payment without a reschedule option if the Client **does not attend the session or is late fifteen minutes or more**. If the Client notifies that he or she would be late at least fifteen minutes before session, UpLevel will reschedule the meeting without any additional charges once. If the Client continues cancelling sessions, UpLevel reserves the right to keep the Client's payment without further rescheduling options.



terms and conditions

7. UpLevel will notify the Client of any reschedule requests on UpLevel's side at least **four hours before session**. Failure to do so, grant the Client an additional session free of charge plus the reschedule of the already paid session. UpLevel will be considered a successful notification to the Client by using the Client's contact information: email, direct messaging and/or phone number. Any notification from UpLevel to either communication channel mentioned before will be considered valid.
8. This coaching relationship, as well as all information (documented or verbal) that the Client shares with UpLevel as part of this relationship, is bound by the principles of confidentiality between Coach and Client. However, please be aware that the **Coach-Client relationship is not considered a legally confidential relationship** (like the medical and legal professions) and thus communications are not subject to the protection of any legally recognized privilege.
9. If the Client is in a process through his or her Employer, the Client understands that departments such as Human Resources will receive a report from UpLevel to validate the work that has been performed. **If UpLevel receives information that the Client could be committing any actions contrary to the Employer's code of conduct, or country's legislation, UpLevel is obliged to report this to the Employer.**
10. If the Client is part of Employer contract, Employer **failure to comply with the due payments will result on immediate termination of services from UpLevel.**
11. If the Client conducts him or herself in a **threatening, disrespectful, discriminatory or harassing manner against UpLevel**, that entitles UpLevel to immediate termination of services without any refund arrangements for the Client.

A grayscale photograph of a hand holding a smartphone, positioned in the upper left quadrant of the frame. The background is blurred, suggesting an indoor setting. Two large, solid red rectangular blocks are positioned on the right side of the image, one above and one below the central text box.

**would you like to
take us with you?**



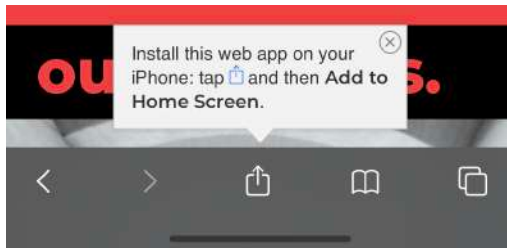
install our web app so you don't miss a thing (mobile instructions)

Safari (iOS)

1. Open Safari on your iPhone or iPad and search uplevel.services
2. Click on the share icon at the bottom of browser.

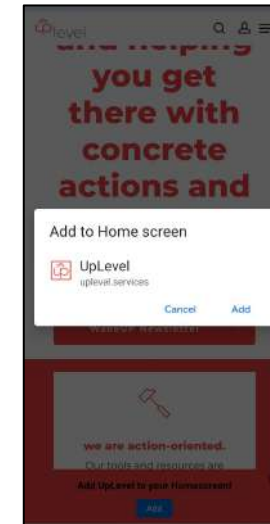


3. Scroll down to until you read **"Add to Home Screen"**
4. Click on **Add**
5. You can also do the same through our pop-up:



Chrome (Android)

