

Eight Steps to Create Your Ideal Coaching Practice

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Course Purpose and Preparation



“Success occurs when opportunity meets preparation.” Zig Ziglar

Welcome to this course, a step-by-step guide to encourage and enable you to establish, grow and profit from your business, to experience the fulfillment and joy of coaching your ideal clients and to make your meaningful contribution to the world. We're here to help you progress and prosper by sharing some basic business-building steps, core coaching competencies, self-management and time management techniques and inspiring words of wisdom from many masters and great beings who came before us.

This program provides many references, articles, tools, documents, printable forms and other resources that you can select from as most useful and relevant depending on your interests, needs and unique learning style. At the end of each chapter are many questions to prompt your thinking and help you apply what you've learned and found valuable. Keep notepaper or a journal to answer only those that interest you. If you'd like to connect with me or another coach taking this course (for help, discussion or practice) or have any questions or comments, please email kt@KristinTomczak.com. We'd love to hear from and help you!

We designed this course to help newly certified and experienced coaches who come to us full of hope and ideas, yet loaded with questions and concerns about starting their business, such as: “Now that I'm certified, what do I do next?” or “How do I find my purpose and niche?” or “I know how to coach a client, but haven't a clue how to get a client!” and “The very thought of ‘business building’ scares me. What simple steps can I take to set up my business so I can focus on and enjoy coaching my ideal clients?” These and many other questions are covered in this course.

Business Coach and Leadership Mentor Steve Mitten, MCC, writes about the three realms of mastery, essential for continual success, which are mastering business building, mastering coaching competencies and mastering ourselves and all aspect of our lives.

Coaches who own successful practices advise we must understand [the purpose of a business](#), learn the basics of business building, working each step sequentially and consistently, and to have our own coach or support group to provide the clarity, confidence and motivation that we need to accelerate our success. Business experts advise we must know and fulfill our customers' needs, have a clear business vision and purpose and continually invest our time and resources to become aware of and learn:

- How to acquire the entrepreneurial mindset and take on its responsibilities
- How to attract enough qualified customers/clients to sustain a business
- What's going on in the world that captures our interests and passions and what problems we can solve for our customers by determining where our skills, talents, personality and purposes can be best applied
- How to keep improving our business, our clients' results, and ourselves

New and experienced business owners have a better chance of success by knowing the potential risks and common pitfalls they could face, to ensure they avoid them. [Forbes.com reports](#) that 8 out of 10 business start-ups fail within the first 18 months. The [USSBA reports](#) that 80% of small business start-ups do not survive the first year, and about half of the remaining 20% survive less than five years.

This harsh reality is not only unfortunate, but in too many cases it is unnecessary and avoidable. What a disappointment and great loss for those aspiring business owners (and those counting on them) who try their best, then hit some wall and give up. They lose not only their business, time and money but also their hopes and dreams. Winston Churchill saw such loss as a genuine tragedy when he wrote:

“To every person there comes a time in their life,
that special moment when you’re figuratively tapped on the shoulder
and offered the chance to do a special thing, unique to you and your talents.
What a tragedy if that moment finds you unprepared or unqualified
for that work which could have been your finest hour.”

Coaches are very special people who do such meaningful work. So to help you be more prepared and qualified for your special work, unique to you and your talents, that can be your finest hours, this course was created in the hopes of providing you with some useful tools, techniques and inspiration, gleaned from troves of sage advice and wisdom from many masters in coaching, in business and in life-improvement, that have helped me and other professionals build successful businesses.

In preparing to go through this course, you may want to print it out, put it in a 3-ring binder into which you can add extra pages to take notes, list ideas and questions that come up, and keep track of what you’ve accomplished and what more you have to learn and get done. Keep in mind (and on paper) your passions and purposes for becoming a coach. As you progress through the course, you’ll feel more confident and prepared to enjoy each session with your clients who will fill your prospering coaching practice!

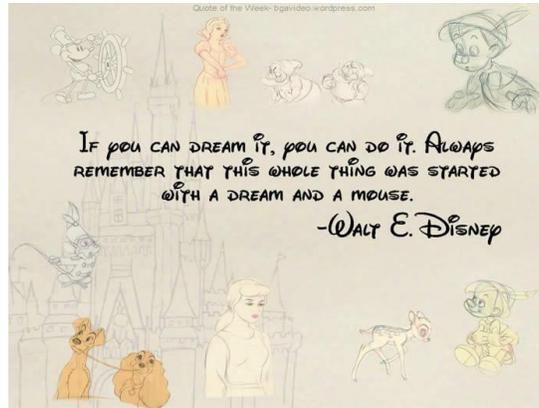
The steps in this course are positioned sequentially, just as any firm structure is built from bottom to top; each step built upon the previous one. Building a business (as in building a house) can take hard work and patience, so to get a good footing, first complete Step 1 (including some or all of the Q&A), then move on to Step 2, etc. It’s natural in any adventure or enterprise to experience doubts, so to prevent any of them from blocking our progress, we can [embrace doubt as an opportunity](#) by changing a roadblock into a surge ahead.

We refer to many resources in this course. Two books specifically about building a meaningful, profitable, stress-free coaching practice are [Marketing Essentials For Coaches](#) by Steve Mitten and [The Prosperous Coach](#) by Rich Litvin and Steve Chandler. Two others we refer to often in this course are Dr. Stephen Covey’s best sellers: *The 7 Habits of Highly Effective People* and *The 8th Habit: From Effectiveness to Greatness*.

As you go through this course, you’ll see we’ve aligned each of the *Eight Steps to Create Your Ideal Coaching Practice* with the 8 Habits that Dr. Stephen Covey presents in his two books. Also aligned with and woven into this course are the Core Competencies (see page 50) of the [International Coach Federation](#), who sets the global standards for our profession. This chart outlines the framework of this course:

8 Steps to Create Your Coaching Practice	Covey’s 8 Habits	ICF Competencies
Step 1: Build a Strong Foundation	Habit 1: Be Proactive	A: Setting the Foundation
Step 2: Clarify Your Vision, Values and Mission	Habit 2: Begin With the End in Mind	
Step 3: Determine Your Ideal Clients and Niche	Habit 3: Put First Things First	
Step 4: Promote Your Services and Offers	Habit 4: Think Win - Win	
Step 5: Convert Your Prospects to Paying Clients	Habit 5: Seek First To Understand	B: Co-Creating the Relationship
Step 6: Connect with and Coach Your New Clients	Habit 6: Synergize	C: Communicating Effectively
Step 7: Set and Achieve SMART goals	Habit 7: Sharpen the Saw	D: Facilitating Learning and Results
Step 8: Empower Yourself and Others	Habit 8: Find Your Voice/Inspire Others to Find Theirs	

About Your Hopes and Dreams



Let's begin by getting in touch with your hopes and dreams for your life and your coaching business. As you develop a clearer vision of what you want your life to look like and what you have to offer the world, you will be closer to having it all!

Sometimes our hopes and dreams are clear and exciting, sometimes not. One time when I found myself quite disillusioned, skeptical and unclear about my own hopes and dreams, my coach helped me first with these Webster's definitions: "hope: a feeling of desire and expectation for a certain thing to happen" and "dream: a cherished aspiration, ambition, ideal, goal or intention". He then had me recall abandoned hopes and dreams that I'd like to restore, those I had currently and what in the future I'd like to achieve. His revitalizing and valuable coaching cleared the way for me to discover, at this new time in my life, what I truly needed, desired and expected to happen and what I cherished as most valuable and important to create for my life.

To gain more clarity and a broader sense of what you want to accomplish and for what purposes, take a quiet moment to consider the questions below, and begin writing some answers, if only with a few words or concepts at the outset. You can revisit and expand on your answers while going through this course. Thoughts and memories of abandoned hopes and dreams may come up; note those you'd like to restore. As you continue to learn and grow, you can expect new ideas to arise! Some of these and other questions in this course may be helpful for your clients, too!

Q&A: About Your Hopes and Dreams

1. Imagine your ideal life: you have all the free time and unlimited money, resources, encouragement and support. If you could do anything, what would that be and look like?
2. What lingering goals and desires do you want to achieve and fulfill? (Health, education, financial, career, fun/recreation, relationships, contribution, spirituality, love, family, home, lifestyle, possessions, etc.)
3. What prompted you to become a professional coach?
4. What does success look like to you?
5. If you were certain you would succeed, what difference in the world would you make, and for whom?
6. What would your ideal business look like? Who would be your ideal clients? What services and products would you like to offer them? What would your ideal office hours and ideal monthly income be?
7. How would having your ideal career/business contribute to your overall sense of living a fulfilled and meaningful life?

About Your Strengths and Opportunities



Before you take a trip, build a house, create a garden, or grow a business, you must first know your starting point, what tools and skills you already possess, and what you yet need to proceed. Your awareness and clarity in these areas will determine how you plan to travel, build, create or grow that which you desire.

As you venture forth into your coaching business, take the time to examine your strengths, weaknesses, options and opportunities, as well as any threats to your business success, as the effort expended will pay huge dividends. This [International Coach Federation article](#) explains the value of a periodic SWOT Analysis confirming why “Every Coach Should Use This Tool to Boost Their Business.”

[Knowing what you're especially good at](#) and what brings out the best in you can determine your success in any endeavor. Webster defines strength as “physical power and energy; the capacity to withstand force or pressure; the good or beneficial qualities or attributes of a person or thing; the emotional or mental qualities necessary in dealing with situations or events that are distressing, difficult or challenging.”

There are many ways to determine your strengths, including consulting one's own ‘inner-knower’ by self-reflection or taking tests and assessments. One popular assessment that has helped millions of people discover their strengths is the [CliftonStrengths Assessment](#) found online or in the *Strengthsfinder 2.0* book, both based on over 40 years of Gallup research. I can readily attest that the book and assessment have been invaluable for me and my clients. Many professionals, having discovered their strengths, enhance their work or expand their practice by becoming a Strengths-Based coach!

Knowing our weaknesses is important to ensuring that we don't waste our valuable gifts, resources or precious time engaging with people or in activities that drain our energy or enthusiasm. A weakness can turn into a bad habit which we can then commit to change. In business, realizing we're weak in marketing, writing, organization or financial management, for example, can motivate us to seek help from those more qualified and capable.

“Without doubt, the most common weakness of all human beings is the habit of leaving their minds open to the negative influence of other people.” Napoleon Hill

Knowing the opportunities that come before us, and those that we can bring to others, can be vitally important to the manifestation of our desires, goals and dreams. We can examine and evaluate them to determine if the investment of our time, money and resources make them worth pursuing; and if so, then we can be prepared to seize them. Lost opportunity can result in financial loss and deep regret. Here is [an article on ways to respond to opportunities](#) that you generate or that come your way.

Knowing the potential or actual threats to your business or livelihood is vital to prevent possible exposure, loss, damage or closure. Surveys list common threats such as changes in the economy or client needs, new regulations, sluggish demand, lack of capital, lack of knowledge or talent, competition, slow payments, disgruntled clients, incompetent help or technical breach/breakdowns. Most often noted is lack of leadership which ripples down, threatening every activity and resulting in chaos and loss. The more we know our threats, the more we'll be able to prevent them, thus increasing the likelihood of our personal and business success.

Knowing your SWOT Analysis

		SWOT ANALYSIS	
		FAVORABLE	UNFAVORABLE
INTERNAL	S STRENGTHS	What are your strengths? What do you do better than others? What unique capabilities and resources do you possess? What do others perceive as your strengths?	W WEAKNESSES What are your weaknesses? What do your competitors do better than you? What can you improve given the current situation? What do others perceive as your weaknesses?
	O OPPORTUNITIES	How can you take advantage of current trends or conditions? What opportunities are available to you?	T THREATS What trends or conditions may negatively impact you? What are your competitors doing that may impact you? Do you have financial support? What impact do your weaknesses have on the threats to you?
EXTERNAL			

Q&A: About Your Strengths, Weaknesses, Opportunities and Threats

The many questions below (as at the end of each chapter) are posed for your consideration, to prompt ideas, perhaps to discuss with a coach or learning partner. No need to answer all or get them done in one sitting.

Strengths

1. What are a few inner strengths that have helped you overcome challenges in your life?
2. What do you do really well, when you are at your best?
3. What special knowledge, talent, expertise or experience do you have?
4. What training, credential or certifications do you have?
5. What are a few of your significant achievements/accomplishments?
6. What makes you or your business unique?
7. What valuable services or products do you have to offer?
8. What have you been successful at that you could incorporate into your business?
9. What assets and resources are available to support you and your business?
10. What might your best friend say are your top strengths?
11. What have people admired about you?
12. Who or what empowers and supports you, and how?

Weaknesses

1. What knowledge, talent, skills or resources do you need to improve?
2. What help and resources do you need but do not have yet?
3. Are you confused about your target market or niche?
4. Do you feel comfortable expressing your value and asking for payment?
5. Do you have insufficient education or experience to feel qualified to coach confidently?
6. Do any past disappointments or failures cause self-doubt or hold you back?
7. Are you lacking sufficient capital to launch or grow your business?
8. Would it be difficult financially to hire someone to assist, coach or mentor you?
9. Are you burdened with debt; or are you wasting your time or money on anything?
10. Can you be exposed to any risk or liability? (ex: lacking financial records or legal contracts)
11. How organized is your work space? (ex: cluttered desk or unfinished projects)
12. What other weaknesses would you like to eliminate or strengthen?

Opportunities

1. What do you see other coaches doing/offering that inspires you to do as well?
2. Are there any events to attend or groups to join to expand your network?
3. What trends, such as social, economic, professional, might open possibilities for you?
4. Are there new target audiences whose problems you could help solve?
5. What pro-bono or volunteer opportunities interest you?
6. Who do you know that can help you set up or expand your business?
7. Has anyone presented an opportunity to you that you're considering?
8. What programs or products (books, articles, courses, etc.) could you create and offer?
9. What more can you offer to your existing clients?
10. Do you have any testimonials or success stories to share?
11. Who can refer clients to you?
12. What other opportunities are before you now and may be for you in the future?

