



The Business Builder Program For Coaches

Course Workbook



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THIS WORKBOOK IS INTERACTIVE

This workbook has been designed with fillable interactive elements for you to get the most out of your learning experience.

- Links are sprinkled throughout the text which are highlighted [like this](#) (as an example)
- Fillable content has been made to put your thoughts down in the same place with ease
- There are 'yes or no' checklists for you to interact with throughout this course.



Introduction

Welcome to **The Business Builder Program** specifically created for coaches!

Whether you're just starting out as a coach or you've been meeting with clients for some time, you're at the point now where you're serious about wanting to start your own coaching business. Perhaps you're thinking about it as a side hustle so that you have a way to do work you love, but also continue with other work or employment commitments. Maybe you're at a different stage and have decided that you would like to branch out on your own and start a full-time coaching business. Either way, this course is designed to give you the tools and the confidence to successfully launch your coaching business.



Introduction

About This Course

There are **six modules** in this online course. Each module contains essential content to help you identify and address the key elements of the small business start-up phase. The exercises within the workbook are designed to help you explore areas that you might not have considered necessary and methods to ensure your business is launched in a sustainable and efficient way.

Please note that coach training and how to conduct a coaching session is outside of the scope of this program.

If you are interested in learning more about coach training, please contact our **Admin Team** for details.



Introduction

What You'll Learn

In this course, you'll discover what may be holding you back from starting your business. You'll gain insight into how to shift your mindset about success and prosperity. You'll learn the basics of establishing your coaching business as well as the value of market research and marketing yourself as a coach. With the guidance of a knowledgeable and experienced professional coach instructor, you'll gain access to tools and resources that shorten your learning curve and keep you pointed toward your **North Star goals** – the key metrics that help you define your success and that are anchored in your core values.

This course is offered as a stand-alone program. If you attend all six weeks of the course, you will receive a certificate of completion that you may be able to use for applicable continuing education credits. (Please check with your industry association to verify CE credits).



Introduction

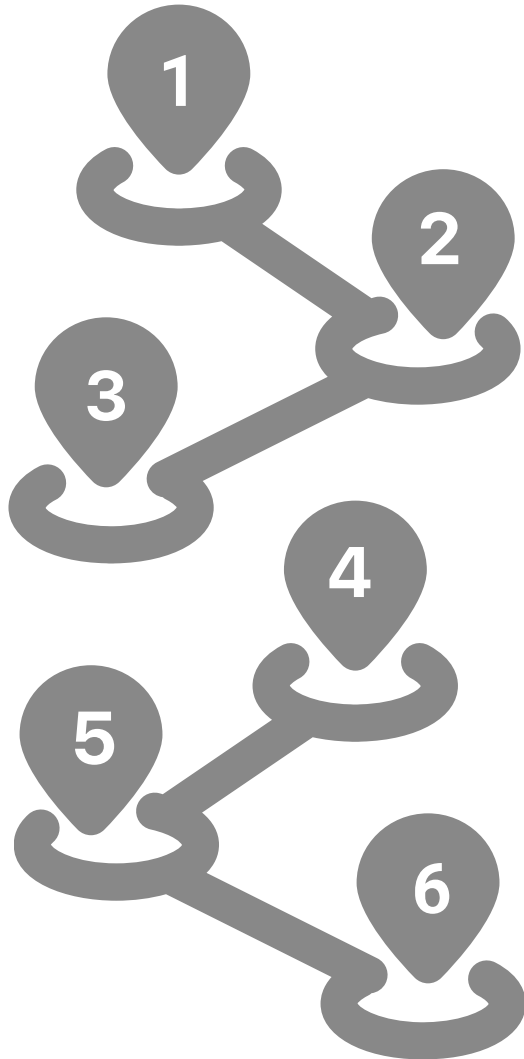
We're Here to Help!

At any point, if you have questions about this program or other programs we offer along your journey with us, please reach out to our Admin Team for more information.

We wish you much success during your learning experience with us! If you have any questions about the course, please feel free to reach out to us at any time.



The Roadmap



1. Purpose
2. Psychology
3. Preparation
4. Product
5. Process
6. Presence

***“I didn’t get there by wishing for it or hoping for it,
but by working for it.”***

— Estee Lauder



Before The First Class

You may be wondering if there is anything to prepare in advance of starting Week 1.

Yes, **there is pre-work to ground you** for the start of your journey.

Please take at least 30 minutes to 1 hour of uninterrupted time to complete the following course pre-work.



Pre-Work Exercise

Identify **3 to 5 reasons** why you want to start your coaching business.

1

2

3

4

5



Pre-Work Exercise

**What excites you about starting
your coaching business?**

**What scares you about starting
your coaching business?**



Pre-Work

Core Values Exercise

Take some time to get familiar with the Learning Portal. You can find the [Core Values Exercise](#) under Course Materials. Download the **exercise and complete** it before the first class. Come prepared to share your work.



Pre-Work

Determine Your Core Values

From the list below, choose and write down every core value that resonates with you. Do not overthink your selection. As you read through the list, simply write down the words that feel like a core value to you personally. If you think of a value you possess that is not on the list, write it down.

Abundance	Dedication	Kindness	Professionalism
Acceptance	Dependability	Knowledge	Punctuality
Accountability	Diversity	Leadership	Relationships
Achievement	Empathy	Learning	Reliability
Adventure	Encouragement	Love	Resilience
Advocacy	Enthusiasm	Loyalty	Resourcefulness
Ambition	Ethics	Making a Difference	Responsibility
Appreciation	Excellence	Mindfulness	Responsiveness
Attractiveness	Expressiveness	Motivation	Security
Autonomy	Fairness	Optimism	Self-Control
Balance	Family	Open-Mindedness	Selflessness
Being the Best	Friendships	Originality	Simplicity
Benevolence	Flexibility	Passion	Stability
Boldness	Freedom	Performance	Success
Brilliance	Fun	Personal Development	Teamwork
Calmness	Generosity	Proactive	Thankfulness
Caring	Grace	Professionalism	Thoughtfulness
Challenge	Growth	Quality	Traditionalism
Charity	Happiness	Recognition	Trustworthiness
Cheerfulness	Health	Risk Taking	Understanding
Cleverness	Honesty	Safety	Uniqueness
Community	Humility	Security	Usefulness
Commitment	Humor	Service	Versatility
Compassion	Inclusiveness	Spirituality	Vision
Cooperation	Independence	Stability	Warmth
Collaboration	Individuality	Peace	Wealth
Consistency	Innovation	Perfection	Well-Being
Contribution	Inspiration	Playfulness	Wisdom
Creativity	Intelligence	Popularity	Zeal
Credibility	Intuition	Power	
Curiosity	Joy	Preparedness	
Daring		Proactivity	
Decisiveness			



Pre-Work

Determine Your Core Values

Group all similar values together from the list of values you just created. Group them in a way that makes sense to you, personally. Create a maximum of five groupings. If you have more than five groupings, drop the least important grouping(s). See the example below.

Abundance Growth Wealth Security Freedom Independence Flexibility Peace	Acceptance Compassion Inclusiveness Intuition Kindness Love Making a Difference Open-Mindedness Trustworthiness Relationships	Appreciation Encouragement Thankfulness Thoughtfulness Mindfulness	Balance Health Personal Development Spirituality Well-Being	Cheerfulness Fun Happiness Humor Inspiration Joy Optimism Playfulness
--	--	--	--	--

Insert your lists below

--	--	--	--	--

Choose one word in each grouping that represents the label for the entire group and **circle it**. Again, do not overthink your labels. There are no right or wrong answers. You are defining the answer that is right for you. See the example below.

Abundance Growth Wealth Security Freedom Independence Flexibility Peace	Acceptance Compassion Inclusiveness Intuition Kindness Love Making a Difference Open-Mindedness Trustworthiness Relationships	Appreciation Encouragement Thankfulness Thoughtfulness Mindfulness	Balance Health Personal Development Spirituality Well-Being	Cheerfulness Fun Happiness Humor Inspiration Joy Optimism Playfulness
--	--	--	--	--



Pre-Work

Add a Verb to Each Value

Discover what it looks like to make each verb you circled an actionable core value.

For Example

Live in *freedom*
Seek opportunities for *making a difference*
Act with *mindfulness*
Promote *well-being*
Multiply *happiness*

Write Your Examples Here

Use these statements to help remind you and guide you to live more purposefully.

Lastly, write your core values in order of priority below. Post this list somewhere they are available as an easy reference when you are faced with decisions.

For Example

1. Live in *freedom*
2. Act with *mindfulness*
3. Promote *well-being*
4. Multiply *happiness*
5. Seek opportunities for *making a difference*

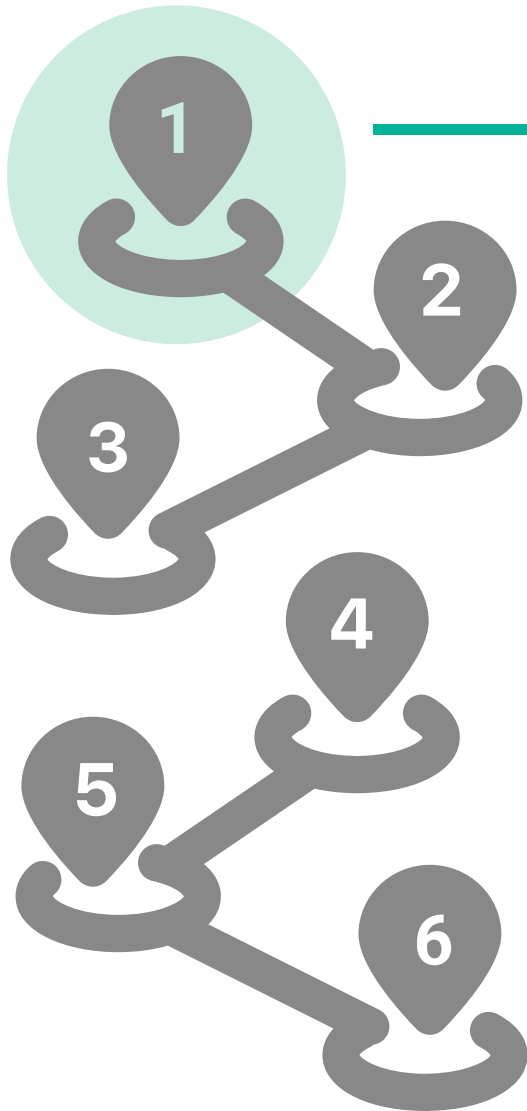
Write Your Examples Here

Take space for any additional thoughts before you embark on this course here



The Roadmap

Module One: Purpose



1. PURPOSE

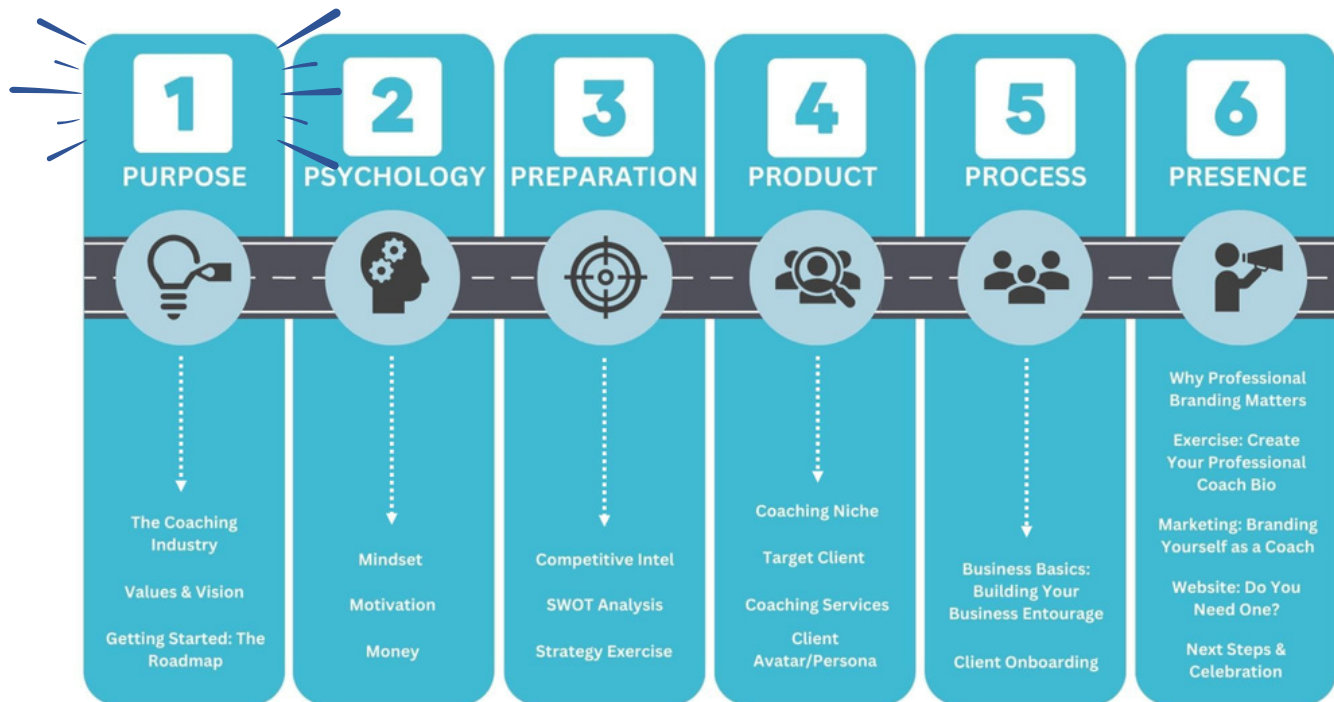
- The Coaching Industry
- Values and Vision
- Getting Started
 - The Roadmap

MODULE ONE offers a course introduction along with an exploration of the current state of the coaching industry, the phases of business growth, and the importance of establishing a purpose and core values when starting a business.