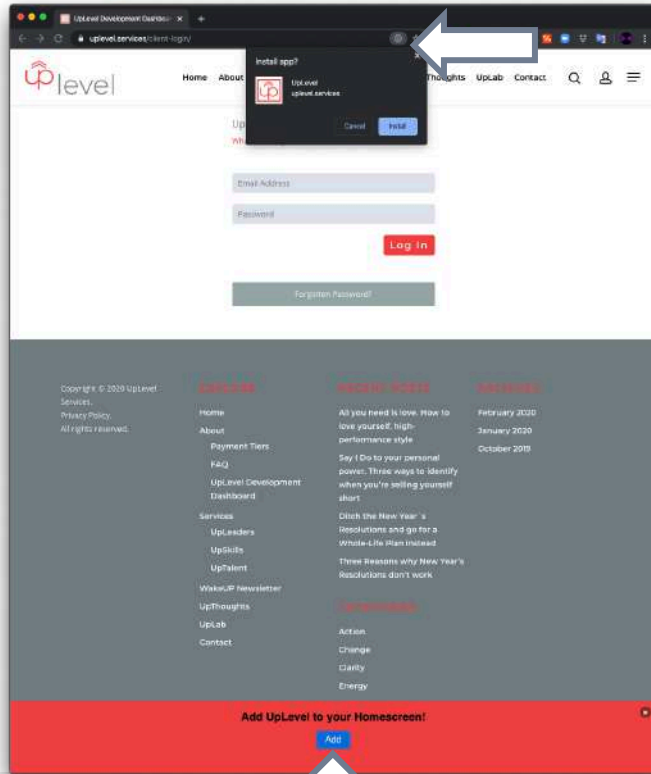
1. Open Chrome on your mobile and search uplevel.services
2. Scroll down until you read **"Add UpLevel to your Homescreen"**
3. Click on **Add**



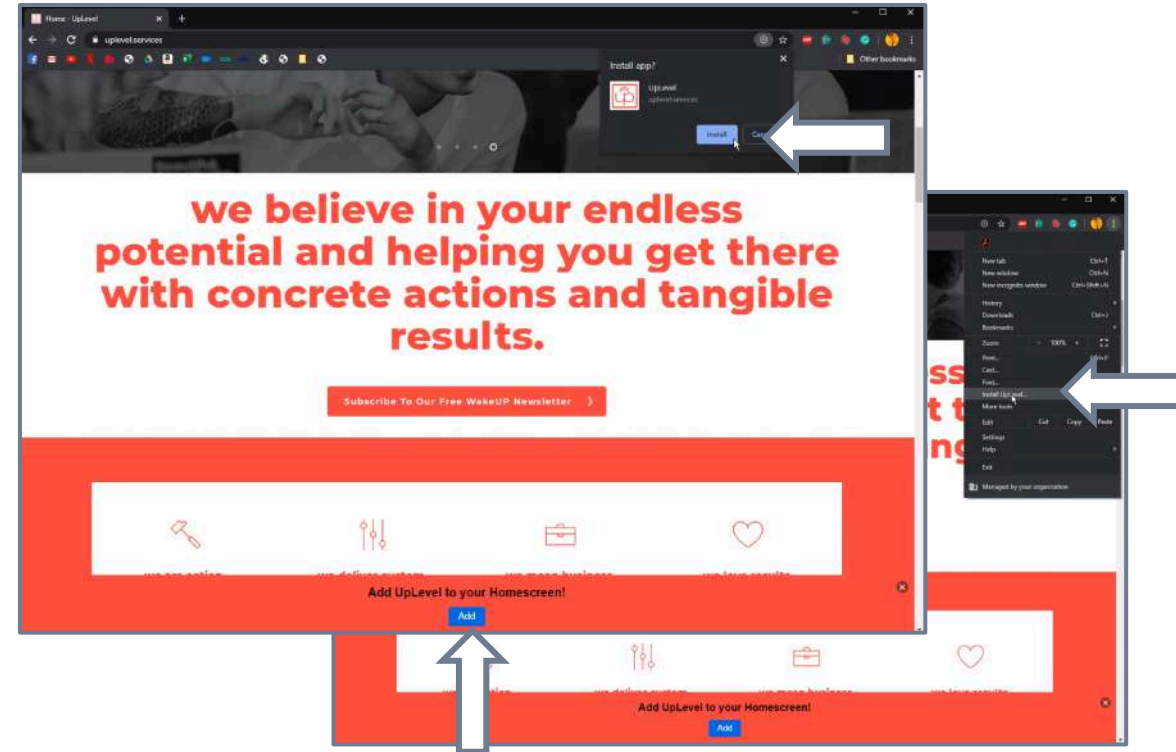


install our web app so you don't miss a thing (desktop instructions)

Google Chrome (MacOS)



Google Chrome (Windows)





how to book your sessions.