Threats

1. What obstacles or competition, if any, do you face?
2. Do you have concerns or worries about your future or your business?
3. Is anyone not supporting your dreams and endeavors 100%?
4. Is your computer, programs and accounts virus free and secure from being hacked?
5. Are you current on all the trends and changes in your profession?
6. Do you have a coach-client agreement to prevent any eventual misunderstandings?
7. Do you have any financial or health/stress issues that need to be resolved?
8. Is there anyone or anything that could cause trouble for you or your business?
9. Do you have any unhappy customers or unresolved disputes?
10. Do you have any potential, pending or active threats (legal or otherwise) you're aware of?
11. Do you have any habits, routines or tendencies that could endanger your success?
12. Is there anything else that you consider a threat?

Write an action plan for this coming week/month listing:

One thing you'll do to fortify a strength

One thing you'll do to eliminate (or strengthen) a weakness

One thing you'll do to pursue an opportunity

One thing you'll do to handle a threat to you personally or to your business

List new goals/accomplishments you'll pursue as a result of your SWOT Analysis

Step 1: Build a Strong Foundation for Success



“The important thing is that you must have a strong foundation before you start to save the world or help other people” Richard Branson

Setting a strong and stable foundation by completing these business-building basics will free-up your attention to do what you enjoy most: coaching your clients to their success!

In this chapter, we'll go over what it takes to grow your business as a successful entrepreneur, what pitfalls to avoid along the way and some reasons [why some small business fail to grow or thrive](#).

Research and surveys report that 8 out of 10 small businesses fail within their first five years. US Census and Small Business Administration reports concur with Forbes that “A small percent of failure is due to external or economic reasons. Primarily, it's a lack of knowledge and know-how from the top: weak leadership, misunderstanding entrepreneurship, poor business planning, deficient start-up and operating costs, lack of organization structure, overwhelm and burnout, thinking one can do it on one's own, poor market research, no differentiation in the market, and not being really in touch with customers through deep dialogue (tweets/blat emails don't count), for your customer holds the key to your success deep in their pain, behavior, dreams, values and the jobs they are trying to accomplish.”

To help you avoid such pitfalls, in this course we cover entrepreneurship, business and financial plans, marketing essentials, client acquisition and retention and ways to stay on-purpose, motivated and well organized so you can fully enjoy the meaningful work you do as a successful coach.

Be Proactive in building a strong foundation for your business

Covey's [Habit 1: Be Proactive](#) is more than being active or busy. It's a way of thinking, planning ahead, taking the initiative, creating or controlling any situation by causing something to happen, rather than just responding or reacting after something happens. Being proactive is being intentional, taking charge of one's life and business.

Make that phone call, don't wait for it. Be the change-maker, not the complainer. Consider the consequences before speaking or acting out. Anticipate outcomes, don't be surprised by them. Make well thought-out decisions as part of a broader, long-term plan for your life and for building your business from the ground up. For shorter-term plans, you may want to have a daily checklist to follow, as does a pilot preparing for take off.

Inspired by Buckminster Fuller who noticed how even the slightest adjustment to a ship's trim tab changes the ship's direction significantly, Covey advises us to find ways to [“Be a trim-tab”](#) by making small, consistent, daily improvements which can cause a significant positive change in our own and others' lives, in any business, or for the world.



Per Dr. Covey, we all response-able for our reactions and we have the response-ability to exercise our freedom to choose how we respond in any situation. He says all humans have four endowments: self-awareness, conscience, independent will and creative imagination, which give us the freedom and power to choose, to respond and to change.

He shares the story of Viktor Frankl, a Jewish psychiatrist who survived Nazi concentration camps and who realized that we can always choose our response, no matter what happens to us. According to Frankl, the way a prisoner imagined the future affected his longevity.

In his book, *Man's Search for Meaning*, Frankl said: "Everything can be taken away from a man but one thing: the freedom to choose one's attitude in any given set of circumstances, to choose one's own way." He survived the camps by holding on to his vision of teaching his university students after being released from the camps, which continuously restored his will to live. After his release, he returned to his university students, just as he envisioned. Frankl became a famous author, inspiration and advocate for human rights, inspiring millions with these words:

"Between stimulus and response, there is a space.
And in that space is our power to choose our response.
And in our response lies our growth and our freedom."



What it takes to be an entrepreneur

Successful business owners and entrepreneurs are proactive. Barbara Corcoran, famous TV show Shark Tank star, a brilliant woman who started with little yet created her own real estate empire, observes these ten traits in the most successful entrepreneurs who are:

- | | |
|--------------------|--------------------------------------|
| 1. Resilient | 6. Opportunistic |
| 2. Ambitious | 7. Able to size up people accurately |
| 3. OK with risk | 8. Good salespeople |
| 4. Problem solvers | 9. Lousy employees |
| 5. Street smart | 10. Fiercely competitive |

Personally, I'd add a few more like passionate, persevering, patient, prudent, disciplined, and flexible to her list. [Barbara Corcoran's Entrepreneur IQ test](#) may help determine if you'd be a great entrepreneur-coach. You may find that you'd be better suited as an internal coach for a company or another coach's business; or to partner with or hire someone who complements and fills your needs. What would you add to her list?

Being proactive in, and aspiring to have, any or all of these entrepreneurial traits is applicable whether you own your business or work in one. As Brian Tracy wisely wrote:

As the leader of your own life, career or your own business, you are responsible for setting and achieving your own goals. You are responsible for setting priorities and working on key tasks allowing you to make things possible. You are responsible for maximizing and optimizing both the time and knowledge you have available to you. As the leader, you must take action continuously, aggressively, determinedly in the direction of your most important goals and objectives. No one can do this but you; and if you do these things well, your future and success in your life is guaranteed.

Your business start-up checklist

Building a strong foundation for any structure requires getting the right framework and building blocks set firmly in place to build upon. Building a business as well requires that its infrastructure must be built correctly, firmly and sequentially to build up from, each piece built upon the prior, so it can be fully ready to launch, open its doors, welcome and serve its customers.

A Coaching Business Start-up checklist is on page 52 for you to check off what steps you have done and to plan and prepare for the ones you can get as soon as possible.

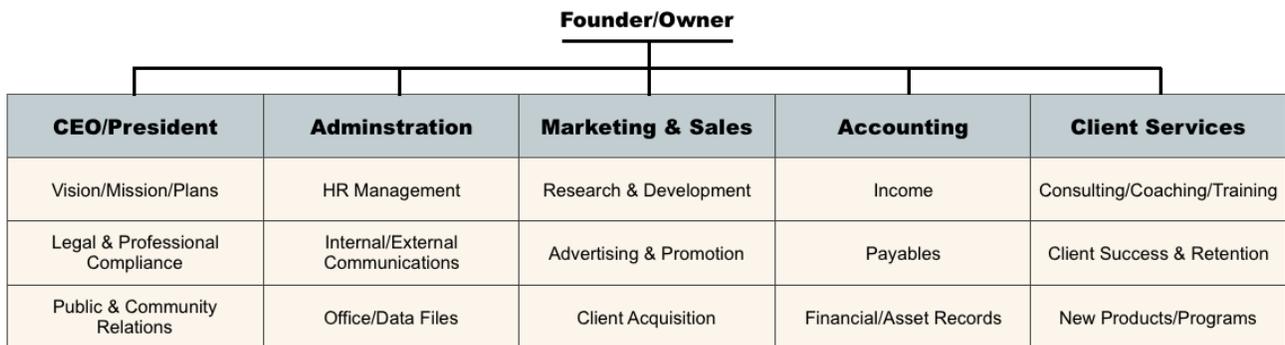
Organizing your business

Just as great sports teams are well organized groups of players who know their goals, roles, functions and strategies, the same goes for a coaching business. Whether you're a team of one or many, there are roles and functions essential in running a business.

Michael E. Gerber, renowned entrepreneur and author of *The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It*, advises "Organize around business functions, not people. Build systems within each business function. Let systems run the business and people run the systems. People come and go but systems remain constant."

Below is an example of a consulting/coaching business organizing chart. Under the Founder/Owner at the top are five columns that represent the major roles and functions that all business owners are responsible for. Successful entrepreneurs proactively organize their time efficiently to ensure that each area is functioning at its best, or they may delegate or contract out some of these functions to someone more capable. In either case, owners are responsible for the optimum performance in all these areas:

- CEO/President (Vision/Mission/Plans – Legal/Professional Compliance – Public/Community Relations)
- Administration (HR Management – Internal/External Communications – Office/Data Files)
- Marketing & Sales (Research & Development – Advertising & Promotion – Client Acquisition)
- Accounting (Income – Payables – Financial/Asset Records)
- Client Services (Consulting/Coaching/Training – Client Success & Retention – New Products/Programs)



“For every minute spent in organizing, an hour is earned.” Ben Franklin

To start building a strong foundation for our business, we must be proactive, know what it takes to be an entrepreneur and properly set up and organize our business to grow and manage it efficiently.

Most professional coaches build their strong foundation by incorporating the International Coach Federation's Core Competencies (page 50), their [Code of Ethics](#) and by having a [coach-client agreement](#) in place (pages 62-63). Successful coaches learn, practice and aspire to the global standards set by the ICF.

The first set of ICF Core Competencies is:

A. Setting the Foundation:

ICF Competency 1: *Meeting Ethical Guidelines & Professional Standards*: Understanding coaching ethics and standards and applying them appropriately in all coaching situations.

ICF Competency 2: *Establishing the Coaching Agreement*: Understanding what is required in the specific coaching interaction and coming to agreement with the prospective and new client about the coaching process and relationship.

**"You were born to win, but to be a winner,
you must plan to win, prepare to win, and expect to win."** Zig Ziglar



Q&A: Step 1 Building a Strong Foundation

1. What is one recent example of you being proactive? How did that make you feel?
2. From Barbara Corcoran's list of 10 traits, do you feel you have what it takes to be an entrepreneurial business owner? Which traits do you have and which could you develop?
3. Using the Business Start-up Checklist, check off the items you have completed. Choose and prioritize which items you'll get done this month and by what specific date. Note whose help you need and schedule getting it.
4. In organizing your business, which functions can you do, and which might you delegate to someone else? How might you schedule your time to ensure that every area is functioning well?
5. Read the ICF Competency 1: Meeting Ethical Guidelines & Professional Standards. How does using the Code of Ethics set a strong foundation for your coaching business?
6. Read the ICF Competency 2: Establishing the Coaching Agreement. How does having Coach-Client Agreement set a strong foundation for your coaching business?
7. What might a coach's business look like that 1) does not have a functional organizing chart and 2) does not incorporate a professional Ethics Code or Coach-Client Agreement?

Step 1a: Create Your Business Plan



“If you fail to plan, you are planning to fail.” Ben Franklin

For any venture or business to succeed, it's essential to have goals, purposes, plans and strategies and to take consistent, effective and efficient action for growth. Before you figure how to get to where you want to go, you have to know where you're starting from and what you have to get you there.

Starting a business is like building a house. Imagine the quality of a house that was built without a plan. Or taking a trip: imagine getting in the car, driving off, not knowing where you want to go; or if you do, not knowing the best route to get there? You could take off with little or no preparation, no map, gas, money, supplies or idea where you're going, keep driving and take your chances. Or you can carefully plan ahead and be fully equipped and prepared for anything that could happen on your trip. A business plan is a roadmap that guides you, avoiding jams and barriers, most efficiently and swiftly to your destination.

Aviators know that for every one degree traveled off-course for 60 miles, a plane will land one mile off-target from its intended destination; off-course for a few minutes, it could end up in a different country. We'd be wise to keep this 'one degree' concept in mind as we venture through life and our businesses! Best to stay 'on-course' by having clear goals and purposes, making strategic plans, prioritizing the right action steps and efficiently managing our time, as we concurrently cultivate our talents, resources and relationships.

Your business plan is your strategy guide that outlines the nature and focus of your business, what you can expect to accomplish, and how. It clarifies your business vision, mission, goals and objectives, and lays out your financial and marketing plans and action strategies. Here are a few ways to do a business plan:

Karyn Greenstreet, a prominent and excellent small business mentor, advises:

“A typical [business plan](#) for self-employed people should be less than 10 pages. The purpose of a business plan, for a self-employed person financing their own business, is to have a central repository for all strategic thinking about the business for the coming year or two. Here's what should be included:

- Your business idea in three sentences.
- Your target audience and the challenges that your target audience faces.
- The benefits of using your products and services to meet those challenges.
- Your company brand and image.
- Your projected revenue and expenses for a year. If you project more expenses than revenue for the first year, a statement about where the money will come from to pay for those expenses.
- A list of your major competitors, and how you are different from them.
- At least six marketing techniques you're planning to use over the coming year, when you plan to implement them, and what results do you expect from them.
- A list of people who you will need to hire to implement your business plan or marketing plan (unless you have the business skills and time to do the work yourself.”

Here are a few more models to help you with your business plan:

This article [Business Plans Made Simple](#) is a home-based business plan guide.

On page 54 is a Business Plan worksheet to help you design your business plan.

On page 55 is a Business Plan created by my design/marketing specialist (who I highly recommend!).

What's in a business plan?

- Define goals
- Determine objectives to reach goals
- Assess resources and make decisions
- Create contingency plans for managing changes
- Rationally assess operational feasibility and financial viability



Start your business plan today and expand on it as we go through this course. Schedule a time once a week, month, each quarter and annually to review and update it. Acknowledge each step you complete toward your business goals. Update all the goals and results you intend to achieve.