1 MODULE ONE

PURPOSE



ABOUT THE COACHING INDUSTRY

Without **learning the basics of building a business**, the challenge of launching a sustainable coaching practice may be daunting. Even with the estimated global market value from coaching at over \$15.2 billion in 2023 (up almost \$3 billion since 2019), the reality is that less than 24% of coaches can't sustain themselves and focus on coaching full-time without learning the basics of building a business. By taking this course, you're ensuring that you're prepared to put in the work to build a business that is intentional, efficient, sustainable, and anchored soundly in your **core values**.

[Paperbell: Coaching Life Industry Statistics](#)

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1 MODULE ONE

Coaching Models

According to IBISWorld's annual report on the coaching industry, it will continue to benefit from increasing levels of disposable income. **This means that there is room for you in the coaching space.**

It is important to consider the type of coaching model you are offering. There are **three types** to consider:

1

External Coach
Practitioner

2

Internal and External
Coach Practitioner

3

Internal Coach
Practitioner

Which one
do you
want to
be?



1 MODULE ONE

Types of Coaching Services

Another important consideration is the business mix you're planning on offering. Give some thought during this course to the type of coaching services you will offer your clients.

- Individual Coaching Services
- Group Coaching
- Team Coaching
- On-Demand Programming (Videos, E-Courses)
- Passive Revenue Products (Workbooks, E-Books, Cards)
- Virtual Programs

Wheel of Small Business Mastery for Coaches

The Wheel of Life is a popular coaching tool. It has been adapted here to form the Wheel of Small Business Mastery to get you thinking about the complete context of business development. Consider where you are from a range of 1-5 with 1 being low and 5 being high in each of the following small-business elements.

Please download the Wheel of Small Business Mastery for Coaches from the Learning Portal under Course Materials.

We will make time during class to complete this exercise. It is helpful to review the Wheel on a quarterly basis to see where your areas of mastery may have shifted.



1 MODULE ONE

Four Phases of Business Growth

1 STARTUP

Getting your business up
and running

2 GROWTH

Scaling your business with
new clients and additional
financing

3 MATURITY

Stabilizing your
business
(E.g., Mergers &
Acquisitions)

4 RENEWAL OR DECLINE

Reinvigorating your
business or yielding to new
competition or
changing condition

This course is focused on the startup phase.

Your business is already here.

It began the moment you had a seedling of an idea.
This phase is one where you might find yourself in for
some time — even several years.



1 MODULE ONE

The Startup Phase

If you answer no to some or all of the following questions, you're probably in the startup phase.



Do you have enough clients to be viable?

YES

NO

Do you have enough resources to deliver your services and products on time?

YES

NO

Do your products and services compete with your competitors?

YES

NO

Is your business profitable?

YES

NO



1 MODULE ONE

The Startup Phase

"A small business is an amazing way to serve and leave an impact on the world you live in."

— *Nicole Snow*



1

MODULE ONE

The Startup Phase

The **startup phase** is where we deal with the most chaos and with owner self-doubt. This is the phase that requires a clear line of sight to your **North Star** so you can safely and confidently navigate your way through turbulence.

“The function of an ideal is not to be realized but, like that of the North Star, to serve as a guiding point.”

— *Edward Abbey*

Defining your **North Star Philosophy** is an integral way to boost your confidence during the start up phase. By identifying your North Star objectives or your aspirational goals to motivate, inspire, and keep you uplifted, you will be able to better navigate meteors of conflict, challenge, and change that may threaten to tilt you off course.

Take time to answer the following questions on the next page:





MODULE ONE

Your North Star Philosophy

What does your business do (what is your true value)?

Why are you in the business (what purpose do you serve)?

How will you ensure you can bring your 'why' to life in your business?

What will that look like?



1 MODULE ONE

Your North Star Philosophy

How do you want your clients to feel?

EXAMPLE

I help leaders identify their overall purpose and ambition. I support them to find and define their why...their North Star...which is a way to communicate and honour client promises and commitments. I ask my clients powerful questions to help them find inspiration and insights in ways they hadn't before considered.

"As a coach, you can help your client see their North Star and define it such that they are able to stay on course and find their way, no matter where they are."

— Susan Merli, PCC



1 MODULE ONE

Vision

It is essential to have a **vision** for your coaching business. It speaks to your goals and ideals and connects directly to your **North Star**. It will keep you focused on your long-term goals and your aspirations for the future. It is different from a **mission statement** which identifies what you do, how, and why you do it. Let's start the process of defining your **vision statement** by answering the following questions:

In the future (1 to 3 years) ...

Where do you want to be?

What are the target conditions?

What is your goal?

"Wouldn't it be fantastic if in one and/or in three years..."





MODULE ONE

Identifying Your True Value

Now, let's take the next step in this process and list the services you will offer as a way of identifying the true value you're bringing to your target client.

Service you offer	What is the value of this service?	Will this service provide secondary value?	What will your client receive?	Will the service give repeated value?
Example: individual coaching	Clients can take clear actions towards their goals	Greater confidence, better decision-making skills, improved time management	Virtual 60-min one-on-one coaching for a 3-month period with an ICF accredited external coach	Consistently deliver better presentations



1 MODULE ONE

In each module of this course, you'll be reminded to continue working on the completion of the Business Plan Questionnaire.

Question	Response	Research / More info required on...
Name of Business including address and contact info (email and phone)		
Website URL and any domains purchased		
Description of the Business		
Why does this business exist?		
What you offer		
Why you offer it		
Context or background about the business (what or who motivated you or inspired you)		

Some of the questions you will find easy to answer and others will take time to complete. Please download the [Business Plan Questionnaire](#) — which is located in the Course Materials section of the Learning Portal — and ensure you've read through all the components in the questionnaire.

By the end of this course, the goal will be for you to have completed the questionnaire which forms the basis of your coaching business plan.



1 MODULE ONE

On Starting

“Dream big.
Start small.
But, most of all,
start”

—Simon Sinek



1 MODULE ONE

Commitment Exercise

An idea to start a coaching business may feel like a secret you hold dear. It can be as fragile as a seedling growing on a windy coastal outcrop. To give it the light, sun, and protection it needs to thrive, you need to dedicate time to working on your business every week. The **hallmarks of any successful business** include perseverance, persistence, commitment, and consistency.

You can bring a greater intentionality to this process by answering the following questions:

How much time will you commit per week to build your coaching practice?

Identify who/what will inspire you when obstacles appear (mentor/coach/etc.,)

What will having a coaching business bring to your life?

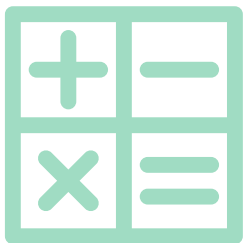
Fast forward to one year: You've launched your business! How do you feel?



1 MODULE ONE

Smartphone Calculator

Let's face it, there will be distractions and challenges along the way. For many, a primary distraction is the **smartphone**. To get a clear sense of how much time you're spending on your smartphone, please take a few minutes now to complete a **screen time calculator**. It is found in the Course Materials section of the Learning Portal. The objective of this exercise is to simply bring awareness to the areas of your life that are intentionally or unintentionally competing for your time.



Smartphone Screen Time Calculator

Supercharge Your Motivation

How Many Days Are You Spending on Your Phone?

- How many hours on average do you spend on your phone each day?
_____ hours _____ minutes
- Turn that into minutes.
(example: 2 hours and 15 minutes would be 135 minutes)
_____ minutes
- Multiply the number above by 7. This will give you the total minutes per week:
_____ minutes/week
- Next, multiply that number by 52. This will give you the total minutes per year spent on your phone:
_____ minutes/year
- Now divide it by 60 to see how that number transitions to hours:
_____ hours
- Lastly, divide that number by 24 so you can see how that translates into days:
_____ /day

Rather than judge your current habits, focus your efforts on ways you can redirect your time and energy toward the goal of launching your coaching business. You might be surprised at the amount of time you can gain back by reducing smartphone screen time!



1 MODULE ONE

The Pomodoro Technique

The **Pomodoro Technique** is a time management method that was developed by Francesco Cirillo. Originally, the concept was to use a kitchen timer to break work into intervals which were 25-minutes in length and were also separated by short five-minute breaks.

An interval is called a pomodoro which is the Italian word for tomato. Francesco Cirillo used a kitchen timer that was shaped like a tomato to practice his effective time management technique.

Try out the Pomodoro Technique while you work your way through this course workbook.



The Pomodoro Technique

- Work until the timer goes off
- Then take a 5-minute break
- Repeat the “Pomodoro another 3 times”
- Then take a 30-minute break



1 MODULE ONE

Believe

“Believe you can and you’re halfway there.”

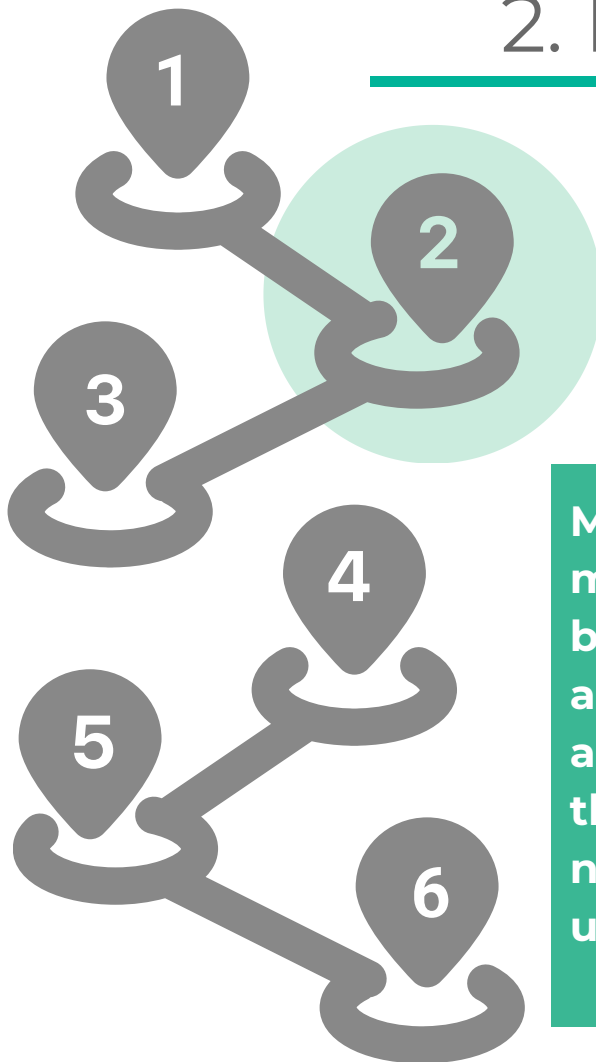
— Theodore Roosevelt



The Roadmap

Module Two: Psychology

2. PSYCHOLOGY

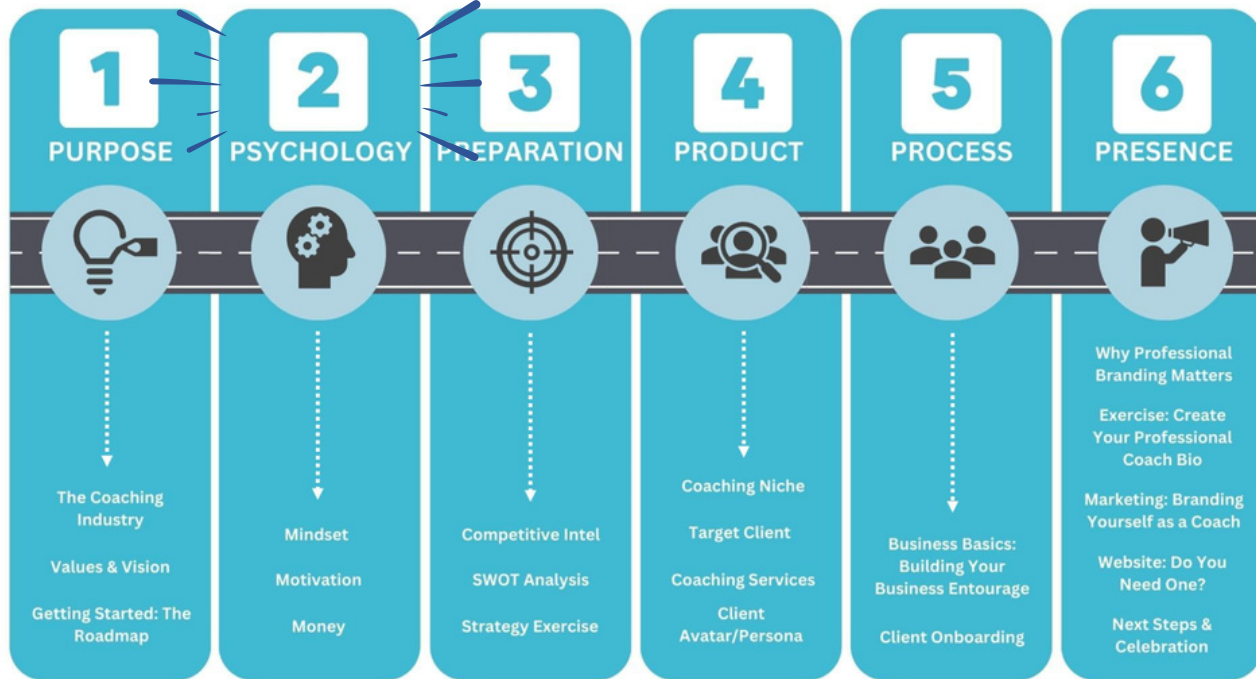


- Mindset
- Motivation
- Money

MODULE TWO is a deep dive into mindset and limiting beliefs about business, money, and success. We address ways to manage your time and establish sustainable habits that will help you successfully navigate common business start-up obstacles.