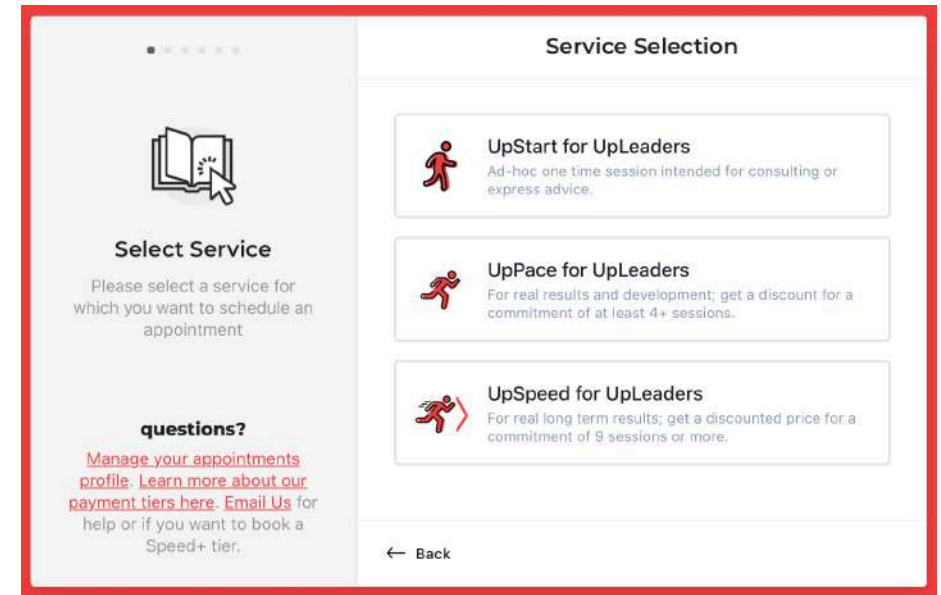
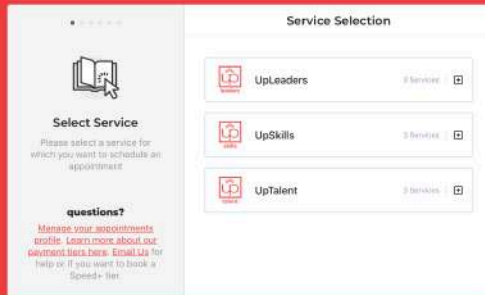


step by step to book your sessions

Go to our home page, scroll down and find our virtual agenda

Select your program and your plan's tier

let's schedule some time together.



For Corporate Clients: You will receive a separate email with the program & tier information that you need to select.



step by step to book your sessions

Find a day & time that works for you

Complete your information.

Tip: you can always login with your Google ID.

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Date & Time Selection

February 2020

MON	TUE	WED	THU	FRI	SAT	SUN
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	1

SELECTED 05:00 pm - 06:00 pm Appointment Time For February 27

5 PM	6 PM	7 PM	8 PM
■	■	■	■

← Back Next Step →

questions?
[Manage your appointments profile.](#) [Learn more about our payment tiers here.](#) [Email Us](#) for help or if you want to book a Speed+ tier.

Times are in: America, New York

SUMMARY

SERVICE	DATE
UpSpeed for UpLeaders	February 27
TIME	TOTAL PRICE
05:00 pm - 06:00 pm	\$150

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Customer Information

New Registration Already have an account?

Your First Name: Carolina
Your Last Name: Venegas
Your Phone Number: 88844878
Your Email Address: caro@uplevel.services

Add Comments:
Comments: I want to take my performance to the next level!

If you are an UpLevel Enterprise client, what is your company name?

OR

[Login with Google](#)

← Back Next Step →

questions?
[Manage your appointments profile.](#) [Learn more about our payment tiers here.](#) [Email Us](#) for help or if you want to book a Speed+ tier.