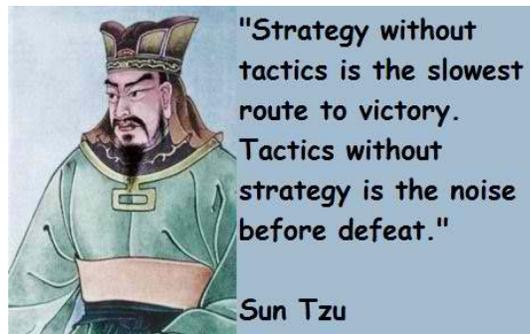
“If you don’t know where you are going, you’ll end up someplace else.” Yogi Berra

“It takes as much energy to wish as it does to plan.” Eleanor Roosevelt

**“Someone’s sitting in the shade today
because someone planted a tree a long time ago.”** Warren Buffett

**"A good plan is like a roadmap.
It shows the final destination and the best way to get there."** H Stanley Judd

“A man who does not plan long ahead will find trouble at his door.” Confucius



Q&A: Step 1a: Create Your Business Plan

1. Sometimes we can get overwhelmed, discouraged or distracted by all the things we have to do in life and to build a business. What 'one-degree' change can you make today to ensure you stay focused and on course to building your ideal business?

2. What habit or routine will you start, continue, change or stop that would most benefit your business growth?

Using the business plan on page 15 or the worksheet on page 54:

3. What is your business idea? Describe what you are building.

4. What are some problems or challenges your ideal clients face that you could help them solve?

5. What are some benefits your clients will gain by using your services and products?

6. How might you design your branding/image that will attract your particular audience?

7. How much will it cost to launch your business; and where will this money come from?

8. What non-recurring necessary expenses must be factored in?

9. How much income will you need to generate, and from what sources, to ensure you exceed your projected expenses each month?

10. What support and assistance will you need, from whom, and the estimated cost, to help you create, promote and manage your business in the coming year?

11. Referring to points 15 and 16 in the Business Plans Made Simple article, what are some obstacles you are facing, and what can you do to handle those?



Step 1b: Create Your Financial Plan



*“Economy has often nothing to do with the amount of money being spent,
but with the wisdom used in spending it” Henry Ford*

Many new business owners make the mistake of underestimating how much money will be needed to launch and grow or having unrealistic expectations of incoming revenues; thus they may be forced to shut down before they even have had a fair chance to succeed.

It is crucial to determine how much money your business will require to start, grow and stay viable. Some businesses take a few months to get up and running, and some can take years. This means that you will need enough funds to cover all costs until sales can eventually pay for them.

This chapter is designed to get you thinking about the basic financial knowledge and data you will need to run your business responsibly and viably. You may need an accountant, or for now just a calculator; but not to worry, only basic math skills are needed to run some numbers at this early stage.

Numerous experts note that one reason for business start-up failure is poor accounting. You cannot be in control of a business if you don't know what is going on. With wrong or missing numbers, a company is flying blind. It is a common misconception that an outside accountant, hired primarily to do your taxes, will keep watch over your business. In reality, that is the job of the chief financial officer, one of the key hats that an entrepreneur must wear when lasting success is the goal.

This [cost of doing business calculator](#) can help you predict how much money you'll need to launch and carry your business until such time that you make sufficient income to cover your expenses.

This [Business Budget template](#) can help you project expenses and required income to ensure your profit and viability. What are your start-up costs? Have you 'loaned' money to your business from your personal accounts that could be paid back by your business? What are your current and upcoming expenses? List every possible expense you may incur on a regular and occasional basis. Keep a current running record of every dollar in and every dollar out on a daily basis. Managing your budget each week will put you in control of building your successful, profitable business.

Q&A: Step 1b Create Your Financial Plan

1. On a scale of 1-10 (10 = total control) how well are you managing the financial aspects of your business?
2. What knowledge or skills do you need to feel confident in managing your personal and business finances?
3. How much income does your business need to generate each month to provide you a reasonable salary?
4. Draw up a basic income and expense projection using a form you prefer or the Business Budget template link above. Include all current and upcoming expenses and costs of doing business. Be sure to include set-aside costs for taxes and savings/reserves. From this projection, how long will it take to show a profit?
5. What are a few income generators that you have planned, such as individual or group coaching, teaching, mentoring, workshops, speaking engagements, online programs, books, being an affiliate, or any others?
6. What other help do you need to feel confident and eager about creating a profitable business year?

Step 1c: Measure Your Results



“In business, measuring what you are doing and picking the measurements that count, like customer satisfaction and performance... you thrive on that.” Bill Gates

If someone were to ask you “How is your business doing?” how might you reply: specifically, vaguely or no clue? The truth would be in factual measurable performance results that are tracked and monitored over time. One business definition of performance is “the accomplishment of a given task measured against preset known standards of accuracy, completeness, cost, and speed.” People become successful by knowing what specific results they want, being accountable for their actions and keeping some type of scorecard that tracks and measures their results in order to improve them. That knowledge, responsibility and control forms the precondition of their success.

A Key Performance Indicator (KPI) is a tangible, measurable outcome that demonstrates how effectively a company is achieving its objectives over time. KPIs help individuals to global leaders defining and measure progress toward their short and long-term goals and objectives. KPI statistics show if and how well you’re on track to attaining your objectives.

Doctors use KPIs to measure our health and well-being at the moment or over time. Tracking body weight, blood pressure and cholesterol levels are important KPIs. Athletes, business owners, scientists, police, financial enterprises and governments, or anyone who is managing performance and results, have KPIs they monitor by the second, minute, hour, day, week, month or year to determine what is working well and what is not. Based on such measurements, one is able to determine the next most efficient and effective action to take to achieve an intended goal or outcome.

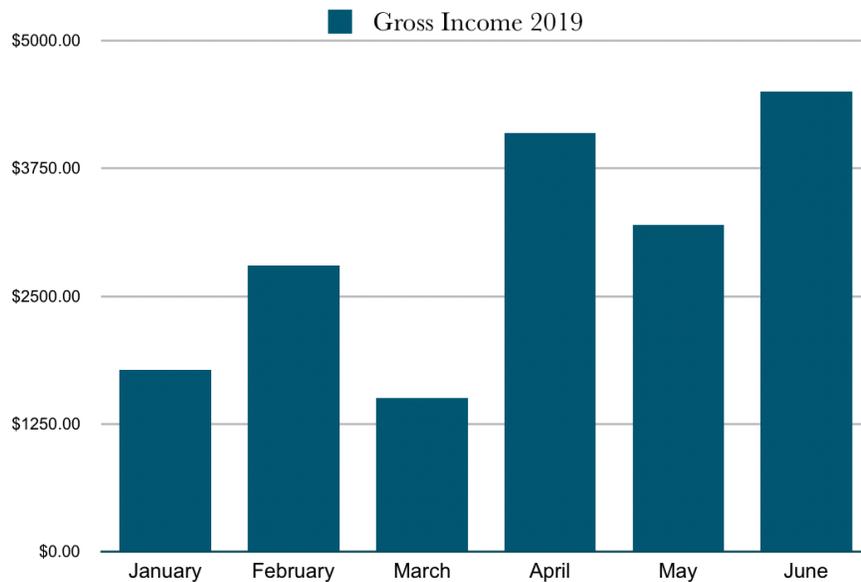
In the same way, it’s wise for us to know and control all aspects of our coaching business using KPI statistics as indicators of our business health and wellness. For example, you can evaluate the results of an ad campaign by the number of leads it generates. Net Profit (income minus expenses) is a bottom line statistic to track monthly to ensure viability.

Here are some business KPIs to track weekly or monthly:

Goals set/achieved	Gross Income	Pro-bono clients
Start-up steps done	Expenses	Paying clients
Promotion activities	Net profit	Testimonials
Referral sources	Programs offered	Clients retained
Leads generated	Sessions scheduled	Coaching credentials
Free sessions given	Workshop attendees	Enhancement hours

Start tracking your progress

Use an online program or graph paper (page 56) to start tracking some KPIs to monitor your own and others' production and results, to keep you aware of and in control of how your business is growing! Here's an example of what tracking your statistics or KPIs can look like:



Q&A: Step 1c Measure Your Results

1. How could you benefit by tracking your business KPIs?
2. In addition to Gross Income, what are a few other KPIs that you could monitor weekly to evaluate the results of your efforts and activities?
3. Using the Gross Income (GI) graph example on this page, set up your own 12 month graph (see graph paper on page 56) to track your monthly GI for this year. How well is your business doing?
4. What personal KPI would you like to monitor, such as body weight, quality time with family or friends, volunteer hours, \$ in savings account, courses completed, or other?
5. What could be some consequences if a business owner does not track important KPIs?

Step 2: Clarify Your Vision, Values and Mission



“Your attitude and your aptitude will determine your altitude.” Zig Ziglar

Many of us become coaches to help others, but are unclear about what we can do for whom or why, or how we can realistically achieve our own goals and desires.

If your vision and mission for your business is vague or incomplete, this chapter can help bring more clarity and confidence in what's most important to you and where you and your business are headed. Having a clear vision and mission statement is vital to one's personal and business success. This chapter contains resources to inspire and guide you toward realizing and understanding your vision, values and meaningful mission.

Knowing what you want your business to become and why can keep you focused and on the right track as you set goals, create plans, make decisions and take effective action steps today and in the future. Just as we wouldn't get into a car and venture out on the road without a specific purpose and destination in mind, we must begin our business venture with a clear purpose and destination, or who knows where we'll end up.

Dr. Covey advises we apply [Habit 2: Begin With the End In Mind](#) to be effective in anything we intend to accomplish. What do you want to see and want to have achieved when you've arrived at your destination?

Vision: Imagine for a moment what kind of life you want for yourself and those you care about, what kind of world you want to live in. If you could be, do and have what you need and want for yourself, those you care about and for the world, what would your ideal life look like? Imagine what it would feel like to wake up one morning to this ideal life!

These same questions apply to your business. By this time next year, where would you like to be, doing what and with whom? Do you have multiple streams of income? How does your coaching business contribute to a better world? Who are your ideal clients, and what are you doing with/for them that makes you smile, satisfied at the end of every day? With whom are you cooperating and collaborating? What do you see yourself doing (coaching, workshops, book signings etc) that excites and motivates you? In a perfect world, where would you be working from during what ideal office hours? Imagine a perfect work day a year or few from now, how would you describe it in detail? How does this all reflect who you really are and what you value most in your life?

Values: When preparing to define your business mission, read this [article about values](#). From this list, which ones stand out for you? Ideally, our values would be reflected in our business. When we start a business or take it to its next level, re-evaluating then prioritizing our personal values can re-inspire and motivate us and who we work with, improve our decisions, save us time, energy and money and improve how we show up in the world. Our integrity, presence and actions will honor our values, which we can express through our coaching business as we help others improve their lives.

Mission: Your business purpose/mission defines the reason your business exists. Your mission statement can express your vision and values to help people understand why you have your business. This is an opportunity to make your business a meaningful expression of your purpose here on earth. Richard Bolles' famous book *What Color is Your Parachute: 2019* has a special orange pages section on how to find our three missions in life. Dr. Bolles was a Minister and career counselor well into his 90s, whose wisdom

continues to inspire those who want their life's work to be based predominantly on one's spiritual calling and divine gifts.

Internally, what do you feel is your true calling? When have you felt at your very best, using your unique gifts and natural talents? What brings tears of compassion and joy? How have you used your natural talents and abilities that brought you a sense of joy or deep satisfaction? One approach is to look specifically at your talents, interests, abilities, experience, what you love to do and can do better than anyone you know. You can look for patterns or interests since childhood, who you've liked being with and helping.

Externally, from a global perspective, what do you see going on in the world that you want to help, support, fix or change? What is that difference you want to make? In the [documentary film "I AM"](#), philosophers and spiritual leaders discuss discovering our mission by observing what ails the world and finding our ways to improve it. These questions echo Ghandi's words of wisdom for us to "Be the change you want to see in the world."

Making that difference or change in the world

In Chapters 1-3 of [The 8th Habit: From Effectiveness to Greatness](#), Dr. Covey presents a global perspective of the problem and pain of personal unhappiness in the world during this significant shift in human history when rapidly growing numbers of people suddenly have more choices and have to manage themselves, how society is unprepared for it and how being effective is no longer optional or enough. Dr. Covey writes:

"The call and need of this new era is for greatness, fulfillment, passionate execution and significant contribution. When you engage in work that taps your talent and fuels your passion, that rises out of a great need in the world that you feel drawn by conscience to meet. Therein lies your Voice, your calling, your soul's code. There is a deep, innate almost inexpressible yearning within each one of us to find our Voice in life and a deep longing to share our voice with others."

Imagine the possibilities when we awaken to and maximize our talents and influence, and fill that missing element in our lives with deep, meaningful interaction and conversation, which is what coaching is all about.

Here are two short TED Talk videos and four articles about making that difference in the world...

[How to know your life purpose in 5 minutes](#)

[Simon Sinek on finding your business 'Why'](#)

[30 Example Vision Statements](#)

[50 Example Mission Statements](#)

[Mission, Vision, Values of the Grateful Living Network](#)

[Mission and Vision Statements of the Beautiful You Coaching Academy](#)



Here is an example of a Coach's Vision Statement that may inspire yours:

I have a clear vision of a better world, I am grateful for my meaningful mission and unique gifts, and how to share them through my coaching business and relationships. I feel more confident using my business plan that keeps me headed in the right direction and a financial plan that has me earning more than enough income to live the lifestyle I desire and contribute to those in need.

I make better decisions by staying aware of my strengths, weaknesses, opportunities and threats, as these can change. I know who my ideal clients are, where their biggest challenges lie, and how to reach them and help them experience the improvements they desire. My practice is growing mainly from referrals and the new programs I add. These help my existing and new clients who are eager to pay high value to achieve new goals and their desired lifestyle.

My positive influence and contact lists grow daily from my outreach, networking, speaking engagements, webinars, programs and books that I create. I enjoy being invited to speak and collaborate with other experts, and am proud to contribute to professional coaching organizations, finding ways to inspire and empower others and strengthen my relationships.