2 MODULE TWO

Psychology



Use the check boxes to select your answer

Are you feeling stuck or in a rut?

YES

NO

Are you feeling optimistic and hopeful?

YES

NO

Are you somewhere in between?

YES

NO

2 MODULE TWO

Your Purpose

What things are competing most for your productive time and focus?

What are the things you need to stop doing or delegate to create more focused time?

What prevents you from saying no and communicating your personal boundaries?

We all have a **unique purpose**. It is a combination of skills, talents, and inherent gifts that only you have. It's a powerful gift that you bring to the world and it's your responsibility to make sure you don't rob the world of that gift. Building self-confidence about your coaching business involves gaining self-awareness and addressing your fears, self-doubt, limiting beliefs, procrastination, and any other negative thoughts you have about yourself and your success.



2 MODULE TWO

Psychology

All these negative thoughts fuse together to form a barrier between who you are today, who you want to be, and who you need to be to achieve your highest potential.

For example

- *Fear of failure and doubt in my ability to achieve success and prosperity.*
- *Fear of being successful and the responsibility that comes with it, and disbelief in the amount of knowledge and experience I have in my field.*
- *Dealing with low self-esteem.*

Capture everything and anything that you think is holding you back
in the space provided



2

MODULE TWO

Positive Intelligence

You can replace negative thoughts by reframing them with positive thoughts and behaviours that motivate you to take action toward your business coaches.

COMPLETE THE POSITIVE INTELLIGENCE SABOTEURS SELF-ASSESSMENT

Please consider completing this quick self-assessment.
You will be emailed the results.

<https://www.positiveintelligence.com/#content-top>

ABOUT SHIRZAD CHAMINE

Shirzad is the author of the New York Times bestselling book, Positive Intelligence. Shirzad has lectured on Positive Intelligence® at Stanford University and has trained faculty at Stanford and Yale business schools. Shirzad has been the CEO of the largest coach training organization in the world. A preeminent C-suite advisor, Shirzad has coached hundreds of CEOs and their executive teams. His background includes a BA in psychology, an MS in electrical engineering, and an MBA from Stanford.

**Create Your Believable Daily
Mantras**

Sit with yourself

**Have quiet time or turn on
inspirational and relaxing
music**



2 MODULE TWO

Positive Intelligence

Write down any words that come to mind here

What words do you connect with the most that makes you feel confident?



2 MODULE TWO

Positive Intelligence

If you are challenged to find words, reflect on some of your biggest achievements in the last few years. Write them here

Now highlight the words that you believe and that resonate with you



2

MODULE TWO

Time Management

MAKE TIME WORK FOR YOU

Motivation and **momentum** are two highly connected concepts.

You cannot have either of these without first acting in a **goal-directed way**.



TIP: Action precedes motivation

Time management is about more than just managing our time; it is about managing ourselves, in relation to time. To manage ourselves in relation to time, it is necessary to prioritize. It can feel overwhelming to decide upon activities that deserve our attention; however, there are various methods to find the best way to make maximum use of time.

Time Management Matrix



	URGENT	NOT URGENT
IMPORTANT	<p>1</p> <ul style="list-style-type: none"> • crises • emergencies • pressing problems • deadline-driven projects • last minute-preparations 	<p>2</p> <ul style="list-style-type: none"> • preparation, planning, prevention • values clarification • capability improvement • relationship building • true recreation/relaxation
NOT IMPORTANT	<p>3</p> <ul style="list-style-type: none"> • interruptions • some callers, some mail • some meetings • many pressing matters • popular activities 	<p>4</p> <ul style="list-style-type: none"> • busy work • trivial activities • some calls/emails • escape activities • time wasters



2 MODULE TWO

On Importance

“What is important is seldom urgent and what is urgent is seldom important.”

— Dwight D. Eisenhower
(34th US President)



2 MODULE TWO

Managing Your Time

How much time will you be able to focus on your business?

What is getting in the way?

Make time to focus on your goals



2 MODULE TWO

Assignment

Complete the
time management
skills test

Please download the skills test
from the learning portal.

It is located in the Course
Materials Section.

**“What lies behind us and what lies before
us are tiny matters compared to what lies
within us.”**

— Henry Stanley Haskins



Create SMART Goals

SMART stands for:

Specific, Measurable, Achievable, Relevant and Time-Bound

 Specific	 Measurable	 Attainable	 Realistic	 Time-bound
<p>Do: Set real numbers with real deadlines.</p> <p>Don't: Say, "I want more visitors."</p>	<p>Do: Make sure your goal is trackable.</p> <p>Don't: Hide behind buzzwords like, "brand engagement," or, "social influence."</p>	<p>Do: Work towards a goal that is challenging, but possible.</p> <p>Don't: Try to take over the world in one night.</p>	<p>Do: Be honest with yourself- you know what you and your team are capable of.</p> <p>Don't: Forget any hurdles you may have to overcome.</p>	<p>Do: Give yourself a deadline.</p> <p>Don't: Keep pushing towards a goal you might hit, "some day."</p>

According to *Atomic Habits* author **James Clear**, it is important to set goals you will follow. He recommends the approach of **Eliminate, Stack, and Set**.

Eliminate: Ruthlessly eliminate your goals – avoid goal competition

Stack: Stack your goals. For example, "After I return from my lunch break, I will send one email to someone I want to meet." (Networking)

Set an upper limit. (E.g., "I want to make at least 10 get acquainted calls today, but not more than 15.")

2

MODULE TWO

Your Professional Fee Structure

Deciding what to charge can be a major challenge when it comes to creating your coaching program. You need to price your coaching services in a way that attracts your target client while also meeting the financial goals for your coaching business.

There is a sweet spot where your professional fees are just right. The goal is to find that spot for you which is not too low as to decrease the value the client sees in your services or too high that you price yourself out of reach. You don't want to sell yourself short or undervalue the importance of the service you offer. To get an idea of what to charge, conduct **market research**.

What's Next?

Return to the
Business Plan
Questionnaire
exercise on
competitive
intelligence



This will help you
to explore how
other coaches
approach their
professional fee
structure



2 MODULE TWO

Write Down Your Biggest Fear

What is the worst thing you imagine when you think about launching your coaching business?

Write down your current expenses



2 MODULE TWO

Analyzing Your Expenses

Next up, figure out if there's any fat to those expenses, that you could cut for the sake of your business. Don't feel that you have to immediately slash everything, but try and get a little creative, and see what you can sustainably trim.

Now write down your new, slimmed down, expenses
(This is the real number to worry about)

This is your
key
monthly
expense

Now, ask yourself this question....

How much money do I need to have in reserve in order to feel comfortable quitting my job and supporting myself based on my savings? Is it one month? Two months? A year?

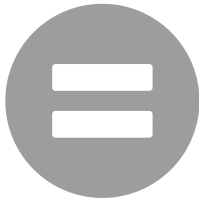


2 MODULE TWO

Analyzing Your Expenses

There's no right or wrong answer.
Each of us has a different comfort level with money risk.

Multiply it against your monthly number



This equals the amount you
need to have saved up
before you try and go
full-time as a coach.



What are your financial goals for your business?

Do you want to go full-time or part-time with your coaching business?



2 MODULE TWO

Analyzing Your Expenses

EXERCISE: create your own money plan

Write down your start up cost considerations



2 MODULE TWO

Money

What are some limiting beliefs you have about money?

REFRAMING MONEY BELIEFS

Money doesn't buy happiness.


Money can buy the things I want for a good life.

You need money to make money.

Money can buy the things I want for a good life.

I can never save.

I am learning more about money and saving every day.



Where do these beliefs come from?

MONEY MANTRAS

\$ "I am enough. I am worthy of success, and I deserve prosperity and wealth."

\$ "Money is just energy, and energy is abundant."

\$ "As long as we're making money righteously, we're not only receiving a blessing but also extending one to others." – Marianne Williamson, The Law of Divine Compensation.



2 MODULE TWO

Money



How much do you want to earn?



This is my business and my life. I can attract new opportunities. Every day I am moving closer to my ideal business and my dream life



Determine how much gross income you want to earn per year

Break that number down into a monthly amount

Break that number down into a weekly amount

Determine the number of coaching clients you need to set



2 MODULE TWO

True Evaluation Exercise

HOW MUCH DO YOU WANT TO EARN?

Example



Determine how much gross income you want to earn per year =
\$120,000 per year



Break that number down into a monthly amount = **\$10,000 per month**



Then, break that number down into a weekly amount = **approx. \$2,300 per week**



Next, determine the number of coaching clients you need to see based on your hourly rate or group coaching rate and the number of hours you can see clients per week.

- Example – 5-day work week, 7-hour workday, seeing 4 coaching clients per workday = \$115 as your hourly rate
 - To break this down further (show the math!)
 - \$2,300 per week / 5 days per week = \$460
 - \$460 per day and seeing 4 clients per workday is $\$460/4 = \115

Are you struggling to come up with an hourly rate for your coaching services?

Consider this **true evaluation exercise** to understand the value of your service offering.

1

Describe how many years of experience you are bringing to your business right now. Start as far back as childhood, valuing your inherent and natural talents that you have been nurturing and developing along the way. Think about early jobs where you learned skills that you still use today.



2 MODULE TWO

True Evaluation Exercise

2

Next, in your current career, what have you invested in your education, training, reading, etc., to better your skills and understanding. Think about this from both a financial and time viewpoint.

3


Product service specific: how much time, effort, and money have you invested in your coach journey already?



2 MODULE TWO

Coaching Business One-Time Costs

You will want to consider where and how you work. Is it a hybrid style of working with a combination of in-office and remote, all remote, or always in-office? It may be more cost-effective to start an online coaching business than to have a physical space. The average cost for an online coaching business remains between \$5,000 and \$15,000.

START UP COSTS	<p>Start up costs (including insurance, payroll, research, permits, office supplies, marketing, utilities, and accreditation):</p> <p>Average cost: \$22, 173 Minimum cost: \$62 Maximum cost: \$38,061</p>	
	<p>Business formation fees:</p> <p>Average cost: \$15,000 Minimum cost: 5,000 Maximum cost: \$15,000</p>	
	<p>Legal fees:</p> <p>Average cost: \$1,500 Minimum cost: \$0 Maximum cost: \$1,500</p>	
	<p>Collecting, remitting, and paying taxes</p>	
	<p>Inventory (any office supplies, swag, promotional material)</p>	

The one-time costs include, but are not limited to

- laptop or computer purchase
- coach training
- website design
- smartphone
- headset
- lighting
- business domain name registration

[Starterstory: Coaching Business Startup Costs](#)