SUMMARY

SERVICE	DATE
UpSpeed for UpLeaders	February 27
TIME	CUSTOMER
05:00 pm - 06:00 pm	Carolina Venegas
TOTAL PRICE	\$150



step by step to book your sessions

Important! If you are part of a Corporate Client program, you **DO NOT** have to enter your credit card information. See below.

Take one final look at the information and click on **Submit**

Your Payment Information

Click the button below to pay using PayPal
You will be able to verify your booking information and confirm it before submitting the payment on the next step.

Payment Method
You can either pay online using your credit card or PayPal, or you can pay on arrival with cash

questions?
[Manage your appointments profile](#), [Learn more about our payment tiers here](#), [Email Us](#) for help or if you want to book a Speed+ tier.

Powered by **PayPal**

Total booking price: **\$150** [Have a coupon code?](#)

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SUMMARY	
SERVICE	DATE
UpSpeed for UpLeaders	February 27
TIME	CUSTOMER
05:00 pm - 06:00 pm	Carolina Venegas
TOTAL PRICE	
\$150.00	

For Corporate Clients: on a separate email you will receive an exclusive coupon that will allow you to book your sessions without charges.

Once you have your coupon, click the **"Have a coupon code?"** option and enter the code there. Please note coupons are case sensitive so you need to type it exactly as you received it from us. Hit Enter, and **the charge will go to \$0.**

Verify Booking Details

Double check your booking information, you can go back to edit it or click submit button to confirm your booking.

appointment info

- DATE: February 27, 2020
- TIME: 05:00pm - 06:00pm
- SERVICE: UpSpeed for UpLeaders

customer info

- NAME: Carolina Venegas
- PHONE: 88844878
- EMAIL: caro@uplevel.services
- TELL ME MORE ABOUT THE GOAL OF OUR CONVERSATION: I want to take my performance to the next level!
- IF YOU ARE AN UPLEVEL ENTERPRISE CLIENT, WHAT IS YOUR COMPANY NAME?: n/a

payment info

- PAYMENT METHOD: PayPal
- CHARGE AMOUNT: \$150.00

Verify Order Details
Double check your reservation details and click submit button if everything is correct

questions?
[Manage your appointments profile](#), [Learn more about our payment tiers here](#), [Email Us](#) for help or if you want to book a Speed+ tier.

← Back **Submit** →



step by step to book your sessions

See the submission confirmation; here you can add the session to your preferred calendar or open the QR code to save the event in your phone, just open up the camera app in your phone & point towards it.

...And wait for the final confirmation!

Appointment Confirmation

CONFIRMATION #:
12

[Add to Calendar](#) [Print](#) [SHOW QR CODE](#)

appointment info

• DATE: February 27, 2020 • TIME: 05:00pm - 06:00pm

• SERVICE: UpSpeed for UpLeaders

customer info

• NAME: Carolina Venegas • PHONE: 88844878

• EMAIL: caro@uplevel.services • TELL ME MORE ABOUT THE GOAL OF OUR CONVERSATION: I want to take my performance to the next level!

• IF YOU ARE AN UPLEVEL ENTERPRISE CLIENT, WHAT IS YOUR COMPANY NAME?: n/a

Did you know that you can create an account to manage your reservations and schedule new appointments?
[Create Account](#)

Confirmation
Your appointment has been successfully scheduled. Please retain this confirmation for your record.

questions?
[Manage your appointments profile](#). [Learn more about our payment tiers here](#). [Email Us](#) for help or if you want to book a Speed+ tier.

You will receive an email from us letting you know that we received your request and **once your coach has approved your session** you will receive a **second email with the final acceptance and the session's videoconference link.**

Make sure to check your spam folder in case our emails went there 😊

You can always [Manage here your appointments profile](#) (different than the Development Dashboard login) & [learn more about our payment tiers here](#).

let's start this journey together

For more information, visit our site or send us an email to hello@uplevel.services