I manage my business well. My coaching skills improve with every conversation. My life is well organized, my priorities are clear, I utilize my time and resources wisely. I continue to thrive, finding ways to inspire and empower myself and others, knowing it provides the safe space for my many paying and pro-bono clients to grow and reclaim their freedom to think for themselves. My business expands and prospers; every day is filled with gratitude, peace and joy.



Q&A: Step 2 Clarify Your Vision, Values and Mission

1. Describe your ideal coaching business as an expression of your vision, values and meaningful mission.
2. What kind of world do you want to live in, and what can you do to contribute to that vision?
3. On page 21 is a link to an article that lists values. Which would you say are your top five values?
4. What do you value most about having your own business?
5. Simon Sinek's TED Talk is about one's 'Why'. How would you write a brief mission statement for your business simplifying essentially what you do, for whom and why?

Step 3: Identify Your Target Audience and Niche



“There is one winning strategy:

Carefully define the target market and direct a superior offering to it.” Phillip Kotler

For a business to grow, it first needs customers/clients. Once you know your most suitable target audience (who needs you and where to find them) and your niche (special talents, skills, gifts, passions, abilities that meet their interests and needs), you will save time, money, effort and resources on honing in on marketing efforts will get faster, better results.

Covey’s [Habit 3: Put First Things First](#) is about putting those things (roles, values, goals, activities, etc.) most important and worthwhile to you as priorities. This habit is a lifesaver for those of us with so many ideas and projects, that we can’t decide easily, can’t say no to others’ demands, or we want to help ‘everyone’ we can. Marketing expert Seth Godin says “Everyone is not our customer.” We risk being confused, procrastinating, wasting our time, or missing opportunities.

Knowing our ‘firsts’ in our personal life and business brings clarity to confusion and order to chaos, resulting in using our time, talents, resources and opportunities wisely, congruent with our values, goals and mission.

Your prime target audience

First we have to identify, out of everyone we want to help, who our best clients will be and what their problem is that we can provide a solution for, and where do their needs meet our solutions because “Customers buy for their reasons, not ours,” per guerilla marketing expert Orvel Wilson. Clearly defining our who and what can save a lot of time, money, and resources, and increase our pleasure, confidence and income.

Watch this video [How To Choose Your Coaching Target Market And Coaching Niche](#), to determine who you can best help and what problems you can best help them solve. Focus on the five W’s: *Who* (age, gender, occupation, income, education, religion, lifestyle); *What* (beliefs, interests, struggles/challenges, desires, needs); *Where* (geographic area, online); *When* (once, monthly, as needed); and *Why* they’d choose you (familiarity, credibility, niche, referral, price, etc).

ICF Credential Coach Deborah Brown-Volkman, in her must-have book *Four Steps to Building a Profitable Coaching Practice: A Complete Marketing Resource Guide for Coaches* states that “Your target audience in all likelihood, will be the people who want to be where you are today.”

Crafting your niche

Dr. Lynda Falkenstein, author of *Nichecraft: Using Your Specialness to Focus Your Business, Corner Your Market and Make Customers Seek You Out* says, “Many people talk about finding a niche as if it were something under a rock or at the end of the rainbow, ready-made. That’s nonsense! Good niches must be created, carefully crafted.”

Many experienced coaches agree that it is not essential, when starting out, to have a specific niche, and that it may take time and experience to discover yours. Once you do focus on what you do best and for whom, you won’t be trying to be everything for everyone, chasing trends or worrying about competition, but can wisely invest your time, money and resources to market efficiently and expand your talents, gifts and skills to better serve your tribe.

Some of these following resources may be inspiring and helpful to craft your niche:

[7 Steps to Defining Your Niche](#)

[Survey results on what clients want](#)

[Find Your Niche.. with These Four Questions](#)

[The Most Critical Part of Your Coaching Niche](#)

[50 Niches in Professional Coaching](#)

Perfecting your ‘elevator introduction’

Now that you have more clarity about your ideal target audience and special niche is, you are better prepared to more clearly and confidently introduce yourself when someone asks what you do. The purpose of a brief ‘elevator intro’ is to make yourself known and establish a new mutually beneficial relationship. Better than a sales pitch, it’s a friendly two-way conversation, concise and compelling enough that you both will want to take the next step such as scheduling a follow-up call, meeting for coffee or engaging in a free sample session. Here’s an example of a response when someone asks her “And what do you?”:

“Thank you for asking! You know how so many of us working women can get overwhelmed and too busy for our own self-care or family? [wait for listener’s positive response..] Well, I specialize in helping working moms, mainly business owners and senior executives, get more done in less time so they can get home early for more self-care and more quality time with their loved ones, so not one precious moment is missed.”



Q&A: Step 3 Determine Your Target Market and Niche

1. How would you answer the five Target Market questions (Who, What, When, Where and Why) on page 24, to help determine who is your ideal target market?
2. To help clarify who you want to coach, Mentor Coach Deborah Brown-Volkman suggests this process, listing a few examples of when you were at your best: Who have you helped in the past? What was their problem/challenge? What did you do to help them? What did they accomplish as a result of your help?
3. Successful coaches can have more than one type of client and niche. Our ideal clients and niches can change over time, as do our lives, experience and interests. At this time, how would you describe both your ideal target audience and your specialty niche?
4. From the “100 Coaching Specialties” and the “50 Niches in Professional Coaching” lists, which few stand out as the most interesting and realistic for you?
5. Draft a brief ‘elevator introduction’ that someone can easily relate to, including who you help, how you provide a solution for them, and the result one could expect from working with you. Use it to introduce yourself to someone. What was their response?

Step 4: Promote Your Services and Offers



“Win-Win is a frame of mind and heart that seeks mutual benefit in all interactions.” Dr Covey

Because coaching is a mutually beneficial interaction based on trust and understanding, let’s consider how Covey’s [Habit 4: Think Win-Win](#) can help us improve our own character, relationships and agreements.

In promoting our services and offers, to first attract potential clients, we must understand and speak to their needs so they clearly see and want the benefits to gain from interacting with us. Such benefits can be clearly stated in our business cards, website, tag line, emails, articles and in how we title our offers such as a free short e-book, consultation or breakthrough session. We need to understand what our clients really need and want, beyond what they say they need and want. Harvard professor and global economist Theodore Levitt wisely noted “People don’t want to buy a quarter-inch drill; they want a quarter-inch hole.”

Attracting your ideal prospects

The first result of any marketing effort is a potential client reaching out to us for more information or ideally to schedule a free consultation/discovery session with us. We each have unique styles and preferences to reach out to our target audience.

From the list below how will you promote your services?

Published		In Person	
Website	Newsletters	Attending events	Free consultations
Brochures	Mailing lists	Speaking at events	Referral partners
Articles	Courses to sell	Seminars & workshops	Joint Ventures
Email with signature	Press releases	Networking events	Affiliate programs
Blogs	YouTube	Radio & TV interviews	Pro-bono work
E-Books & Books	Social Media	Phone calls	Community service

Inviting your audience to a free session

Our published and live promotions ideally will include invitations to our audience to meet in person or by phone for a free discovery consultation or sample session to provide them the personal experience and value of coaching.

Chris Mickelsen's ebook [Red Hot Free Session Offers](#) gives some ‘hot spots’ to find new prospects and 10 examples of sample session invitations. He also provides some concise, creative ways to introduce yourself, for example “I am a weight-loss coach, helping people get thin and stay thin forever.”

This chapter covers ways to attract new prospects and invite them to a free session. In the next chapter we present a few sample session models and how to deliver them to convert your prospects to paying clients.

Interacting with increased awareness

In Covey's Six Paradigms of Human Interaction below, we see the different levels from which people interact with each other. We should apply Win-Win when considering both our customer's needs and as importantly our own. Think Win-Win generates mutual understanding, trust and goodwill, so it is the preferable approach for those who must work together to achieve maximum results.

THE SIX PARADIGMS OF HUMAN INTERACTION
1. WIN - WIN: Mutually beneficial and satisfying for both or all involved.
2. WIN - LOSE: If one competes selfishly to win, both can ultimately lose.
3. LOSE - WIN: Being either a "doormat" or willing to concede when appropriate.
4. LOSE - LOSE: Having another person or people lose, even at one's own expense or loss.
5. WIN: Focused solely on securing what one wants, ignoring what others need and want.
6. WIN - WIN OR NO DEAL: If not mutually beneficial, we agree to call off the deal.

Improving and restoring mutual understanding

Applying Win-Win is helpful in creating new relationships, improving the ones we have, and is also effective and quite liberating for problem solving or conflict resolution in our personal and professional relationships.

While coaching, if we say or do (or fail to say or do) anything resulting in an upset or misunderstanding with our client, we can take responsibility first by changing our thinking to a Win-Win approach then offering an apology, which will facilitate resolution and restore mutual understanding. As Einstein said,

"We can't solve problems by using the same kind of thinking we used when we created them."

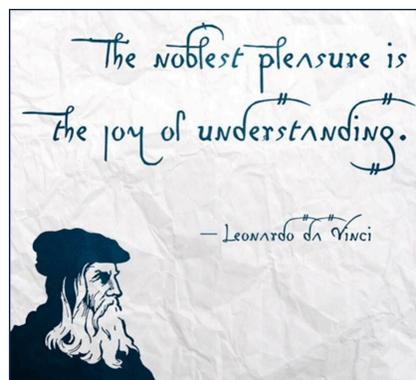
The moment we realize we've said or done something we regret or that offends someone, don't hesitate to clear the air, apologize, and let them know how important they are to you:

First, locate your actual feelings and intentions in the Six Paradigms of Human Interaction.

Then decide what mutually beneficial outcome you can create. (Win-Win is best!)

Then apply this 4 Step Apology Process (many variations can be found online):

1. Admission: "I realize I was wrong/mistaken when I [what you or they think you did]"
2. Apology: "I apologize for [what you did] and did not intend [the effect it had on the person]."
3. Amends: "What can I do to make up any [damage or discomfort] I've caused you?"
4. Re-commitment: "Our relationship is very important to me, so I want to do everything I can to make sure it remains strong. I want to recommit to..."



Q&A: Step 4 Promote Your Services and Offers

1. List some examples of what your prospective clients need and want; what are they truly seeking as a result of coaching with you?
2. How could you apply Think Win-Win when engaging with and offering your services to potential clients, to ensure your needs are being met as well?
3. How can being aware of the Six Paradigms of Human Interaction help you in your personal and professional interactions?
4. Give an example of when Paradigm 6: Win - Win or No Deal is appropriate.
5. From the lists provided on page 26, what are your preferred ways to attract your ideal clients?
6. Where are a few 'hot spots' to find your new prospects?
7. How will you invite someone for a free session?
8. If you make a mistake in a session, how can you apply the 4-Step Apology Process to keep your client engaged and willing to continue? How might this apology process be useful in other relationships or interactions, in and outside of business?



Step 5: Convert Your Prospects to Paying Clients



“The most primary need of the human heart is to be understood” Stephen Covey

In the last chapter we provided ways to promote your services to first attract a prospective client to reach out to you for more information. Once you have that prospect from a referral source or other marketing effort, the next step is to have a free consultation/session which ideally will result in their commitment with payment.

In this chapter we provide a few sample session models in which we make our prospect feel understood, hopeful and reaching out to hire us. To have them feel safe and willing to open up without fear of judgment, consider how applying **Habit 5: Seek first to understand, then to be understood**, with your genuine concern and compassion for whoever is before you, can satisfy that primary need of the human heart.

“The best of life is conversation, and the greatest success is confidence and perfect understanding between sincere people.” R. W. Emerson

You may have heard it said that most people don’t want to be sold anything, or feel forced into buying anything, but most people do like to buy. People buy with their emotions (the relief or pleasure they feel experiencing a free session with you or imagining what they would feel if they had what they need or want). They do want to be understood and helped with getting what they need and want. They want to achieve their goals. Advertising experts say people buy what gives them more pleasure or less pain.

Our role in the sales process is not to push for a ‘close’ but to facilitate the customer’s buying process. Steve Mitten advises us to make it easy for them to say yes. His book provides effective ways to meet, engage and provide a free consultation or session so comfortably and effectively, that it will have them reaching out to you to sign, pay and start.

Once a prospective client senses your genuine interest in wanting to understand and help them, and they were uplifted or inspired by your session, they’ll begin to trust you and welcome your offer to co-create a relationship together, most likely they will become your paying clients.

“Pretend that every single person you meet has a sign around his or her neck that says, ‘Make me feel important.’ Not only will you succeed in sales, you will succeed in life.” Mary Kay Ash

Keeping in mind our ‘first things first’ intention is to co-create a mutually beneficial ‘win-win’ relationship, we then ‘seek first to understand’ a prospective client. Coaches begin to build trustful relationships by applying the second set of ICF Competencies:

B. Co-Creating the Relationship:

ICF Competency 3: *Establishing Trust and Intimacy with the Client:* Creating a safe, supportive environment that produces ongoing mutual respect and trust.

ICF Competency 4: *Coaching Presence:* Being fully conscious and creating spontaneous relationships with clients, employing a style that is open, flexible and confident.

Delivering a sample session

In his *Free Sessions That Sell* script (page 57) and in his book *Get Clients Today: How to Get a Surge of New, High Paying Clients Today & Every Day*, Chris Mickelsen uses questions that determine the prospect's needs, if we can help them and secures their commitment by having them pay at the end of the free session.

Assessments such as The Life Balance Wheel, Clean Sweep Inventory and Tolerations List (pages 58-61) are quite effective to help you and prospective clients discover where they're at, what they need and if we can help them, if the coaching partnership would be a good fit. These assessments are useful as needed with our on-going paying clients as well.

Steve Mitten, in his *Marketing Essentials for Coaches* book, describes his 'no sell' sample sessions. First he asks questions to help potential clients connect emotionally with important goals that really matter to them. Then he demonstrates how coaching can help overcome their principal mental and practical obstacles, and take the necessary steps to make the changes that will lead to their goals. Then he simply says "If you are serious about achieving this goal, I'd really like to be your coach!" No hard sell, push or pull. He simply leaves the decision and next action to the prospective client, trusting that those who are sufficiently ready for coaching will commit.