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2 MODULE TWO

Startup Costs

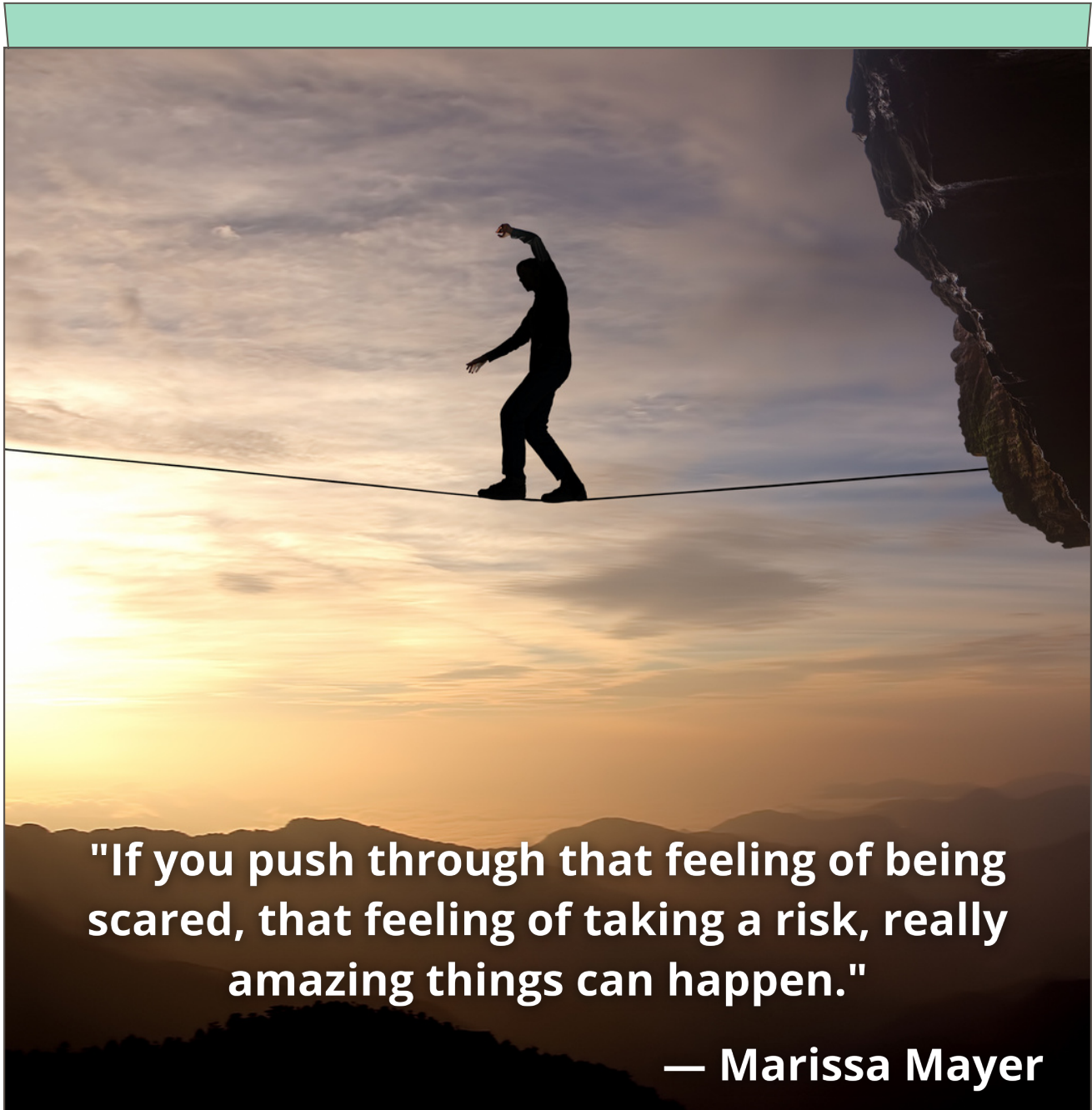
- Permit and accreditation fees
- Small business insurance
- Set up business: Incorporation or LLC
- Software expenses
- File hosting service
- Email marketing tool
- Accounting and invoicing software
- CRM software
- Business email hosting service
- Internal communication tool
- Project management software
- IT support
- Payroll software
- Social media management tools
- Office space rental
- Utility cost
- Wifi and Internet
- Employee and/or freelancer cost
- Employee hiring expenses
- Employee rewards
- Domain name and website costs
- Website builder
- Website designer
- Website hosting costs
- Cloud storage
- Trademark



2

MODULE TWO

Push Through Being Scared



"If you push through that feeling of being scared, that feeling of taking a risk, really amazing things can happen."

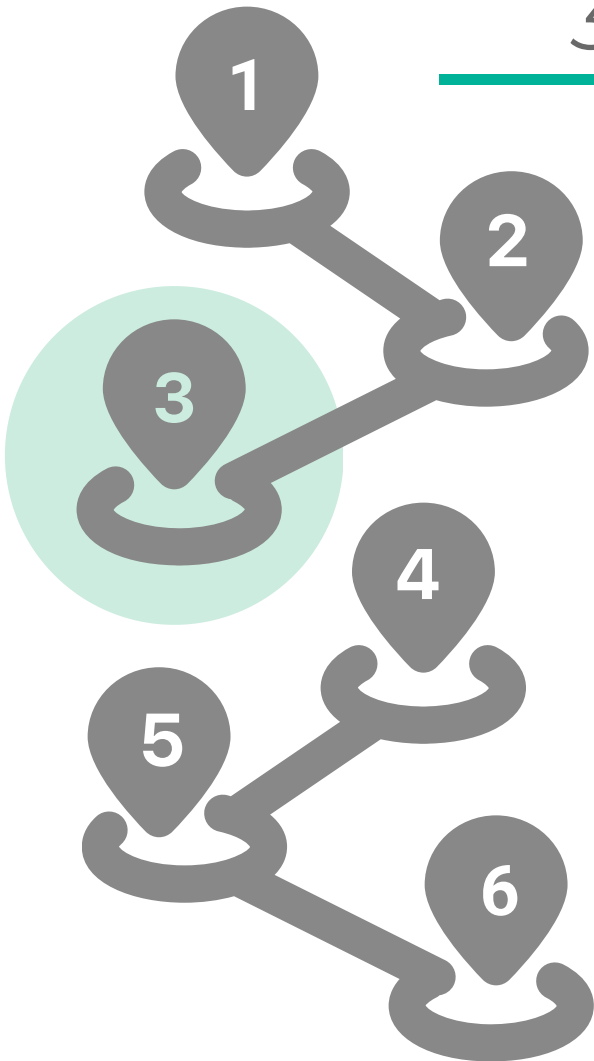
— Marissa Mayer



The Roadmap

Module Three: Preparation

3. PREPARATION



- Competitive Intel
- SWOT Analysis
- Strategy Exercise

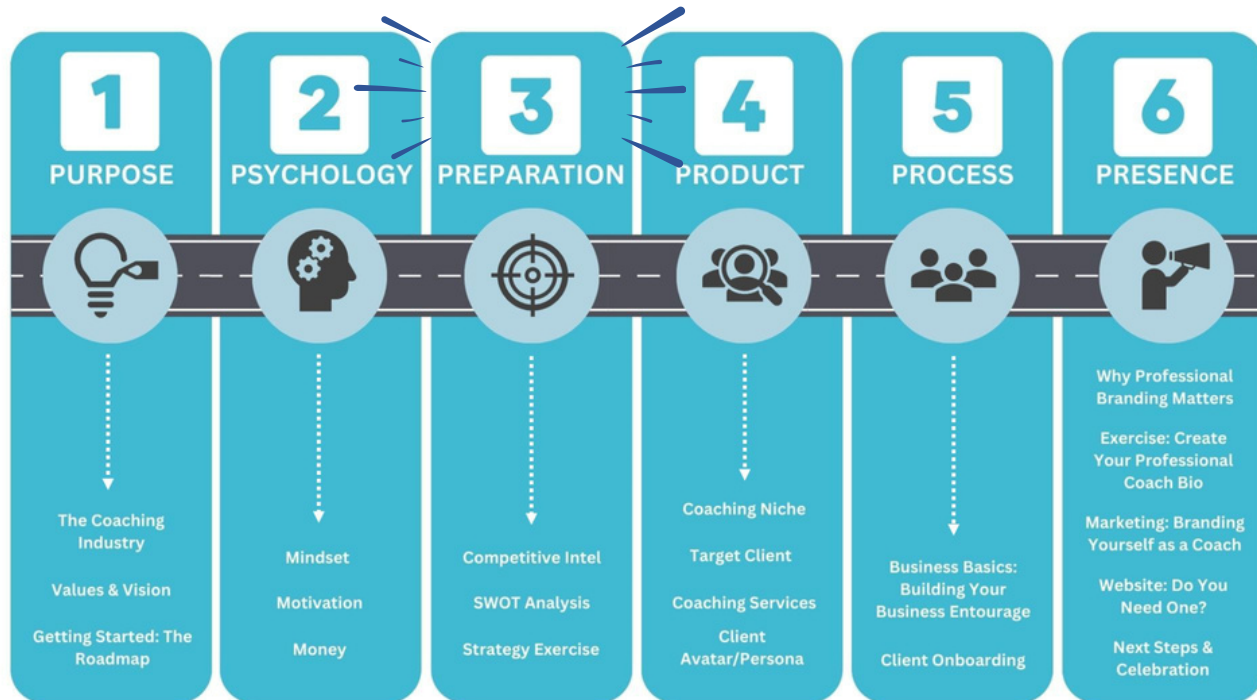
Module Three content focuses on understanding the importance of conducting a competitive analysis through market research to unlock your competitive advantage or your ability to stay ahead of the game. You do this by understanding your competitors and keeping current about the coaching market landscape.

“There are no secrets to success. It is the result of preparation, hard work and learning from failure.”

— Colin Powell

3 MODULE THREE

Preparation



This module explores the significance of competitive analysis for coaches and highlights the role of **market research** in unlocking your competitive advantage.

UNDERSTANDING COMPETITIVE ANALYSIS

Competitive analysis is the process of evaluating and understanding the strengths and weaknesses of your competitors to identify opportunities for growth. For coaches, it involves assessing other coaches or coaching businesses to gain insights into their strategies, positioning, and market share. Conducting competitive analysis provides several benefits, such as (see next page):



3 MODULE THREE

How To Conduct A Competitive Analysis

1

Identifying Market Trends

Competitive Analysis helps you stay up to date on emerging trends and industry swings. By understanding what competitors are doing. You can adapt you strategies to stay relevant and address changing market demands.

2

Discovering Untapped Opportunities

Competitive Analysis helps you stay up to date on emerging trends and industry swings. By understanding what competitors are doing. You can adapt you strategies to stay relevant and address changing market demands.

3

Improving Decision-Making

Competitive analysis provides you with key insights that can help you when making decisions. By understanding the strategies and tactics applied by your competitors, you can make informed choices about pricing, marketing, and service offerings.

Market research plays a pivotal role in supporting the process of competitive analysis. It provides you with the essential information to gain a deeper understanding of your competitors and the coaching market variables.

4

Identifying Competitors

To conduct effective, competitive analysis, coaches need to identify both their direct and indirect competitors. Direct competitors are those who offer similar coaching services or target the same audience. Indirect competitors, on the other hand, may not offer the same services but cater to the same needs or solve similar problems.



3 MODULE THREE

How To Identify Competitors

1

Online Research

Exploring coaching directories, search engines, and social media platforms to identify other coaches operating in your niche. Pay attention to their specialization, target audience, and unique selling propositions.

2

Networking and Referrals

Engage with other coaches in professional networks, attend industry events, and seek referrals. Building relationships with fellow coaches not only expands your network but also provides into their business.

RESEARCH 3-5 COACHING WEBSITES

As per the Business Plan Questionnaire

Research 3 to 5 coaching websites that you think look amazing and that could be serious competition for you.

Make a list or spreadsheet with the key criteria they capture (or miss)

Sample Criteria


- | | |
|--|---|
| <ul style="list-style-type: none"> • Name • Bio • 'What's Their Story' • Headshots • Compelling Videos • Blogs (Current) | <ul style="list-style-type: none"> • Newsletter • Free Intro Calls • Coaching Packages • Pricing • Results-Oriented Testimonials |
|--|---|



3 MODULE THREE

Research 3-5 Coaching Websites

1

Name of Website	
http:// 	
Coach Name? Include Details	<input type="radio"/> YES <input type="radio"/> NO
Do they have compelling videos? Add anything else you want to note	<input type="radio"/> YES <input type="radio"/> NO
Do they have a blog? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
Do they have a newsletter? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
Do they have free intro calls? ? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
Do they have coaching packages? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
Do they have pricing available on their website? Other notes?	<input type="radio"/> YES <input type="radio"/> NO
Do they feature client testimonials? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO



3 MODULE THREE

Research 3-5 Coaching Websites

1

List any additional notes
you'd like to add below




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3 MODULE THREE

2

Research 3-5 Coaching Websites

Name of Website	
http:// 	
Coach Name. Include Details	<input type="radio"/> YES <input type="radio"/> NO
Do they have compelling videos? Add anything else you want to note	<input type="radio"/> YES <input type="radio"/> NO
Do they have a blog? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
Do they have a newsletter? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
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Do they have pricing available on their website? Other notes?	<input type="radio"/> YES <input type="radio"/> NO
Do they feature client testimonials? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO



3 MODULE THREE

2

Research 3-5 Coaching Websites

List any additional notes
you'd like to add below



3 MODULE THREE

3

Research 3-5 Coaching Websites

Name of Website	
<div style="border: 1px solid black; padding: 5px;"> http:// <input style="width: 150px; height: 20px;" type="text"/> </div>	
Coach Name? Include Details	<input type="radio"/> YES <input type="radio"/> NO
<input style="width: 100%; height: 25px;" type="text"/>	
Do they have compelling videos? Add anything else you want to note	<input type="radio"/> YES <input type="radio"/> NO
<input style="width: 100%; height: 25px;" type="text"/>	
Do they have a blog? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
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Do they have pricing available on their website? Other notes?	<input type="radio"/> YES <input type="radio"/> NO
<input style="width: 100%; height: 25px;" type="text"/>	
Do they feature client testimonials? Is there anything else to note?	<input type="radio"/> YES <input type="radio"/> NO
<input style="width: 100%; height: 25px;" type="text"/>	



3

MODULE THREE

3

Research 3-5 Coaching Websites

List any additional notes
you'd like to add below



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3 MODULE THREE

Gathering Market Intelligence

To conduct a thorough **competitive analysis**, coaches need to gather market intelligence from various sources. Market research provides coaches with the necessary data and insights to inform their decision-making process. Here are some sources of market intelligence for competitive analysis:

Primary Research Methods

Conduct surveys, interviews, and focus groups with existing and potential clients to understand their preferences, needs, and perceptions. This **primary research** helps coaches gather valuable insights directly from their target audience.