Rich Litvin and Steve Chandler, authors of *The Prosperous Coach*, often conduct more than one deeply engaging conversation. Rich says "I do not offer 'free' sessions. I do waive my fee for a powerful session for a few people who inspire me, because I build my business by invitation and referral. I rarely spend less than two hours with someone because coaching is deep and has a long-lasting impact. It deserves quality time. Some of the people I coach I never see again. Some make referrals and a few choose to become part of a select group of my extraordinary clients."

Tony Stoltzfus, in his book *Coaching Questions*, provides many conversation starters and effective complimentary sessions. Here is his 5-step free session process:

1. Connect: What led you to pursue a coaching relationship?
2. Motivate: What's the biggest change you'd like to make in your life right now?
3. Present: Would you like an example of how I helped someone similar to you?
4. Inform: I'd like to tell you how our coaching relationship could work (process, scheduling, session structure, in-between sessions, fees etc.)
5. Decide: What step would you like to take next to keep you moving forward?

Making the sale and onboarding your client

There are as many styles and techniques to make a sale out there as there are people selling something, but more important is one's attitude, knowing we're not selling something *to* someone, but selling something *for* someone. To discover your most authentic and effective way to get a client to pay you, it's best to learn from the masters of sales. Watch these videos to learn from their attitude and approach, their tips and techniques:

[Brian Tracy on the Fundamentals of Advanced Sales](#)

[Kevin Harrington and Zig Ziglar on Secrets of Closing the Sale Masterclass](#)

[2019 Top 29 Sales Training Videos from the Pros](#)

Upon delivering a great free session, ideally your prospect will eagerly say "Sign me up! How do I pay and when can we start?" You can then give them a New Client Welcome Pack containing forms to fill out and your coaching contract (pages 62-63) which should include the ICF Ethics Guidelines. Before they pay you, go over each point of your contract to work out the details and to ensure mutual understanding and agreement. Examples of [Coaching Welcome Packs](#) can be found online to gather ideas to create your own.

Once your free session is done and agreements are signed, you are ready to coach your new client!



Retaining your existing clients

Covey's first four Habits and his 5th Habit: Seek First to Understand, Then to be Understood, along with the above Competencies, apply not only to finding and converting our prospects to paying clients, but also and most importantly to retaining the valuable clients we already have. Customer retention is a priority and vital to having and enjoying a stably expanding business.

Survey results report that it's five times more profitable to invest your time, attention and money on retaining existing customers than it is to acquire new ones! Other surveys reveal that of those customers who leave, 66% will do so because of an attitude of indifference to them, no trying to understand them, or no customer-care follow up, towards them by the service provider. So it's wise and prudent for us to make it a priority to retain our current clients, surely to get them back after an absence, before investing so much of our time, money, energy and resources on looking for new ones. Here are words of wisdom from Mahatma Gandhi:

A customer is the most important visitor on our premises.
He is not dependent on us. We are dependent on him.
He is not an interruption in our work. He is the purpose of it.
He is not an outsider in our business. He is part of it.
We are not doing him a favor by serving him.
He is doing us a favor by giving us an opportunity to do so.

Stay positive and keep it simple

Even when things are going great, beware of the self doubt, fears or uncertainties that can creep in with thoughts like 'Am I really qualified to do this?' or 'I'm a failure if I don't close this sale' or worse. As a coach, you know such self-defeating thoughts are barriers that will weaken you and actually stand like a ridge between you and your prospective client that could prevent the sale. Focus on what's going right, enjoy the moment. Present your offer, then back up a touch, allowing some space for your prospect to reach out to you.

Here are two great articles on letting go and keeping it simple and stress free:

[Let Go and Watch Your Sales Soar with the Law of Detachment](#)

[The Zen of Getting Your First Client](#)



Q&A: Step 5 Convert Your Prospects to Paying Clients

1. What thoughts or feelings arise when you think of the terms Salesperson, Closing the sale or Selling? If you have any dislike or discomfort with them or the idea of having to 'sell' something, how will this affect your sales ability? How comfortable or understood will your prospective client feel?
2. How can you make 'selling' or 'closing the sale' an opportunity that you actually look forward to?
3. How could you apply Habit 5 'Seek first to understand, then to be understood' to get a prospective client to want to sign your Agreement and prepay you?
4. From the five types of Free Intro Sessions presented on page 30, which seems to be most natural to you? Which would you prefer to enlighten, engage and enroll a new client?
5. Fill out the Life Assessment Wheel, the Clean Sweep and the Tolerations list (pages 58-61). Which one(s) do you find most valuable and insightful for yourself and your clients?
6. Find someone with whom to practice delivering a free session. First be the coach, then switch roles and be the client. Describe what it was like to be the coach and to be the prospect.
7. What forms do you want to include in your New Client Welcome Pack that are essential in on-boarding a new paid client? Why is it important for the client to fill out the forms?
8. How could any self-doubt or fear of failure prevent you from closing the sale?
9. Read ICF Competency 3: Establishing Trust and Intimacy with the Client. How does this competency help you convert your prospects to paying clients?
10. Read ICF Competency 4: Coaching Presence. How does your coaching presence help you convert your prospects to paying clients?



“Make a customer, not a sale” Katherine Barchetti

Step 6: Connect with and Coach Your New Clients



This is where we begin coaching our clients, discovering and helping them get what they really need and want to be, do and have in all areas of their lives. Through our genuine interest and non-judgmental mindful listening and questioning, we look to create those special connection moments when we are in such accord with our clients that they have their 'Aha!' or 'No wonder why!' moment of clarity and release, a life-changing realization, an epiphany, so that they are free to advance toward whatever their hearts desire. Those special moments of harmony and flow, that synergy and break-through is the gold we as coaches are going for!

Covey's [Habit 6: Synergize](#) in every meaningful interaction, means to reach that harmonic flow of creative cooperation, when two minds, hearts or actions are greater than one. That's when magic happens, something far greater than one could have done alone. When people interact and open to each other's influence, they gain new insight and discover things they'd be much less likely to discover on their own. Webster's definition of synergy is "the interaction or cooperation of two or more organizations, substances or agents to produce a combined effect greater than the sum of their separate effects."

Another word for synergy is 'connection' which author Brené Brown defines as "the energy that exists between people when they feel seen, heard and valued; when they can give and receive without judgment; and when they derive sustenance and strength from the relationship." This togetherness develops trust.

Think of moments you've experienced or observed synergy in action. A symphony, team touchdown, first responders in crises, handshakes for peace, family reunions, being one with nature or the Divine, birds in chevron flight, or (my fave example) Al Pacino as the blind, retired colonel so intently yet gracefully 'coaching' a hesitant young woman to the dance floor, and how their synergy emerges and develops during their tango [in this scene from the movie *Scent of a Woman*](#).

Preparing for your sessions

To ensure we can devote our undivided attention to our clients to reach those moments of synergy and breakthrough, we must be organized, undisturbed and always prepared by having:

1. A private space/office set up with reliable phones, computer, office supplies, client folders, confidential files, and both a time management and a client management/scheduling system.
2. Coaching tools: Here are [47 useful coaching forms](#) to add to those that came with your training and many in this course (pages 51-69) including a Coach's Time Log to record all free and paid sessions and a Client Time Log for each client's folder.
3. Coaching process: Training institutes provide their coaching systems, ideally following ICF standards, including intake interviews, assessments, vision statements, long and short-term strategic planning, goals listing, standard or laser session formats (page 64) and ongoing session models.
4. Proficiency in all ICF Competencies, especially Communicating Effectively which consists of active listening, powerful questioning and direct communication.

Communicating Effectively

ICF Competency 5: *Active Listening*: Focusing completely on what the client is saying and is not saying, understanding the meaning of what is said in the content of the client's desires and supporting the client's self-expression.

ICF Competency 6: *Powerful Questioning*: Asking questions that reveal the information needed for maximum benefit to the coaching relationship and the client.

ICF Competency 7: *Direct Communication*: Communicating effectively during coaching sessions, and using language that has the greatest positive impact on the client.

Listening to your clients

Dr. Bernard Ferrari shares how we can improve relationships, be more efficient and make better decisions in this excerpt from his book *Power Listening: Mastering the Most Critical Business Skill of All*:

"Many people take listening skills for granted, focusing instead on how to articulate their own views more effectively. This approach is misguided Power listening. The art of probing and challenging the information garnered from others to improve its quality and quantity is the key to building a knowledge base that generates fresh insights. The Four Steps that form a good listening foundation are:

1. **Show Respect:** Our conversation partners often have the know-how to develop their own effective solutions. Part of being a good listener is helping them pinpoint critical information and see it in a new light. To harness the power of these ideas, you must fight the urge to "help" by providing immediate solutions. Learn to respect your partner's ability to identify them. Being respectful doesn't mean avoiding tough questions. Good listeners routinely ask key questions to uncover the information needed to make better decisions. The goal of power listening is to ensure the free and open flow of information and ideas.
2. **Keep Quiet:** Get out of the way of your conversations so you can hear what's important. Don't hog the spotlight, try to prove your own smarts or emphasize how much you care. Speak only to underscore your conversation partner's points. Your partner should speak 80 percent of the time, with you filling the remaining 20 percent. Make your speaking time count by spending most of it asking questions, rather than having your say. This may be easier said than done, as most of us are naturally inclined to speak our minds. Still, you can't really listen if you're too busy talking. We've all spent time with lousy listeners who treat conversations as opportunities to broadcast their status or ideas. They spend more time formulating their next response than listening to the conversation.
3. **Challenge Assumptions:** Too many professionals inadvertently act like know-it-alls, remaining closed to anything that undermines their beliefs. Good listeners seek to understand and challenge the assumptions that lie below the surface of every conversation. Holding onto these assumptions is the biggest roadblock to power listening. It's admittedly hard to scrutinize preconceived notions and shake up our thinking. We must be willing to reevaluate what we know and welcome what we don't (or can't) know. Shift your mind-set to embrace ambiguity and uncover what each conversation partner needs from the interaction.
4. **Maintain Focus:** Power listening requires you to help your conversation partner isolate the problem, issue or decision at hand. Discard extraneous details or emotions that interfere with homing in on what truly matters. Create a focused, productive conversation by reducing external and internal background noise. Ask questions that highlight key issues and minimize the urge to stray from them."

Questioning your clients

Coaching experts agree that the most important coaching skills are deep listening and the ability to ask clear, insightful, non-judgmental questions which, posed at the right time, can spark a breakthrough and potentially life-changing moment for your client. From Master Coach Rhonda Hess:

“The right question can do more to motivate a coaching client into playing a bigger game than reading a whole bookshelf of inspirational books or attending several ‘how to’ seminars. Why is that? Questions, when phrased and timed well, entice us to go inside and look around the many rooms of our heart-mind. We emerge knowing ourselves better than we did before. Here are seven great coaching questions to ask your clients, or yourself!

1. What do you want?
2. What’s holding you back?
3. What is it costing you to continue holding back?
4. How do you want to change your mind’s programming on that topic?
5. What new habits will you put in place to fortify your new mindset?
6. What is the most meaningful action you could take now?
7. What new skills or support systems will ensure your success?

These are simple coaching questions, but even the most successful coaching clients will get continual value out of these kinds of questions. The right question can help anyone zoom past obstacles and into a power zone of action and attraction.

Anatomy of a Powerful Question: All powerful questions come from a place of genuine curiosity; they are direct, simple and usually open-ended; they generate creative thinking; they surface underlying information and they encourage self-reflection.

A question is most powerful when neither the asker nor the responder knows the answer until the question is answered. Think about it. If we can ask our coaching clients questions that bring out fresh information, we’ve brought about growth and transformation.

Keeping the Inquiry Alive: What makes the right question even more powerful? When you probe for deeper answers. One question may only scratch the surface. If you want to coach in the most masterful way, take the question to its deepest conclusion by asking the simple follow up question: And what else?

See how this simple follow up deepens the question and draws more from the coaching client:
What do you want? And what else? What’s holding you back? And what else?
What is it costing you to continue holding back? And what else?

The best treasures are buried deep. Try these questions on yourself, then to support your clients as well.”



To learn more about Communicating Effectively, here are three articles by Master Coaches on [Active Listening](#) [Effective Questioning](#) [Direct Communication](#)

To learn more about powerful questioning, here are three resources by Master Coaches:

[Ten Questions That Work In Any Coaching Conversation](#)

[549 Coaching Questions](#)

[Coaching Questions](#)

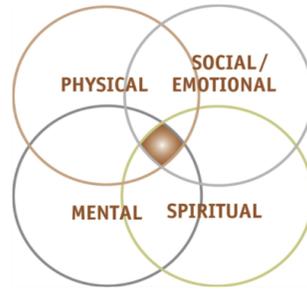


***You can have everything in life you want,
if you will just help enough other people get what they want.*** Zig Ziglar

Q&A: Step 6 Connect with Your New Clients

1. Recall a moment when you experienced a pure connection or synergy with someone. Recall another when you observed others synergizing, being totally in sync, with each other. What words describe how synergy or connection feels? What kind of outcomes can one expect from such moments?
2. Watch the Youtube clip of Al Pacino in *Scout of a Woman*. At what moment did he and the young woman finally synergize? How would you compare the development of their synergy to your developing a connection and synergy with a new client?
3. Make a list of what you need to get and do to set up your office-space to be client-ready. By what date can you be fully prepared for that moment when a prospect or new client calls?
4. Read ICF Competency 5: Active Listening. On a scale of 1-10 how able are you to listen with a quiet, non-judgmental mind when someone speaks to you? If not a 10, what have you learned from the articles by the ICF and Dr. Ferrari that could enhance your listening skills?
5. Read ICF Competency 6: Powerful Questioning. On a scale of 1-10, how willing are you to suspend your judgment or advice by asking open, thought provoking questions that allow your client to think for him/herself? From the articles by Irene Leonard and Keith Rosen, what have you learned to help your questioning be even more powerful and effective?
6. Read ICF Competency 7: Direct Communication. What are some ways you can be more direct and genuinely honest with your questions and observations, without fear of upsetting your client? What do you think of Master Coach Marion Franklin's approach?