Secondary Research Techniques

Explore industry reports, market studies, and competitor websites to gather **secondary data**. This information provides a broader view of the market, competitor strategies, and industry trends.

Analyzing Competitor Strategies

Once coaches have gathered relevant data, it's time to **analyze competitor strategies** and draw meaningful insights. Key areas to focus on when analyzing competitor strategies include:

- 1) **Pricing:** Compare the pricing models, packages, and discounts offered by competitors. Evaluate how your pricing structure compares and consider adjustments if necessary.
- 2) **Positioning and Differentiation:** Analyze how competitors position themselves in the market and differentiate their services. Identify gaps or areas where you can offer a unique value proposition to attract clients.
- 3) **Marketing Tactics:** Study the marketing channels, content strategies, and advertising campaigns used by competitors. Identify successful tactics and adapt them to suit your coaching business. Benchmarking against competitors is an important aspect of analyzing competitor strategies. By comparing your performance to that of your competitors, you can identify areas for improvement and set benchmarks to measure your progress.



3 MODULE THREE

SWOT



“SWOT is cool, but strategic thinkers know that there is a point which

- Strengths become weaknesses**
 - Weaknesses become strengths**
 - Opportunities become threats**
 - Threats become opportunities**
- Strategic entrepreneurs and leaders find the greatest insights hiding behind SWOT.”**

— Richie Norton



3 MODULE THREE

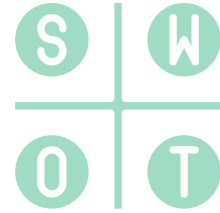
The Aim of a SWOT Analysis

- To help you make decisions and consider ideas
- To bring a clearer sense of purpose and understand key success factors
- To organize the important factors associated with success and failure
- To analyze issues that have led to failure in the past
- To provide linearity to the decision-making process and make complex factors easier to understand and address



3 MODULE THREE

Outline Your SWOT Analysis



STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS



3 MODULE THREE

Strategy Exercise

Answer: Where am I? Where am I going? How will I get there?

Growth requires planning, strategy, and focused effort.

**“Growth is intentional.
Change is inevitable.”**

— John C. Maxwell



3 MODULE THREE

Self-Reflection

Consider how many choices in your day are intentional? Of those, how many choices are in the moment and how many are the result of a strategy?

How do you help people as a coach?

Why is this important? Focus on goals and results



3 MODULE THREE

Self-Reflection

Consider how many choices in your day are intentional? Of those, how many choices are in the moment and how many are the result of a strategy?

List your core value statements (from Module One)

What are your strengths or unique value proposition as a coach?



3 MODULE THREE

Signature Coaching

Presence Statement

Here is an example of developing a signature coaching presence statement. Think about how you would like to format it to your unique offerings as a coach and reflect on the next page.

SIGNATURE COACHING PRESENCE STATEMENT (COACHING PHILOSOPHY) INCLUDES YOUR CORE VALUES

STEP 1

Start thinking about your signature coaching presence (coaching philosophy). We will revisit it in upcoming modules.

List your core values (from Module 1).

Use 3 values in your statement as your "North Star" Approach that guides your coaching presence.

Example

Mutual Respect "Always approach clients with unconditional positive regard"	Confidentiality "Honouring the confidentiality and ethics of the client-coach relationship at all times"	Empathy "Being aware of unconscious biases and holding space for the client to share without judgement"
---	--	---

"My signature coaching presence is anchored in an evidence-based approach that is an eclectic blend of kindness and courage, empathy, and insight, designed to support those I coach to connect to their strengths and gain greater self-awareness through working with me as a confidential strategic thinking partner. I am a guardian of coaching ethics and draw upon my intuition and mindfulness to balance compassion while also challenging my clients to foster their personal and professional development"

— Susan Merli, PCC

3 MODULE THREE

Signature Coaching

Presence Statement

STEP 1

List your core value statements (from Module One)

STEP 2

Use your core values as your North Star approach that guides your signature coaching presence statement



3 MODULE THREE

Developing a Belief System

STEP 2: DEVELOP A PERSONAL BELIEF SYSTEM BY DEVELOPING ACTIONS FOR EACH VALUE

This becomes your
North Star Belief
System



Authentika's Coaching Belief System 'Step 2'



You'll always feel SUPPORT



Safe | We provide a haven for confidential conversations



Understood | We provide a judgment-free zone where "what if" ideas are encouraged



Proud | We celebrate our client's accomplishments no matter the size



Poised We help position our clients for success by readying them to tackle even their biggest challenges confidently and courageously



Optimistic | We believe our clients are resourceful and capable of achieving their goals



Responsive | We build client connections based on rapport, empathy, compassion, and deep sense of gratitude



Trust | We build trust one interaction and one decision at a time

How to Name Your Business

- Think long-term
- Consider how you want your business to be perceived
- Pick something that is easy to pronounce and remember
- Don't try to be too clever or witty
- Check available website domain
- Find out if the name is taken (E.g., Nuans.com)
- Be distinctive
- Don't be too personal
- Avoid acronyms and abbreviations
- Get input

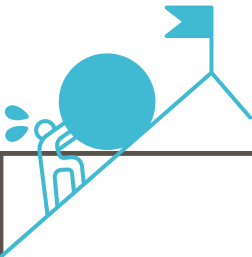


3 MODULE THREE

Design Your Client Avatar



What are your client's top priorities?
What are their values, feelings, and goals?



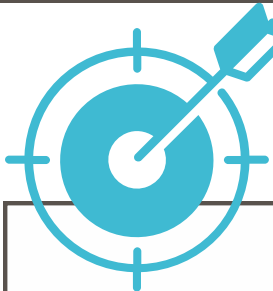
What are your client's current challenges?
What problems can you help them solve?

3 MODULE THREE

Design Your Client Avatar



What is your client reading? How do they access their "go to" sources of information?



What will it take for your client to be successful? What type of action steps would they need to take? How much time, energy, and effort will they need to invest when working with you?



3 MODULE THREE

Design Your Client Avatar



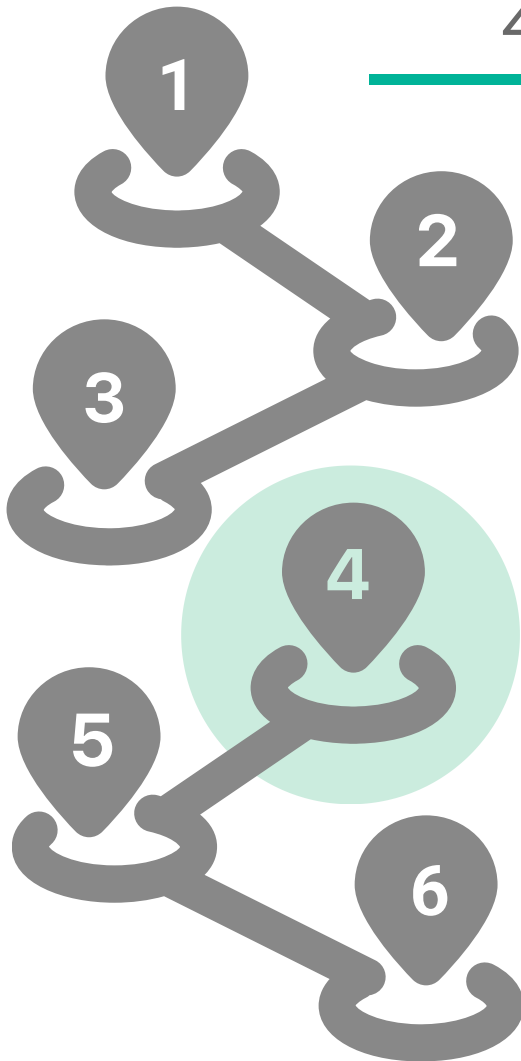
Your ideal client can pay for your services and values what you do – price and package with certainty!



The Roadmap

Module Four: Product

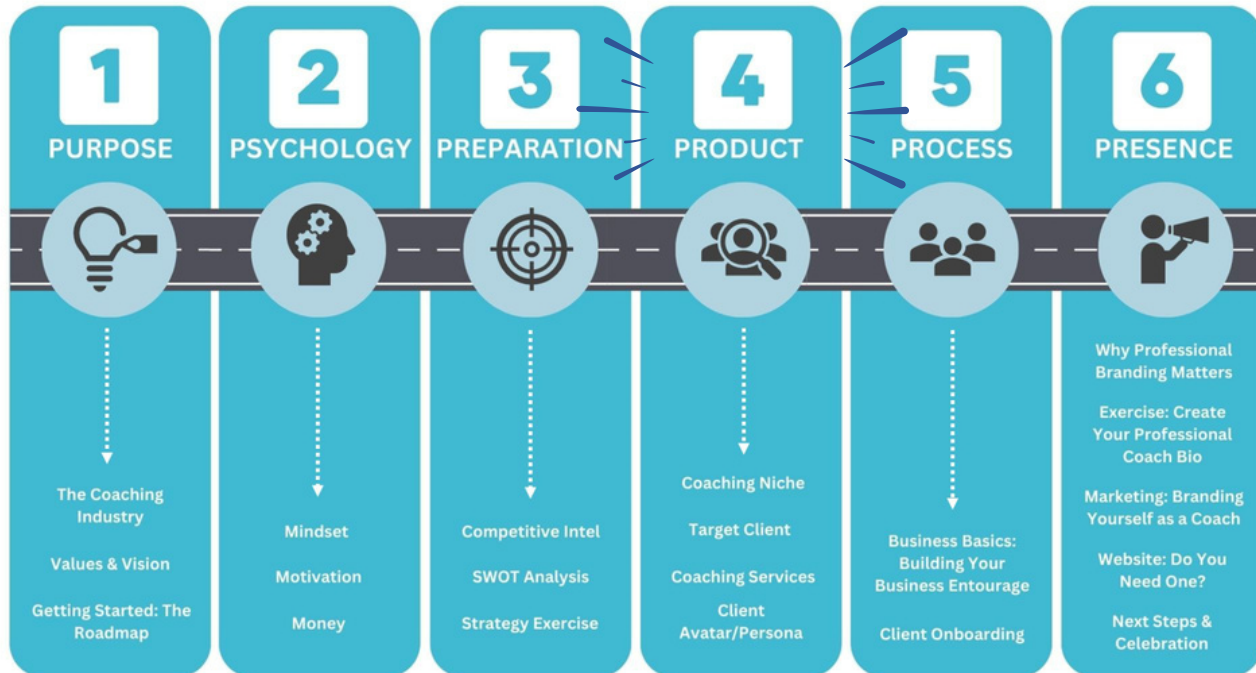
4. PRODUCT



- Coaching Niche
- Target Client
- Coaching Services
- Client/Avatar Persona

Module Four covers the importance of identifying your unique service offering, niching, and identifying your ideal client avatar. This week's focus includes an exploration of the structure of your coaching services and the coaching methodologies and techniques you may use.

Preparation



Everyone is not your customer is one of the basic principles of marketing guru, Seth Godin. Every business, every product has its own target customers and users. Not everyone will be drawn to want your product or service offering. Therefore, **defining a coaching niche** is one of the most important things that a coach can do. In class, we will discuss why getting this right is a critical element to establishing a flourishing coaching business.

What is a Niche?

It is the subset of the market on which a specific product is focusing. The **market niche** defines the specific product features aimed at satisfying specific market needs. Ultimately, you want to consider competing in a niche space with little if any competition. The caveat here is that you need to test that there is enough potential **market demand**. When you take the time to define your niche, you'll have stronger messaging that evokes strong emotional connections between you and your client,

Your **call to action** will resonate with them in ways that motivate them to purchase your services, freely offer referrals, and provide results-oriented testimonials.



4

MODULE FOUR

Who is Your Perfect Coaching Client?

If I were to ask you “Who is your perfect client?” can you describe them? Think about the answers to these questions for a moment and write it down and get as detailed as you possibly can. Until you know what makes your work in the field of coaching unique, you will find it very difficult to convey your skills and the specific assistance you offer to your **target clients**. You may also have difficulty determining what material you should and shouldn't cover.

For example, if you're a relationship coach that works with separated couples, you wouldn't use the same materials as a relationship coach that works with parents trying to understand their teenager who is going through a difficult time.

Please watch the 13:53 minute video by Shopify called [How to find your Niche Market + 5 Examples to inspire you](#)

Defining Your Ideal or target Client Requires Thoughtful Consideration

Think about answers to these questions and use the space provided on the next page to get as detailed as you possibly can with your responses. Investing the time now to answer these questions will save you so much time when you are working on your coaching bio, elevator pitch, website content, and social media images and messaging.



4

MODULE FOUR

Creating Your Target Client Profile (Client Avatar)

Broad description of your target client (E.g., any details you can think of that aren't covered in the categories already listed in the chart).	
Age range	
Psychographics (including social status and/or cultural background)	
Education	
Spending patterns	
Lead time to decisions	
Availability for coaching sessions	
Preferences for meeting	
Their experiences with coaching (E.g., Have they worked with a coach before?)	
Associations or organizations they belong to	



4

MODULE FOUR

Creating Your Target Client Profile (Client Avatar)

What are their values, feelings, and goals?	
What are their current challenges (what keeps them up at night?)	
What problems can you help them solve?	
What does your target client read?	
How do they access their "go to" sources of information?	
What will it take for your client to be successful?	
What type of action steps would they need to take?	
How much time, effort, and energy will they need to invest while working with you?	