Step 7: Set and Achieve SMART Goals



Let's look at how Covey's [Habit 7: Sharpen the Saw](#) applies to the setting, renewing and achieving goals for ourselves and helping our client with theirs. Sharpen the Saw means preserving and enhancing the greatest asset you have, yourself. We often become so busy, fixated or overwhelmed that we forget to pause and assess the state of our own well-being. We too often forget to replenish and improve our skills, knowledge, relationships, and increase our self-respect, self-compassion and capacity for enjoyment. When we overwork and wear ourselves down, we get dull, ineffective or suffer from stress and burn out.

For those of us in helping professions, we must 'sharpen the saw' daily by clearing negative energy we may pick up, staying well rested and nourished, prepared, emotionally agile, always at our best, by heeding Abe Lincoln's wisdom, "If I had six hours to chop down a tree, I'd spend the first four hours sharpening the axe."

This doesn't mean just taking a break (if you just set the saw aside, it remains dull) rather, per Covey, "It means exercising all four dimensions of our nature (body, mind, heart and soul) regularly and consistently in a wise and balanced way. To do this we have to be proactive." It may mean stepping out of the busyness to sleep or retreat in silence with nature, or we may have to get up and do something. Exercise, replace junk food with whole foods, smell a rose, organize your home, have loved ones for dinner, call a friend, resolve the slightest conflict, refrain from interfering in others' business, volunteer, show kindness, help others, ask for help, review and update your goals and calendar, learn to play the piano, tour cathedrals, take a class, get a coach, join that group, write a chapter, follow up with that possible client. Do whatever you need or like to do to renew and refresh yourself so that you can continue to create your best life and business!

To keep ourselves renewed and winning, we must clearly envision what we need and want, long term, short term, daily. From this vision, we can make strategic plans, from which we identify then prioritize our SMART Goals. For each goal, we commit to action steps; we manage our progress and hold ourselves accountable. We can also help our clients get renewed and winning, by helping them set and achieve their SMART goals.

Articulating clear goals and objectives

Successful business owners have clearly articulated goals to attain specific objectives. Many heart-centered coaches get frustrated by no or slow results of their marketing efforts; they may be unprepared or they focus only on their clients, then wonder why their business isn't growing. If they set no goals, or vague ones such as 'to get more business' they'll get no or vague results. Whether you're an empire of one or many, your success depends on your ability to set and achieve goals. Once we are confident in our own goal-setting, we can help our clients identify, articulate and achieve their most important goals.

SMART goals was conceived in 1981 by George Duran, a prominent consultant to large corporations, who wrote an article *There's a SMART Way to Write Management's Goals and Objectives* in which he introduced this concept to improve the chances of accomplishing a goal.

This effective tool provides the clarity, focus and motivation we need to set goals and improves our ability to reach them by defining our objectives and setting completion dates.

Here is an [article about SMART Goals](#)
and on page 65 is a SMART Goals worksheet for yourself and your clients.

SMART GOALS
SPECIFIC What specific, clear end result is intended? By whom, where, by when and why is this goal important? A vague goal: "I want to be wealthy". A specific goal: "By Jan 1, 2021, I celebrate being debt-free with \$100,000 in savings and a net-worth of \$1 million which allows me true financial freedom".
MEASUREABLE Like a scoreboard, with what numbers or data can you track progress and measure the actual outcome? How much, how well or how many? How will you know when this goal is accomplished?
ATTAINABLE Is it realistically possible to achieve this goal considering current realities or limitations? Do you have the necessary skills and resources? Make sure it is not out of reach or below standard or acceptable performance.
RELEVANT Is this goal worthwhile and consistent with your other short and long term goals? Does it align with your life purpose and with what the most important people in your life want in theirs?
TIMELY What is the time frame? Stating by when exactly (month/day/year or other specific condition/event) you want to accomplish this goal will set a sense of urgency and prompt better time management to your daily life.

This chapter covered the importance of continual personal enhancement by ‘sharpening our own saws’ and by setting and achieving our own personal and business goals. The more committed and adept we are with our own goals, the more confident and effective we can be in helping our clients set and achieve theirs.

As coaches, we get better results with our clients by helping them ‘sharpen their saws’ by being more aware of where they’re at, what they need and want and what they can do to achieve their most important goals. We continue to encourage them by following up to ensure they progress and succeed. See how this process is directly aligned with the ICF Competency: Facilitating Learning & Results which includes:

Facilitating Learning & Results

ICF Competency 8: *Creating Awareness*: Integrating and accurately evaluating multiple sources of information and making interpretations that help the client to gain awareness and thereby achieve agreed-upon results.

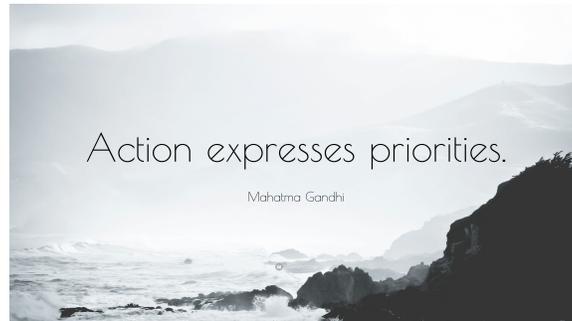
ICF Competency 9: *Designing Actions*: Creating with the client opportunities for ongoing learning during coaching and in work/life situations and for taking new actions that will most effectively lead to agreed-upon coaching results.

ICF Competency 10: *Planning & Goal Setting*: Developing and maintaining an effective coaching plan with the client.

ICF Competency 11: *Managing Progress & Accountability*: Holding attention on what is important for the client and leaving responsibility with the client to take action.

“Awareness without action is worthless.” Dr. Phil McGraw

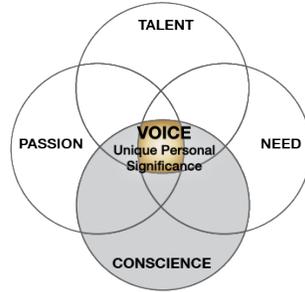
*“All your power is in your awareness of that power,
and through holding that power in your consciousness.” Rhonda Byrne*



Q&A: Step 7 Set and achieve SMART goals

1. What are your favorite ways of self-care to renew your body, mind, heart and soul?
2. Many helping professionals have the tendency to care so much about their clients that they exhaust themselves physically and emotionally. What clearing or self renewal activity can you do daily to prevent yourself from burn out or fatigue?
3. What are a few SMART goals you can set today to ensure business growth this month?
4. Read the ICF Competency 8: Creating Awareness. What are some tools and techniques that you can use to help your clients (and yourself) be more aware of where they're at, what they want, what barriers get in their way and what they can do to move forward?
5. Read the ICF Competency 9: Designing Actions. How could you help a client, who feels stuck or overwhelmed in life, to be willing to follow an action plan to stretch beyond their routines or comfort zones to achieve what they want?
6. Read competency 10: Planning & Goal Setting. Your client says her goal is to lose weight. How could your client benefit most by your guiding them with the SMART goals model?
7. Read competency 11: Managing Progress & Accountability. Your client has committed to her action plan to lose 2 pounds this week. How will you manage her progress and hold her accountable?

Step 8: Empower Yourself and Others



“When you engage in work that taps your talent and fuels your passion, that rises out of a great need in the world that you feel drawn by conscious to meet, therein lies your voice, your calling, your soul’s code.” *Stephen Covey*

From the beginning of this course, we’ve been following many experts’ advice that to succeed and prosper as entrepreneurs, we must know, apply and master business building skills and coaching competencies as coach-preneurs. And to keep us moving forward, we must master ourselves, our lives, thoughts, time, choices and priorities. In Step 1, we set a strong foundation with business and financial basics. In Steps 2 through 7, we clarified our vision, values and mission, defined our ideal clients and niche/specialty, learned ways to promote our services, how to invite prospects for sample sessions, how to convert prospects to paid clients and how to start coaching and keeping our clients winning. Having presented those steps to create and grow your business, in this Step 8, we’ll present ways to continue to empower yourself and those you influence, which is what we do as coaches, per this impressive Webster’s definition:

“Empower: to give (someone) the authority or power to do something; make (someone) stronger and more confident, especially in controlling their life and claiming their rights.”

Empower also means to inspire ourselves and others with the courage to break free from the chains of self-limiting beliefs or external conditioning that have kept us minimized or suppressed and unable to see our worth, potential or power. I like Clint Eastwood’s idea of self-empowerment: “Respect your efforts, respect yourself. Self-respect leads to self-discipline. When you have both firmly under your belt, that’s real power.”

We empower ourselves through self-respect, self-discipline and self-mastery, a subject thousands of years old, covered in religions, philosophy, literature and art-forms from all cultures. Our quest for freedom, self-determination, peace of mind and evolutionary growth is enhanced by positive mental attitude, seeking knowledge and truth, taking quiet reflection time, staying well rested and nourished, shedding self-limiting beliefs and by [knowing our rights](#) and exercising them ethically and appropriately. Self-mastery also includes being mindful of our habits and routines and being prudent with our relationships, resources and other assets, especially one when lost, we can never get back - our valuable, precious time.

The first seven steps of this course align with Covey’s *7 Habits of Highly Effective People*. This 8th step to create your business, Empower yourself and others, aligns with Covey’s next classic, *The 8th Habit: From Effectiveness to Greatness*, where we find his [8th Habit: Find your voice and inspire others to find theirs](#). He writes “Voice is one’s unique personal significance. Those who inspire others to find their voice are leaders the world needs now and in the future. Leadership is communicating to people their worth and potential so clearly, that they see it in themselves. The purpose of leadership effectiveness is to empower other people.” I bet you’d agree with me that coaches, who empower themselves and others to greatness, are leaders as well; as confirmed by John Quincy Adams who said:

“If your actions inspire others to dream more, learn more, do more and become more, then you are a leader.”

These words of wisdom confirm the importance of our vocation (Latin voca: calling or voice) through which we deliver our great contributions to mankind. As coaches, we draw out our clients' worth and potential, making them stronger, more confident, more in control of their lives with more freedom to think for themselves and to stand in their power with dignity and integrity. Which brings us back to Winston Churchill's wise advice, that we must be qualified and prepared for those special moments when we have the chance to do that special thing, unique to each of us and our talents, that work which can be our finest hours.

Optimizing your time wisely

Timeless wisdom also comes from Ben Franklin on his self-mastery techniques resulting in his unprecedented accomplishments despite extreme personal and political challenges and setbacks. Here are [Franklin's rules for living a virtuous life](#) and how he pursued his ultimate goal of moral perfection. Here is [Franklin's schedule to use his time wisely](#). He began each by setting his intention for the day, followed by a strict schedule, then ended his day asking himself "What good have I done this day?" Over 300 years ago, he accomplished so much with limited resources and support. He humbly attributes his broad influence, success and good fortune to his daily dedication to both his daily planner/journal and his treasured [mastermind group](#). How empowering it could be to apply any one of his principles or habits in our lives.

One tool for self-discipline and self-governance is a time-management system to list and prioritize our daily actions to ensure we reach our goals. Inspired by Franklin's genius and accomplishments, Covey created his leadership-based Franklin Planner (I'd be lost without mine) and system. In this fast paced world, it's common to get overwhelmed by overlapping commitments that all require our attention-now. How can we proactively manage our time, responsibilities, roles and activities, do excellent work and stay healthy with a positive mindset?



One way is using the Four Quadrant Time Management tool to monitor and manage our activities by urgency and importance and to track how we spend our time and resources: wisely or wastefully. We've provided a Four Quadrants worksheet (page 68), a weekly calendar (page 69) and 15 Minute Time Tracker (page 70) which you may find useful for your clients as well!

At the end of any day, rather than worry "Where did all the time go?" you can rest assured, knowing you put your first things first, improving your business and personal life. And because the greatest gift we can give another is our attention and time, you may find that you've made someone else's life a little happier, too.

		STEPHEN COVEY'S TIME MANAGEMENT MATRIX		
		URGENT	NOT URGENT	
IMPORTANT	Q1 NECESSITY	<ul style="list-style-type: none"> Emergency meetings Last minute deadlines Pressing problems Life changing communications Crises or unforeseen events 	Q2 EFFECTIVENESS	<ul style="list-style-type: none"> Proactive work Relationship building Important goals Creative thinking Planning and prevention Learning and renewal Quality time with family and friends
	NOT IMPORTANT	Q3 DISTRACTION	<ul style="list-style-type: none"> Needless interruptions Unnecessary reports Irrelevant meetings Diverting tasks, emails, phone calls, texts, status posts etc. Handling another's minor issues Saying yes too often 	Q4 WASTE

Efficiency is doing things right. Effectiveness is doing the right things. Peter Drucker

Managing self-doubts and fears

As we and our clients venture out of our comfort zones into new lands of our higher goals and aspirations, it's natural and expected that fears, doubts and resistance will arise. How do we manage the inner conflicts, silence the self limiting beliefs and transform those menacing thoughts into self-empowering and affirming thoughts and beliefs?

One way is to learn from our own thoughts. Buddha said "The mind is everything. What you think you become." If we have a negative thought, we can change our perspective and internal dialogue from "Why is this happening to me?" to "Why is this happening *for* me?"

Another way to deal with our inner conflicts is found in this in this story about a wise old Cherokee Chief teaching his grandson about the struggles that go on inside people, which he describes as a battle between two wolves. "One is evil: he is anger, envy, sorrow, regret, greed, arrogance, self-pity, guilt, resentment, inferiority, lies, superiority, and false pride and ego. The other wolf is good: he is joy, peace, love, hope, serenity, humility, kindness, benevolence, empathy, generosity, truth, compassion, and faith. The same fight goes on inside me and you and every other person, too." The grandson thought about it for a minute and then asked, "Which wolf will win?" His grandfather simply replied, "The one you feed."