4

MODULE FOUR

Coaching Program Structure

Once you've defined your ideal client, you'll find the process of developing your coaching program structure much easier. In fact, all of your marketing efforts will be more targeted, influential, and effective.

Now it is time to identify how you structure your coaching business. Please use the space provided to answer the following questions:

<p>Will you work one-on-one with your target client?</p>	
<p>Will you offer group coaching (involves working with multiple clients together - also can be in-person or virtual).</p>	
<p>What is your delivery method? (E.g., online, in-person, both, other).</p>	
<p>What is the frequency of your coaching for your target client? (E.g., weekly, bi-weekly, month-to-month, half or full day sessions, year-long masterminds).</p>	
<p>What is the duration of your coaching programs? (E.g., ad hoc, 1 month, 3, 6, 9 months, 1 year or longer).</p>	



4

MODULE FOUR

Naming Your Coaching Program

This activity is **different than naming your business**. Going through the Target/Ideal Client Profile activity is an important first step before deciding on the name of your coaching program. The goal is to communicate your program offering in a way that is memorable, creative, catchy, and simple. It also needs to sound appealing.

Think about how your clients define themselves. If you're looking for clients that are engineers or accountants, you probably aren't going to land on an artsy name. Rather, you'll want something more business-like and professional. Consider the results and solutions you help your clients achieve. That feeling should be the promise that is held in the name of your coaching program.

Ask for feedback from your actual target client group. Do they like it? Would they buy it? Is it memorable yet easy to pronounce? This is one time when rhythm and alliteration are important factors. Practice saying the name of your coaching program aloud.

Outline and Create Your Coaching Tools

There are plenty of coaching tools, models, methodologies, and techniques available for coaches. Plan your coaching program structure with your coaching tools in mind.



4

MODULE FOUR

Coaching Methodologies

First, consider coaching methodologies. In your coach training, you were introduced to certain models for developing coaching conversations. Examples include GROW and CLEAR. At the International Coaching Group (ICG), student coaches are introduced to the 5 Step Coaching Exchange within the 5.5.5 Coaching Model. A coaching technique is a strategy used with a coaching methodology as an intervention approach. It helps the client to think differently about their challenge and apply the technique to support them in reaching their goal.



[The International Coaching Group](https://www.icgcoach.com/)
[Hotpmo](https://www.hotpmo.com/)



4 MODULE FOUR

15 Coaching Techniques

For example, using **S.M.A.R.T goals**, is a coaching technique that can be used by any coach to help their client structure their way of thinking about tackling a short or long-term goal.

The * represents coaching techniques covered in this course

S	SPECIFIC	<ol style="list-style-type: none"> 1. S.M.A.R.T.Goals* 2. Core Values Exercise* 3. Mission and Vision Statement* 4. Self Awareness Activities (E.g., seeking feedback, completing an observable behaviour preference online self-assessment like DISC or MBTI)* 5. Daily Gratitude 6. Spheres of Influence 7. Time Management Matrix* 8. Weekly Success Planning 9. Coaching Questions 10.SWOT Analysis * 11. Not-to-Do List 12.Love or Loathe List 13.Eat Your Biggest Frog First* 14. Letting Go 15. Cartesian Questions
M	MEASURABLE	
A	ACHIEVABLE	
R	RELEVANT	
T	TIME-BOUND	

[15 Coaching Techniques That Work For Any Niche or Client](#)

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4

MODULE FOUR

Design Your Ideal Work Day

Imagine you can spend your workday any way you like and in any environment. Where would you be? Who are you meeting with? What does it feel like to work with them? Now complete the answers to the following questions to help you design your ideal workday.

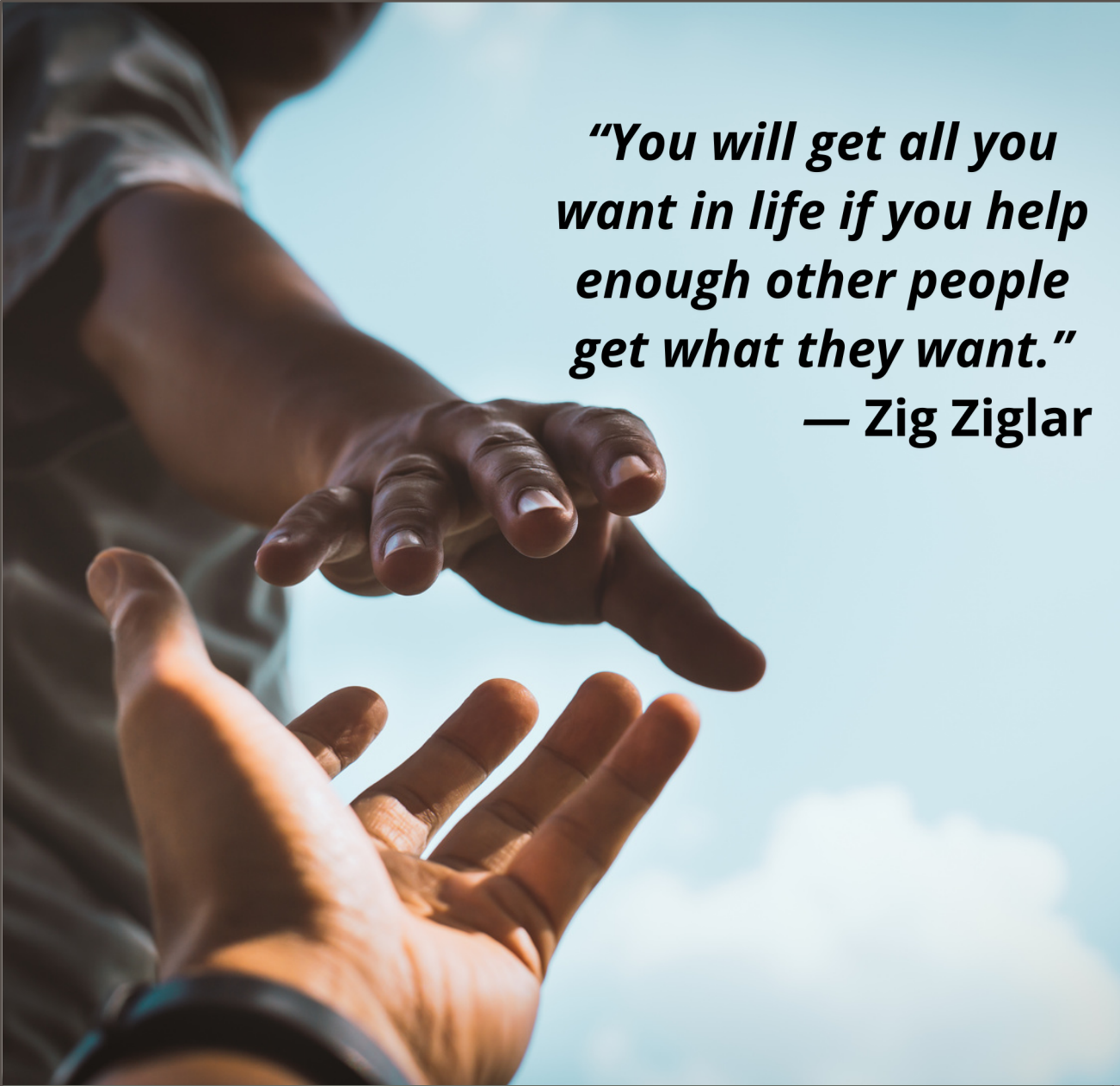
Where are you?	
It is first thing in the morning. How are you feeling about your day?	
Who are you meeting with and for how long?	
What are example topics you might cover with your clients?	
What do you hear from the people you're coaching?	
What are your top emotions?	
What is your energy like at the end of your workday?	
Expand on your ideal workday including your feelings, thoughts, and activities during your ideal day.	



4

MODULE FOUR

You Will Get What You Want



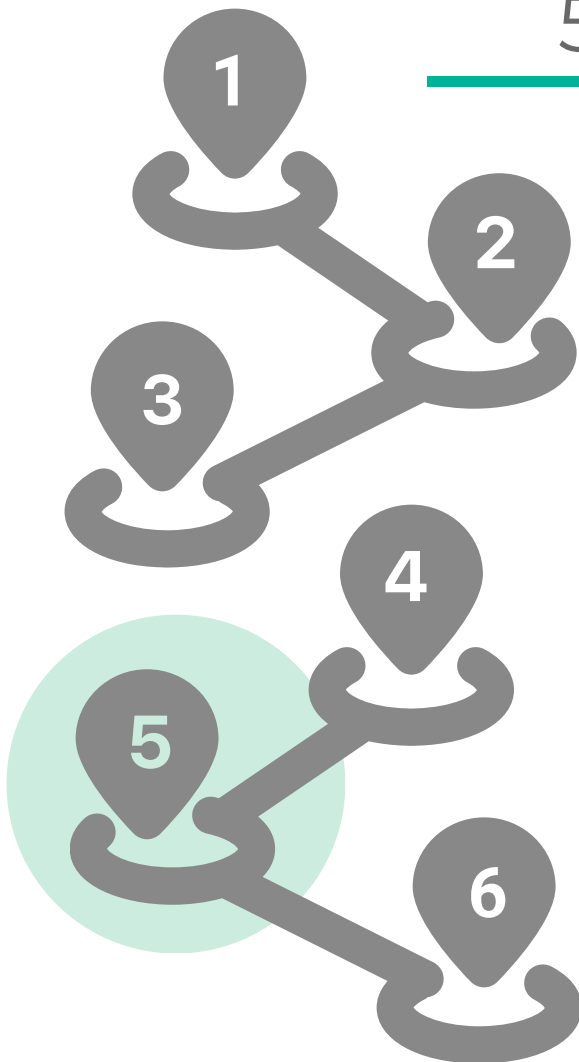
“You will get all you want in life if you help enough other people get what they want.”
— Zig Ziglar



The Roadmap

Module Five: Process

5. PROCESS

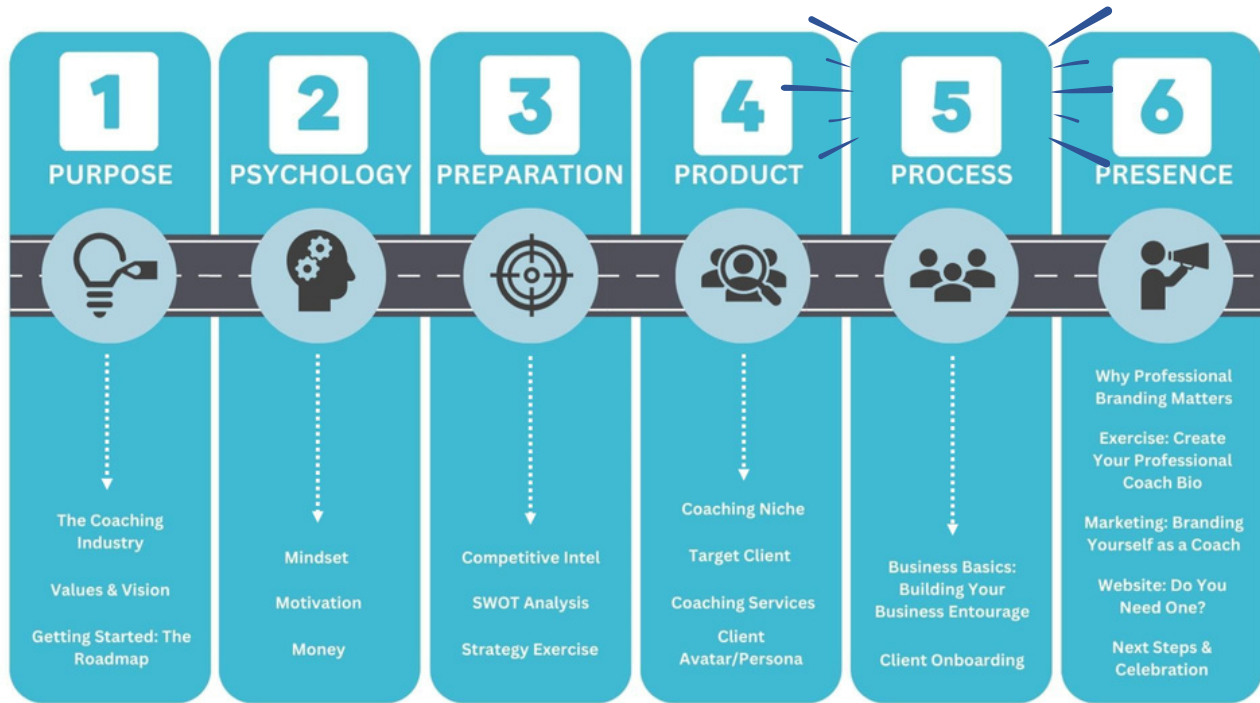


- Business Basics
- Building Your Business Entourage
- Client Onboarding

Module 5 examines the process of running a functioning business, which includes systems and processes. You learn about registering a business, the payment process, and securing your business "entourage". Also covered this week is the client onboarding process.

5 MODULE FIVE

Process



As a small business owner, it is essential to learn about the basics of running a functioning business, which includes **systems and processes**. Business basics include knowledge in registering a business, the payment process, and securing your business “entourage” such as an accountant/bookkeeper, banker, lawyer, admin support, and a business coach.

“At its core, a full-functioning business is basically a set of systems and processes”

— John Jantsch



5

MODULE FIVE

Choosing and Registering a Small Business

Information for Canada



[How to Choose a Business Name](#)



[How to register your sole proprietorship through your province](#)



[How to register a federal corporation through the government's site](#)



[How to register a provincial corporation through each province's site](#)

Information for the United States of America



[SBA: U.S. Small Business Administration](#)



[Zen Business \(LLC Service\)](#)

Add any notes on your findings in choosing and registering a small business here



5

MODULE FIVE

Secure Your Entourage



Your business entourage represent a group of people attending to or surrounding YOU! This means you must have trusted and reliable resources in place including the following:



Accountant and a Book Keeper



Small Business Banker



Lawyer/ Attorney



Mentor/ Business Coach



**Accountability Buddy
(E.g., Fellow Small Business Owner)**



5

MODULE FIVE

Professional Service Supports

While this list of resources is not comprehensive, it provides a foundation to ensure you're building your business with the right professional service supports in place from the start.

Legal Services – A Sampling of Possible Vendors in the United States of America

[Uschamber](#)

[Legalmatch](#)

[FindLaw](#)

[Legalshield](#)

CREATING A COACHING AGREEMENT OR A 'COACHING WELCOME PACKAGE'

As a **small business owner**, you will want to protect you and your client. It also makes sure your clients understand the expectations and deliverables of a coaching engagement with you. Laying out the parameters of your coaching agreement helps to build trust and it improves your **coaching services**. It addresses the responsibilities of both parties (you and your client), the professional fees, the cancellation policy, confidentiality, meeting scheduling, communication expectations, and your refund policy, if applicable. It helps you **set boundaries** as well as **clearly defines the terms of your coaching**.



5

MODULE FIVE

Components of a Client Coaching Agreement

A coaching contract consists of the following parts:

1. Introduction

The introduction establishes the purpose of your contract. You identify the parties of the contract (you and your client).

2. Program Description

The program description gives a clear overview of your coaching program. What's included? How many hours/calls?

3. Expectations and Responsibilities

In this section, you list your own responsibilities as a coach. You also list your client's responsibilities as a coachee.

4. Scheduling and Communications

What is your policy on contacting you and rescheduling calls? This is the section that establishes your policy.

5. Investment and Rates

Here you state your program rates, your refund policy, and other payment-related issues.



MODULE FIVE

Components of a Client Coaching Agreement

6. Confidentiality

Your confidentiality clause outlines the information that is and isn't confidential and under what circumstances.

7. Intellectual Property Rights

This is the section where you establish how your clients can use your content.

8. Personal Responsibility, Disclaimer, and Release of Claims

Here, you tell clients what they can expect of your services and what they shouldn't expect. You're clarifying that you can't promise specific results and that your coaching isn't medical/financial or legal in nature.

9. Other Terms

This section helps you include different terms that don't fit in the other sections. For example: How contracts can be terminated and how you resolve disputes.

10. Sample Client Coaching Agreements

[ICF Sample Coaching Agreement](#) [The Contracts Market](#)

[HoneyBook Online Contracts](#) [LawDepot](#) [AWE Contracts](#)

You can also use a tool like [LegalZoom](#) or [RocketLawyer](#).



5

MODULE FIVE

Client Intake Process

The intake session helps you develop a better understanding of your client’s need and their way of working. It helps you develop a better understanding of your client’s needs and if there is a fit with your **coaching style**. It helps your client understand what coaching is and isn’t. It clarifies your administration, billing, confidentiality, ethics, and scheduling practices.

Client Intake Clarity Questionnaire

QUESTIONS
TO ASK
PRIOR TO
THE FIRST
COACHING
CALL

About Coaching

? What is your experience of coaching?
What would you like to gain from working with a coach?

What are the most important business/professional goals that you have identified for yourself?
Describe in detail 1-3 areas you would most like to focus on.

How willing and able are you to take action to achieve your desired goals?

Are there any roadblocks to your success that you can readily identify?

Where is the gap between where you are and where you want to be in the future?



Think ahead to when our coaching sessions will conclude: How will things look different? What would you like to have accomplished?

How can I best support you?
What tips can you give me in relation to challenging you? How do you like to be challenged?

How can I best help you be accountable to your stated goals and actions?



5

MODULE FIVE

Client Onboarding Process

Components to consider as you begin the client onboarding process:

<p>Will you offer a free Get Acquainted Call (GAC)? (15 or 30 minutes is the norm)</p>	
<p>Scheduling - will you use a tool like Calendly or comprehensive coaching apps such as:</p> <ul style="list-style-type: none"> • Paperbell • Coach • Delenta • Capterra 	
<p>Will you integrate your scheduling tool into your website?</p>	
<p>Will you have videos as part of the client journey (E.g., Delenta.com)?</p>	
<p>Will you have videos as part of the client journey (E.g., Delenta.com)?</p>	
<p>What intake session form will you use?</p>	



5

MODULE FIVE

Client Onboarding Process

Components to consider as you begin the client onboarding process:

Will you use eContracts with e-signatures or emailed contracts ? (E.g., fillable PDF)

- Possible coaching agreements
- A Statement of Work
- A coaching welcome package
- An email introduction with details of how coaching with you works.
- E.g., [HelloSign](#)

TESTIMONIALS

The process of asking a client for a testimonial may feel awkward especially if you have to follow up a few times before you receive it and then when you get it, it doesn't deliver the impact you expected. It is important to ask for testimonials in a specific and results-oriented way. Testimonials amplify your credibility and trust. This is what is known as social proof. Testimonials are a way to feature your raving fans. Their testimonials combat doubts and fears about what you say you will deliver.

EXAMPLE OF A TESTIMONIAL REQUEST

This is an email format you can feel free to use to request testimonials from **your own clients**.

5

MODULE FIVE



Testimonial Request E-Mail Template

This is an email format you can feel free to use to request testimonials from **your own clients.**

Email Subject: Results-Oriented Testimonial Request

Hi (client name),

I'm writing to ask a favour of you. I would love to receive a results-oriented testimonial from you if you feel this is something you would be comfortable sharing with me.

Why you? Because you're one of my favourite clients and I value your opinion. It means a lot to me. I'm in the process of designing my marketing materials and would like to ask you for some feedback on our work together in the form of a testimonial. If you're willing to participate, here's what I'm hoping to gather.

- 1) An enthusiastic expression of the benefits and results you are enjoying from working with me.
- 2) Before working with me, (brief statement of conditions before) and then the state of the value you have received or are receiving from working with me.
- 3) The three most significant improvements in your business/life, or goals that you can attribute to a direct link to working with me.

It would be greatly appreciated if you could provide me with a testimonial within the next four weeks. If you have any questions about this request or would like me to format a testimonial for you based on what you've verbally shared with me, please advise. I'd be happy to take this step to make the request easier.

With sincere appreciation and thanks,

Your name



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MODULE FIVE

The Benefit of Testimonials



**“Testimonials describe what has
been and are a promise of what is
to come.”**

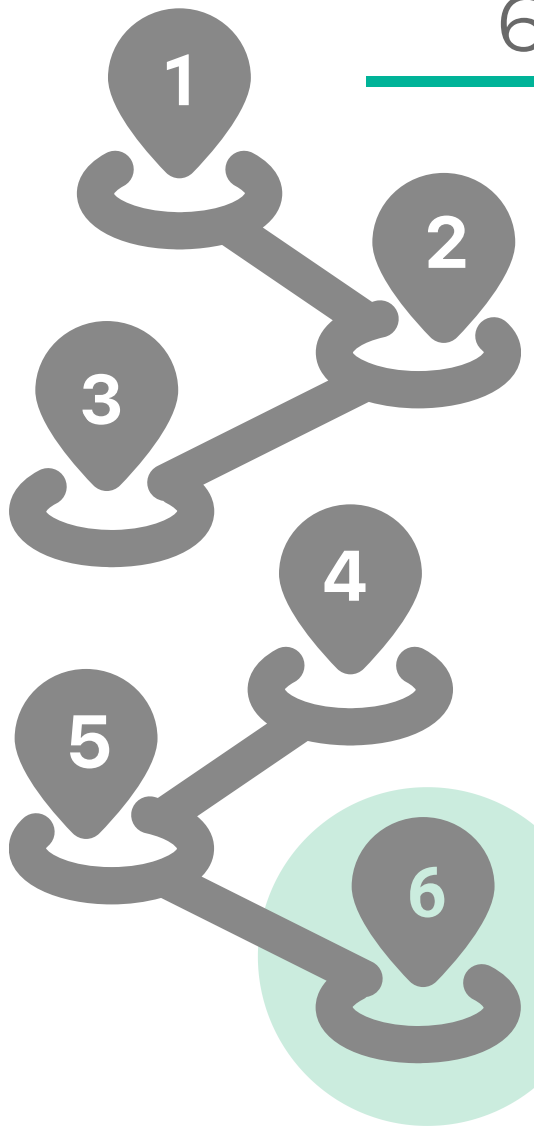
– Ron Kaufman



The Roadmap

Module Six: Presence

6. PRESENCE

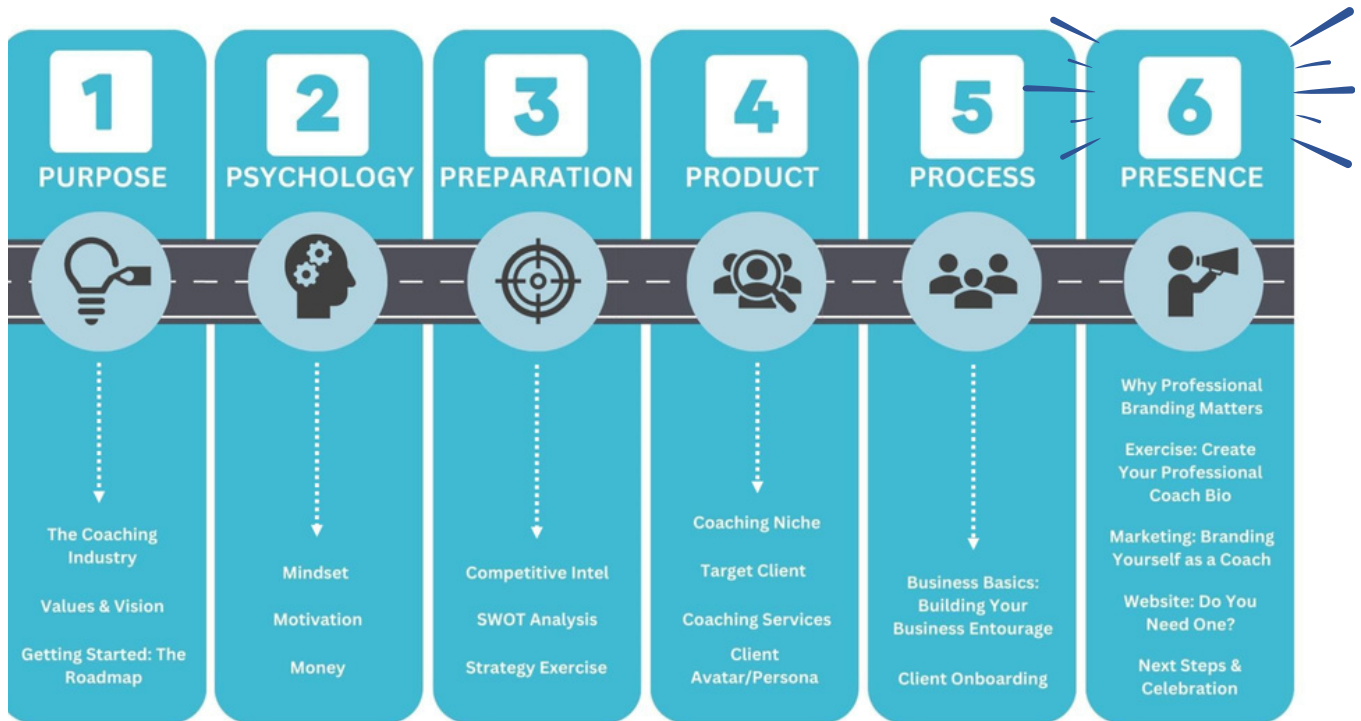


- Why Professional Branding Matters
- Exercise: Create Your Professional Coach Bio
- Marketing: Branding Yourself as a Coach
- Website: Do You Need One?
- Next Steps and Celebration

Module Six explores why professional branding matters and how to write a professional coach bio. You learn about branding and marketing and how to attract your target client and establish trust through key touchpoints. Additionally, and at a high level, we address website platforms and three pillars of social media.

6 MODULE SIX

PRESENCE



Your **brand** defines who you are, what you stand for and describes your skills and experiences. **Professional branding** is a way of showcasing your strengths and personality as well as telling your story. Most coaches use social media, blog platforms, and websites to market their services. With a strong professional brand, you can establish trust with your audience and open new opportunities for business and career growth.

“Your brand is what people say about you when you're not in the room.”