And if ever you doubt yourself, remember this from Marianne Williamson:

"Our deepest fear is not that we are inadequate. Our deepest fear is that we are powerful beyond measure. It is our light, not our darkness that most frightens us. We ask ourselves Who am I, to be brilliant, gorgeous, talented, fabulous? Actually, who are you not to be? You are a child of God. Your playing small does not serve the world. There is nothing enlightened about shrinking so that other people won't feel insecure around you. We are all meant to shine, as children do. We were born to make manifest the glory of God that is within us. And as we let our own light shine, we unconsciously give other people permission to do the same. As we are liberated from our own fear, our presence automatically liberates others."



Q&A: Step 8 Empower Yourself and Others

1. How do you empower yourself?
2. What professional enhancement are you planning to empower yourself as a coach? (Ex: get your own mentor/coach, join a mastermind group, read coach-specific books, attend a workshop or conference, complete a course, earn a credential, etc.)
3. How could you apply Covey's 8th Habit: Find your voice, and inspire others to find theirs?
4. How could you adapt Ben Franklin's Virtues and his daily schedule to improve your life?
5. Print and start using the four quadrant time management grid (page 68) to monitor how you use your time for the next few days. What can you do more of and what can you do less of that will make for a happier, healthier and more successful week?
6. Print the 15 Minute Time Tracker (page 70) and schedule your ideal day. Include your morning routine, meals, exercise, meetings, errands, research/study, business/office time, family/friend time, phone calls, banking, TV, whatever you intend to do. Then, using that same schedule, note what activities you actually did that day. Did you get to do what you wanted to do? How might you prioritize and schedule your time to improve the quality of your personal life and business success?
7. How can we benefit from the old Chief's advice to his grandson to reduce and manage our self doubts and fears?
8. Read Marianne's quote on page 42. This is about your power, light and brilliance, and how and where you shine. How does her message relate to you personally and your mission as a coach to empower and liberate not only yourself in this lifetime, but also those you serve?

Conclusion and Commencement



This is your time to imagine and access all the opportunities out there for you now!

Now that you've concluded this course, we hope you feel inspired, empowered and prepared in your commencement towards expanding your ideal coaching practice which can contribute to you living your most fulfilling, rewarding and meaningful life

We also want you to know how much we appreciate you and everything you do to improve the conditions of your own and others lives, making this world an even better place for us all. Our wish for your success and happiness is best expressed by Ralph Waldo Emerson:

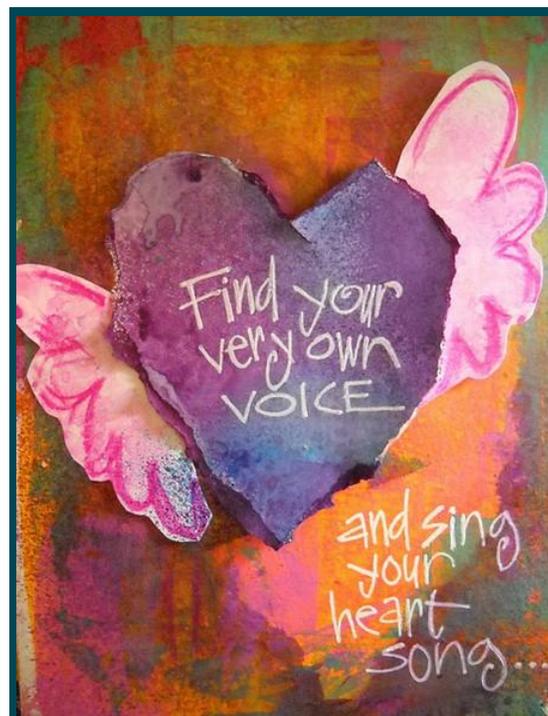
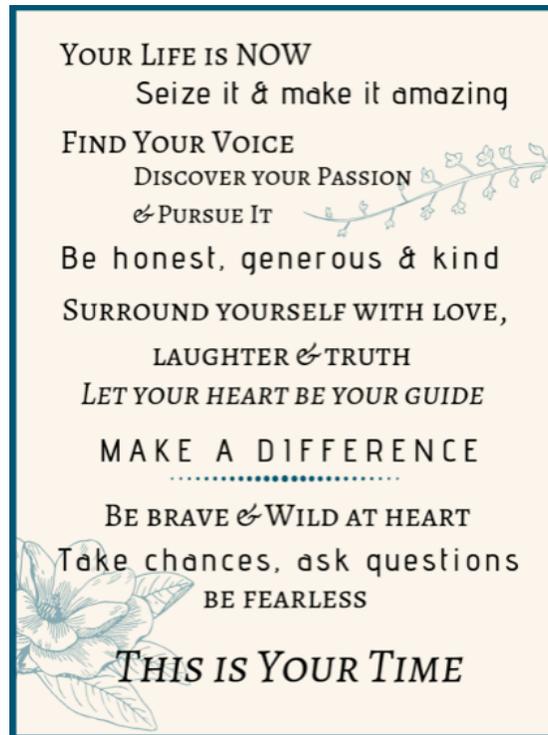
“To laugh often and much; to win the respect of intelligent people and the affection of children; to earn the appreciation of honest critics and endure the betrayal of false friends; to appreciate beauty and to find the beauty and best in others; to leave this world a bit better whether by a healthy child, a garden patch, or a redeemed social condition; and to know that even one life has breathed easier because you have lived...This is to have succeeded.”



Your satisfaction and success with this course is very important to us. We would love to hear from you with your impressions of the course. Feel free to reach out to us anytime with any questions or how we can help you further to build your ideal coaching practice. We would very much appreciate your answering the questions below and emailing them to us at kt@KristinTomczak.com

1. What about this course was most helpful for you to become more willing and able to build your business and create your ideal coaching practice?
2. What is different in your life or business now that you've completed this course?
3. On a scale of 1-10, how satisfied are you with what this course provided? Please tell us what would you change or add that would make this course a “10” for you?
4. Would you recommend that other coaches take this course, and why?
5. What would you like to achieve in this coming year, and what is your next step?

**We hope you've been inspired and empowered by what we've shared in this course
for you to create and expand your ideal, prosperous and joyful coaching business
and to enjoy a most fulfilled and meaningful life for yourself
and those fortunate ones who have you as their coach!**



Recommended Reading, Resources and more

For those who love reading really great books...

The 7 Habits of Highly Effective People by Dr. Stephen Covey
The 8th Habit: From Effectiveness to Greatness by Dr. Stephen Covey
The 10 Natural Laws of Successful Time and Life Management by Hyrum W. Smith
Autobiography of Benjamin Franklin
Born to Win by Zig Ziglar
Coaching for Performance by Sir John Whitmore
Coaching Questions: A Guide to Powerful Asking Skills by Tony Stoltzfus
Coaching Starter Kit Coachville
Co-Active Coaching by Henry and Karen Kimsey-House
Conversational Intelligence by Judith Glazer
Crucial Conversations by Patterson, Grenny, McMillan and Switzler
Daring Greatly by Brené Brown
E-Myth Revisited by Michael E. Gerber
Evolutionary Coaching by Dr. Richard Barrett
Failing Forward by John C. Maxwell
Focal Point by Brian Tracy
Four Steps to Building a Profitable Coaching Practice:
- A Complete Marketing Guide for Coaches by Deborah Brown-Volkman
Get Clients Today by Christian Mickelsen
Leading With Emotional Courage by Peter Bregman
Marketing Essentials for Coaches by Steve Mitten
Maximum Achievement by Brian Tracy
Nichecraft by Dr Lynda Falkenstien
Now Discover Your Strengths by Marcus Buckingham
Power Listening: Mastering the Most Critical Business Skill of All by Dr. Bernard Ferrari
Secrets of Closing the Sale by Zig Ziglar
Strengthsfinders 2.0 by Tom Rath and the Gallup Foundation
The Checklist Manifesto: How to Get Things Right by Dr. Atul Gawande
The Coaching Habit by Michael Bungay-Stanier
The Portable Coach by Thomas Leonard (founder of Coaching)
The Prosperous Coach by Rich Litvin and Steve Chandler
The Referral of a Lifetime by Tim Templeton
The Right Questions by Debbie Ford
The Success Principles by Jack Canfield
The Thin Book of Appreciative Inquiry by Sue Annis Hammond
Think and Grow Rich by Napoleon Hill
Transformational Coaching by Dr. Cherie Carter Scott
Triggers by Marshall Goldsmith
Well Being by Tom Rath and Jim Carter
What Color is Your Parachute 2019 by Richard Bolles (chapter on Finding Your Mission in Life)

And if you love really great movies...



If you love movies as much as we do, you may want to watch (again and again) the two best-ever (in my humble opinion) real-life examples of coaching at its finest. Despite, and perhaps because of, all the odds against both these coaches and who they were coaching, these true stories demonstrate that the most unlikely of us can in fact create historical and life-changing results for many more people than just who is being coached. Phones off. Butter the popcorn. Get the Kleenex.

The King's Speech is the true story of the current Queen of England's father, King George VI (played perfectly by Colin Firth) and his remarkable relationship/which became a friendship with the maverick Australian speech therapist Lionel Logue (played perfectly by Geoffrey Rush) who masterfully coached the King out of his self-doubt and misery in to his great personal achievement which inspired the world. King George (also known as "Bertie") unexpectedly becomes King when his brother Edward abdicated the throne. Lionel Logue, the most unlikely man to assist the King, does finally help and inspire the King to find his voice, to lead his nation into war and to lead the world out of war by his magnificent determination and triumphs over. If you want a real life example to watch, turn off every distraction get the popcorn and Kleenex, and watch Lionel Logue not only coach his client the King to victory but also as he prevails over the 'establishment' who disapproved of Lionel from the start. Greatest. Movie. Ever.

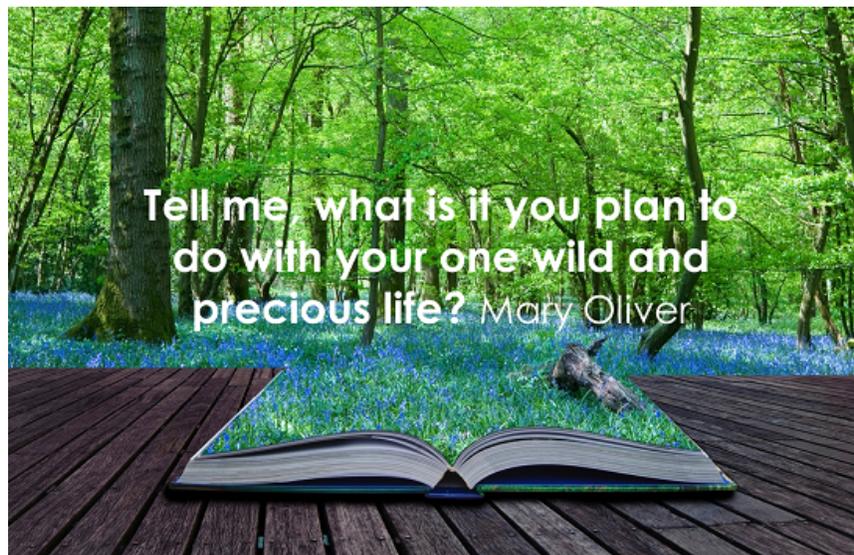
McFarland, USA is another true story. In 1987 a group of disillusioned Latino migrant teenagers were transformed from minimized field workers to national champions with the help of their coach who never gave up on their potential or making them see and believe they could win, despite all the personal and societal odds against each one of them. These teens and their Coach Jim White (played masterfully by Kevin Costner) were all doomed to failure; but together they faced and overcame their poverty and inner turmoils to achieve what was, for each of them, their pinnacle of success.

I AM is a remarkable documentary film which poses two questions: what's wrong with our world and what can we do to make it better? The filmmaker, Tom Shadyac, shares the story of his personal transformation after a disabling accident. He eventually recovered "emerged with a new sense of purpose, determined to share his own awakening to his prior life of excess and greed, and to investigate how he as an individual, and we as a race, could improve the way we live and walk in the world." This movie may provide some answers to our 'What can I do for whom' questions...

We can't help but admire how these professional and personal victories (for both coach and those being coached) totally relate to Winston Churchills 'finest hour' quote and Covey's 8 Habits and the ICF Competencies. Just watch how Lionel Logue with the King, and Coach Jim White with his team, had to prepare and become more qualified for what turned out to be their greatest and 'finest hours', and how they applied every one of the 8 Habits and every ICF Competency, without even being aware of them!

Speaking of inspirational movies about remarkable transformation, changing lives, under-dog to super-dog, setback to comeback, where someone helps another overcome adversity, more best-ever favorites shared by our coaches and students: *Remember the Titans*, *Miracle*, *Coach Carter*, *The Dead Poets Society*, *Shadows in the Sun*, *Stand and Deliver*, *Lean On Me*, *The Karate Kid*, *Seabiscuit*, *Rocky*, *Star Wars*, *Chariots of Fire*, *Cinderella Man*, *The Darkest Hour*, *Mr Holland's Opus*, *Lion*, *Erin Brokovitch*, *Hidden Figures*, *Good Will Hunting*, *Life Is Beautiful*, *The Pursuit of Happyness*, *It's a Wonderful Life*, *Amadeus*, *The Pianist*, *Sully* and *Invictus*, *Million Dollar Baby*, (I agree, anything Clint Eastwood)...

These and many more phenomenal movies inspire and demonstrate what we can accomplish together and what we can do with our hopes, dreams and precious life, so...



The following pages 49 - 70 include forms and documents to print out and use for yourself and with your clients.