— Jeff Bezos



6

MODULE SIX

Branding

Branding is an amalgamation of the associations, beliefs, feelings, attitudes, and expectations that people collectively hold about you. Please take a few minutes to read the Harvard Business Review (HBR) article – [A New Approach to Personal Branding](#).

A key method for establishing your professional brand is through the creation of a coaching bio. To help you get started with your bio, try the following “Before and After” exercise.

On the left side, list all the **BEFORE** qualities, relationships, hobbies, career, body, attitudes, and circumstances your client possesses. On the right side, list what your client looks like **AFTER** they work with you. The more specific you get, the more you’ll begin to narrow in how your purpose and coaching style helps your clients in tangible and observable ways. What are they like now/after in terms of their qualities, hobbies, career, relationships, thinking/mindset, body, and attitude?

**BEFORE &
AFTER
EXERCISE**



- Draw a line on a paper
- Left side: client qualities before coaching
- Right side: what client looks like after coaching – what qualities or beliefs have shifted?



6

MODULE SIX



Before and After Exercise

Client BEFORE	Client AFTER



6

MODULE SIX

Your Coaching Bio

Writing a **coaching bio** can help make a positive first impression and it is part of your professional identity as a coach. It can be an impressive form of marketing that supports your **signature coaching presence statement**. It can help you stand out to your target market and audience. The purpose of a bio is to provide a brief, concise overview of who you are, what you do, and what sets you apart from others in your field.

A well-written bio should highlight your skills, qualifications, and experience in a way that captivates the reader and inspires trust. It should also convey your personality, values, and approach to coaching, so potential clients can get a sense of what it would be like to work with you.

WHAT TO INCLUDE

Your Background: Your background should include information about who you are and how you got to where you are today. This can include where you grew up, and what inspired you to become a coach. This is your chance to tell your story and establish a connection with your audience.

Your Credentials: Your credentials are important because they establish your credibility as a coach. This can include your education, certifications, and professional memberships. It is important to be specific about your credentials and to explain why they are relevant to your work as a coach.

Your Experience: As a coach is perhaps the most important element of your bio. This can include the number of years you have been working as a coach, the types of clients you have worked with, and the results you have helped them achieve. It is important to be specific and to provide examples of how you have helped your clients.

Your Achievements: This can include awards, publications, or any other notable accomplishments that demonstrate your expertise as a coach. These achievements should be relevant to your work and should help establish your credibility as a professional.

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MODULE SIX

Susan Merli's Coaching Bio

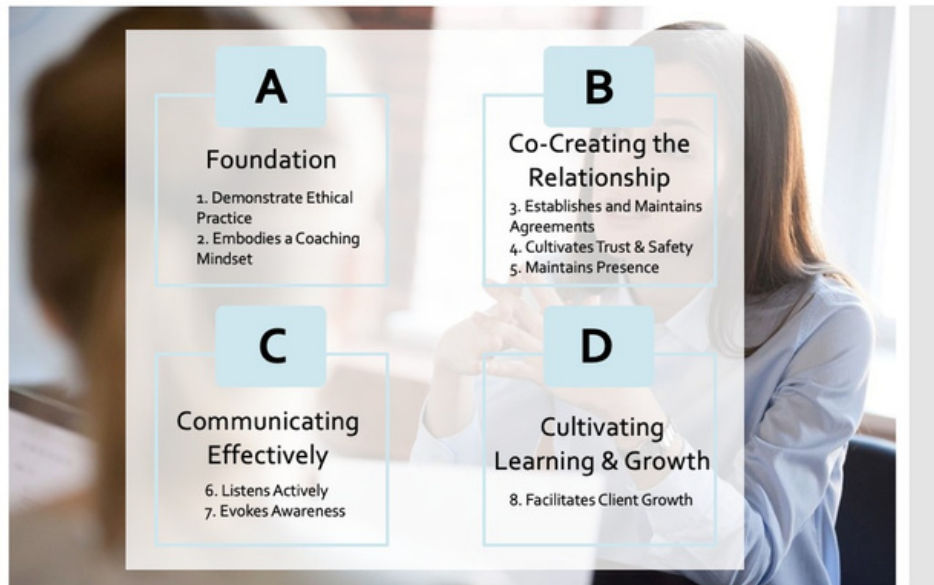
*"I help leaders and entrepreneurs break through limiting beliefs and build successful careers. With a decade of experience running my own private practice as a professional certified coach and leadership trainer in Waterloo, Ontario, I know what it takes to create a thriving business. I understand that strategy, focus, and self-awareness are fueled by a growth mindset. I leverage my education as a **credential coach, a seasoned entrepreneur, and a registered psychotherapist** to help my clients **overcome their doubts, find their motivation, and tackle their biggest obstacles**. I've helped **hundreds of clients** find their way forward to actioning transformative outcomes. Let's connect and co-create solutions that **work for you.**"*



Branding Yourself as a Coach

Do you follow the [8 ICF Core Competencies](#)?

COACHING
SESSIONS:
HOW DO YOU
DESCRIBE THE
STRUCTURE?



Do you follow the ICF Core Competencies? Are you a member of the International Coaching Federation (ICF)? Want to learn more? If you haven't done so already, please consider attaining a coaching credential. See the [ICF website](#) for details.

Please download a copy of the 8 ICF Core Competencies from the Course Material section of the learning portal.

Marketing: How are you talking to potential clients about what you do? You will want to position yourself as a professional, trustworthy, and confidential strategic thinking partner for your clients. For more information about the ICG COTBx Fast Track Coach Training program, please contact the Admin Team and [Book a call](#).

The **ICF (COTBx) training** positions you for success in attaining an ICF accreditation. It is important to know your strengths, be able to succinctly articulate your unique value proposition using a coaching bio and an elevator pitch – all part of marketing yourself as a coach. You want to be able to answer the question of how you can help your client by providing the structure around your coaching and identifying the problems you help your clients solve.

6

MODULE SIX

Reminders to Keep in Mind

Know your strengths and let your target client know about them
You are the best cookie baker, and you need to get the word out!

Stay relevant with your target audience

Do your homework

Research

Identifying the problem you are going to solve (e.g.,) who needs cookies and can't afford them.

Revisit your client avatar

Create and elevator pitch. You have about 10 seconds to make an impact and get a meeting.

Tap into your network

Collaborate with non-competitive businesses (like [Business Network International](#) or BNI)

Ask for referrals

Use social media

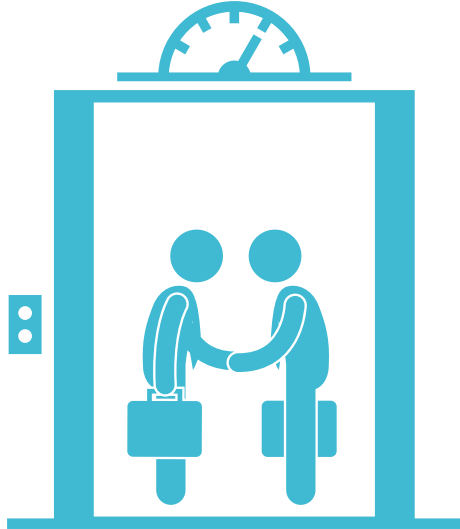
Consider the social media your ideal client uses



6

MODULE SIX

Craft Your Elevator Pitch



Consider these questions when crafting your elevator pitch

- Who is your client?
- What you do for your client?
- Why is your coaching service needed?
- How do you do it?

FILL IN THE BLANK

"I work with (insert client profile) _____

who struggle with (insert client challenge)

and would like to (insert the results they would like to experience)

What separates my service from others is that I (your unique selling proposition or what makes you better or different)

and because of this, clients receive (insert their greatest aspiration/motivation)



6

MODULE SIX

Plan For Your Get Acquainted Calls

Use the **A.L.R. Method (Ask, Listen, Record)** is a skillset that will serve you well in your get acquainted and coaching intake calls. It can also make marketing easy and fun. It involves asking thoughtful questions that helps you to identify what keeps your client up at night and to understand their pinch points and top challenges.

ASK

Use **Level 3 Listening** which is all about listening deeply to the other person.

Ask questions such as:

- *What is your experience with... ?*
- *How does that make you feel... ?*
- *What else does this impact in your life?*
- *What's your biggest challenge?*
- *What would you do anything to change?*
- *If you could change it, what would be different?*
- *What else would become possible if...?*

LISTEN

Actively - It is important to actively listen for the meaning or essence of what your client shares with you. It isn't about solving or fixing your client's problems. As coaches, we assume the client is resilient, capable, and resourceful.

RECORD

Take notes during or immediately after your conversation. Try to capture what your client said using their words. Doing so will help you be better positioned to reflect to them what you heard. It is a way of acknowledging them and letting them know that you are deeply listening.



6

MODULE SIX

Website Platforms For Coaches

When you're starting a new business, it is helpful to have an online presence. A **coaching website** is an important way to market your services to your ideal clients, grow your audience, and ultimately sell more coaching services and related products.

Nowadays, there are beautiful and easy ways to set up website templates through service providers such as [Squarespace](#), [Wix](#), [Wordpress](#), [Showit](#), and [Lovely Impact](#), which offers specific websites for coaches.

Additionally, we can help you set up your website and provide graphic design support. Please see the **Learning Portal** for details.

As part of the **Business Plan Questionnaire**, you were asked to review 3 to 5 websites as part of a competitive intelligence exercise. Please review these two life coach websites

- Marie Forleo's [website](#)
- Dan Mangena's [website](#)

Capture what you noticed were the strengths of each website and watch for marketing criteria like use of headshots and photos, being a source of inspiration, blog content, videos, testimonials, and their ability to build trust and credibility. Add anything else

Marie Forleo	Dan Mangena



Social Media Presence

While this module only touches on **social media**, it is prudent to mention that it **can be a valuable marketing tool** to connect you with potential clients, build an audience, share your chocolate chip cookies with the world in a way that you might be able to do with more traditional marketing methods.

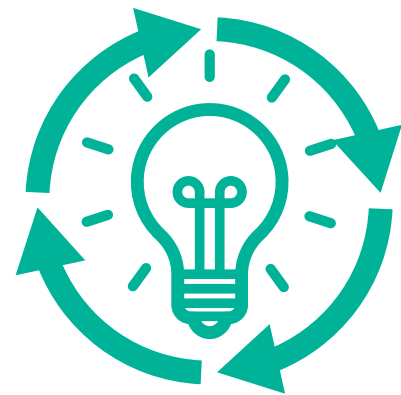
THERE ARE THREE KEY PILLARS OF SOCIAL MEDIA STRATEGY



**Quality Content
Creation**



**Building
Relationships**



**Creating
Consistency**

When you completed your **target client/ideal client avatar**, you did the work of answering questions specific to the three pillars of social media strategy. Please return to the notes you captured for your target client to ensure you can identify their biggest challenges and the solutions you're able to offer.

With social media, it requires active engagement to build strong relationships with your audience such as commenting on posts, providing helpful insights and guidance, and looking for opportunities to be generous with other content creators. Ideally, with social media marketing, there is a need to post and share high value content several times a week (e.g. 3 times a week). There are helpful automated scheduling platforms such as [Hootsuite](#), [Planoly](#), and [Buffer](#) which make this commitment easier and simpler to honour.

[Evercoach: Ultimate Guide to Social Media](#)

6

MODULE SIX

Where Are You Now?

**Where are you with your coaching business?
(Number and types of clients you have/hours you work)**

**Where do you want to be?
(Revenue, hours you work, in what timeframe, how you'll feel and "be" etc.,)**

**How will you get there?
(Setting SMART goals, maintaining boundaries, practicing self-care, how you use your time, delegation, etc.,)**



Congratulations!



You did it!
You finished the program
You're amazing!

Next Steps

1. Complete the course evaluation.
2. If you registered for the Silver Package of this program, your mentor/business coach will contact you to arrange for your first session.
3. If you registered for the Gold Package, you will be contacted regarding the media training program. You can register at any time for the media training program. Please contact our Admin Team for details.
4. Get help building your website. Contact our Admin Team for details.
5. Secure your social media support and/or graphic design support. Contact our Admin Team for details.
6. Finalize your [Business Plan Questionnaire](#)
7. Celebrate your success!



What's Next?

Please complete the **course evaluation**. Your feedback is important to us and we take each comment seriously and make revisions to the course material regularly. If you've purchased the Silver Package of this course, your mentor/business coach will contact you to arrange for your first coaching session.

If you purchased the Gold Package of this course, you should receive an email with the details for your participation in the media training course.

If you'd like to attend the Media Training Course but have yet to register, please contact the Admin Team for details.

The Media Training Course is recommended as your next course to expand your presence, both online and using traditional media outlets. To learn more about the Media Training Course please contact our Program Advisor.

[Book a call.](#)

Appendix

Pg 16: [Paperbell: Coaching Life Industry Statistics](#)

Pg 17: [IBISWorld: Market Research Reports - Life Coaches Industry](#)

Pg 87: [The Coaching Tools Company](#)

Pg 87: [Hotpmo](#)

Pg 88: [15 Coaching Techniques That Work For Any Niche or Client](#)

Pg 115: [Evercoach: Ultimate Guide to Social Media](#)

CELEBRATE YOU!

You've done it!

**Congratulations on completing
The Business Builder Program – For Coaches.
We really enjoyed sharing and learning
with you each week.**