7 HABITS OF HIGHLY EFFECTIVE PEOPLE

BE PROACTIVE

BEGIN WITH **THE END** IN MIND

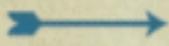
PUT **FIRST** THINGS **FIRST**

 **THINK WIN-WIN**

SEEK *to* **FIRST**  **THEN** *be* **TO UNDERSTAND UNDERSTOOD**

[SYNERGIZE]
COMBINE THE STRENGTHS OF YOUR TEAM

sharpen the saw

 (continue your education) 

Find your Voice

AND INSPIRE OTHERS TO FIND THEIRS



ICF Definition of Coaching:

Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

Find more about ICF Core Competencies at icf.to/CoreCompetencies

ICF Core Competencies

Setting the Foundation

- 1) Meeting Ethical Guidelines & Professional Standards**
Understanding coaching ethics and standards and applying them appropriately in all coaching situations.
- 2) Establishing the Coaching Agreement**
Understanding what is required in the specific coaching interaction and coming to agreement with the prospective and new client about the coaching process and relationship.

Co-Creating the Relationship

- 3) Establishing Trust & Intimacy with the Client**
Creating a safe, supportive environment that produces ongoing mutual respect and trust.
- 4) Coaching Presence**
Being fully conscious and creating spontaneous relationships with clients, employing a style that is open, flexible and confident.

Communicating Effectively

- 5) Active Listening**
Focusing completely on what the client is saying and is not saying, understanding the meaning of what is said in the context of the client's desires, and supporting client self-expression.
- 6) Powerful Questioning**
Asking questions that reveal the information needed for maximum benefit to the coaching relationship and the client.
- 7) Direct Communication**
Communicating effectively during coaching sessions, and using language that has the greatest positive impact on the client.

Facilitating Learning and Results

- 8) Creating Awareness**
Integrating and accurately evaluating multiple sources of information, and making interpretations that help the client to gain awareness and thereby achieve agreed-upon results.
- 9) Designing Actions**
Creating with the client opportunities for ongoing learning, during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results.
- 10) Planning & Goal Setting**
Developing and maintaining an effective coaching plan with the client.
- 11) Managing Progress & Accountability**
Holding attention on what is important for the client, and leaving responsibility with the client to take action.

Coaching Business Start-Up Checklist

- ___ **Do market research** to identify potential markets you'd excel in, to confirm demand for your business idea, services and products and to find where your passions overlap with what people need and want.
- ___ **Determine your valuable services or products** to offer and to whom and how.
- ___ **Do a SWOT Analysis** to know your business strengths, weaknesses, opportunities and threats.
- ___ **Know what it takes to own and grow business.** Determine how you, or with help from others, can be responsible for all the essential roles and functions.
- ___ **Create a short business plan** with your company info, mission, who you serve, your products/services and financial projections.
- ___ **Fund your business** to cover start-up and operational costs until it is viable and profitable. Know how your living expenses for the first year will be met. Determine all income streams, pricing strategies and expenses, set up realistic personal and business budgets and be prepared for start-up costs.
- ___ **Set up your office** with furniture, copier, file cabinet, office supplies, coaching forms/folders, etc, totally prepared to transact business and conduct uninterrupted confidential client calls.
- ___ **Set up your communication systems and equipment:** computer, landline, smartphone, fax, email, etc.
- ___ **Secure your IT** and perform regular back-ups to protect sensitive data on computers and devices from intrusions and disasters. IT problems can derail any business.
- ___ **Choose a business name.** Many professionals use their own name for their business and website domain. Search online or use state and federal corporate name search tools to see if the name you have in mind is unique and available, or use a "Doing Business As" until you choose a formal name.
- ___ **Get legal advice** (or free business counsel like SCORE, SBDC) for business structure, contracts, agreements and any legal or business related help you need.
- ___ **Have a financial advisor**, accountant or CPA to help you with all things financial, as needed.
- ___ **Consult a business insurance agent** to determine your needs.
- ___ **Have access to a Notary** and other business service providers you may need.
- ___ **Choose a business structure** as Sole Proprietor, LLC, S-Corp, etc. Consult with your legal advisor or CPA/accountant as your structure will decide your personal liability.
- ___ **Get your tax number or EIN** (Employer Identification Number) to separate yourself from your business and prevent your social security number from being exposed to identity theft. EINs are free; apply online.
- ___ **Obtain a business license if required.**
- ___ **Start generating your revenue stream ASAP**, resisting the temptation to 'wait until things are perfect'.
- ___ **Open your business bank accounts:** checking, savings/reserves, debit and/or credit card for business use only. Do not mix business and personal accounts.
- ___ **Set up a merchant account** like PayPal to receive income from all sources.
- ___ **Set up your accounting system and financial files.** Record income and expenses daily in Quickbooks or similar system. Keep all receipts in files aligned with tax prep categories. Few things will doom a business faster than messy or incomplete records, so always be 'audit-ready' for easier annual tax filing.

- ___ **Identify your ideal target audience and niche.** Knowing who your ideal clients are and what help or solutions you can offer them makes it easier to create effective promotional campaigns.
- ___ **Conduct target market research** and surveys to learn what your ideal clients need and want.
- ___ **Create a promotion/marketing plan** to promote and sell your services and products.
- ___ **Design your business identity/branding** to capture the attention of your ideal target market/audience. Your business name, website, logo, color themes, words used, promotions, customer service, your reputation, credibility etc. identify your services and products as distinct from similar providers.
- ___ **Register a domain name** consistent with your business name, to be regarded as a professional.
- ___ **Get your website up and running** ASAP for credibility. You can start simple and expand on it later.
- ___ **Set up social media profiles** (Facebook, LinkedIn, Twitter, etc) as needed, relevant or desired.
- ___ **Order business cards** for credibility and networking and start passing them out.
- ___ **Set up your Client Relationship Management system.** Create your own CRM or get recommendations from the ICF or other coaches.
- ___ **Prepare your sales pitch** to create an appealing first impression. Have a quick, clear way to introduce yourself and what you offer to potential customers, referral sources, prospective new hires, bankers and other key stakeholders who want to help or be helped by you.
- ___ **Promote your business.** Get the word out. Tell everyone you know (family, friends, etc) about your business. Join networking groups and a Chamber of Commerce. Tap into them for advice, referrals, introductions and to help with other items on this start-up checklist.
- ___ **Be prepared to offer a free sample-session and to convert prospects into paying clients.** Have a few ways to conduct free sessions to have a prospect experience the benefits of being coached by you.
- ___ **Be prepared to coach a client professionally.** Follow standard coaching session guidelines.
- ___ **Become confident in your coaching skills.** Continue to practice coaching with your paying and pro-bono clients to ensure you can achieve the specific results they desire.
- ___ **Invest in your professional development.** Have your own mentor/coach and continue learning to expand your knowledge and skills. Become an active member of a professional organization by attending conferences and events to stay motivated, inspired, connected and current.
- ___ **Prepare to be positioned as an expert.** Collect data, testimonials, case studies, session notes, others' wisdom, etc to eventually create valuable content to share by giving talks, writing articles, books/e-books and/or white papers to broaden your expertise, share your knowledge and expand your practice.

Business Plan Worksheet

Vision

Income Projections (Monthly, Quarterly, Annual)

Mission

Income Streams (Products, services etc)

Goals & Objectives

Cost Projections (Monthly, Quarterly, Annual)

Marketing Plan

Possible Future Expenses

Financial Plan

Action Plans

Professional Growth & Credentials

BECKY'S RIG

Resource · Inspire · Grow

Business Marketing Specialist

www.BeckysRIG.ca · 250 290 0081

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Business Plan

Vision



My home-based business is profitable, meaningful, rewarding and fun, providing online webinars, workshops and my expertise around the world. The continual stream of referrals from my happy clients generates more than enough income to provide me the lifestyle I desire.

Mission



To educate, inspire and provide the design and resources for small business owners to create memorable, dramatic and effective marketing campaigns to sell their valuable services and products, so they can successfully launch and grow their businesses.

Objectives



Land 10 new clients by December 31, 2019

Create a daily income of \$500

Conduct monthly workshops to educate and inspire others

Create an e-book about social media marketing, and generate \$30,000 profit in e-book sales by end of 2020.

Strategies



Use network/contacts to generate reviews & new clients

Advertise through social media for new work

Offer pro bono work to create awareness of the brand

Turn coaching and marketing processes into programs

Seek endorsements, approvals and testimonials

Action Plans



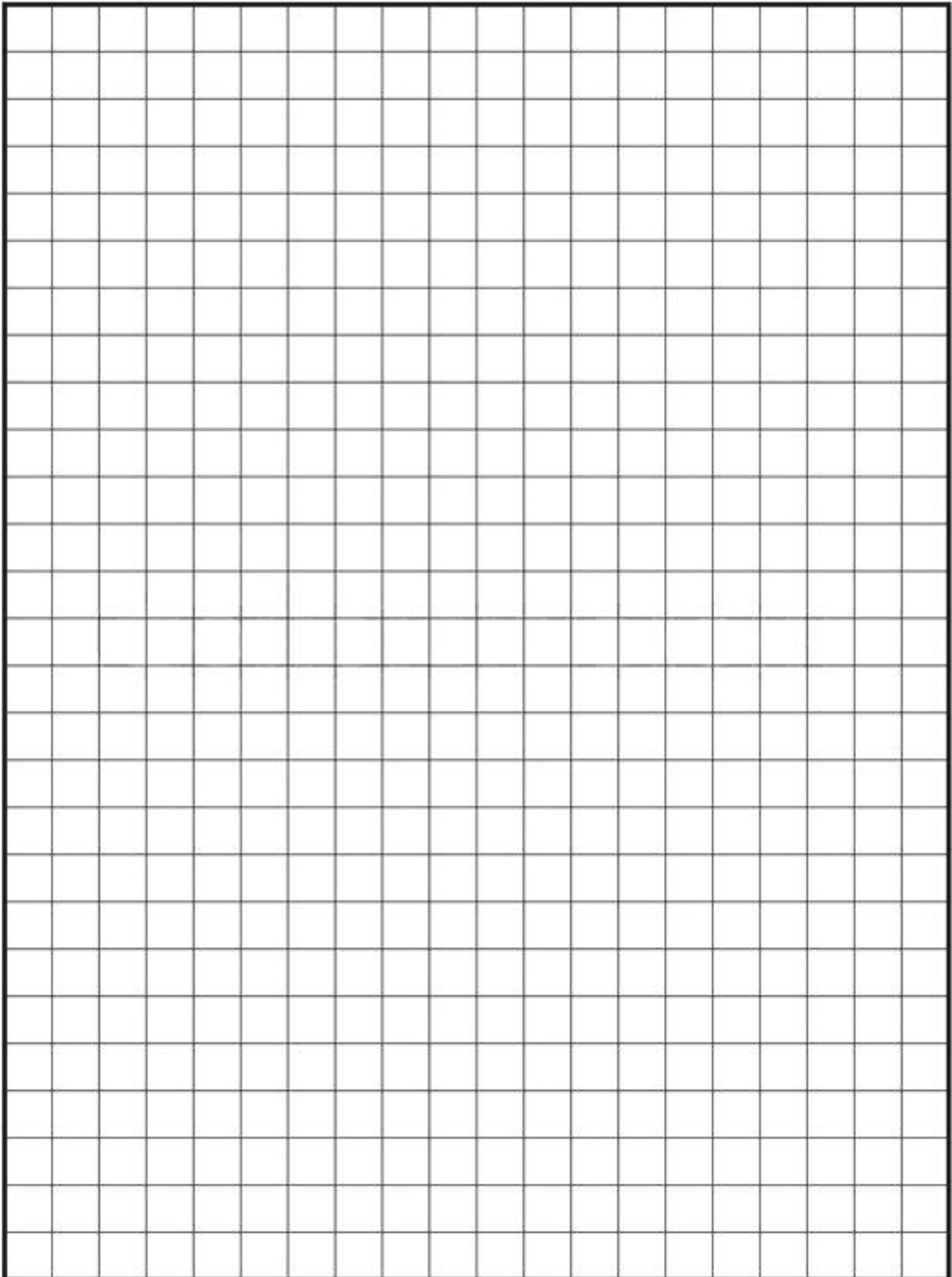
Develop an online marketing plan by Dec 2019

Develop a social media e-book by Dec 2019

Develop a weekly blog to create awareness and educate

Develop weekly programs for education for online presence, as well as areas of difficulty within coaching

Graph Paper for KPIs



**FREE SESSIONS THAT SELL:[™]
THE CLIENT SIGN UP SYSTEM**



Road Map

Directions: Use this as a guide when talking to potential clients. It is not a substitute for listening to the program, but it will help you learn the material faster, keep you on track, and get quicker results.

Goals & What They Mean/ What They Are Worth:

- 1) Tell me a little bit about yourself (or if you are a business coach, “tell me a little bit about your business”, or if you are a relationship coach, “tell me a little bit about your relationship”, etc.)
- 2) If you could wave a realistic magic wand, where would you like (your business, relationship, health, etc) to be in the next 6 months to a year?
- 3) If you had that in just the way that you’d like to have it, what would that do for you?
- 4) What would be the best part about it?
- 5) Why?

Challenges & Their Impact/Cost

- 6) What do you think could be slowing you down, standing in the way, or stopping you from having all of (list their goals from Question 2)?
- 7) What else do you think could be slowing you down, standing in the way, or stopping you? (Repeat until they don’t have anything else).
- 8) What impact do you think these challenges are having on your (business, relationship, etc.)?
- 9) What impact are these challenges having in other areas of your life?
- 10) How long have these challenges been going on?
- 11) What’s the worst part about these challenges?
- 12) Why?

The Turn-Around/Light at the End of the Tunnel

- 13) If you could turn all these challenges around and flow freely toward your goals, what would that do for you?
- 14) What would be the best part about that?
- 15) Why?
- 16) What have you found most valuable about our time together so far?
- 17) I have a program designed specifically to help people overcome these sorts of challenges and achieve these kinds of results. Would you like to hear a little bit about it?

How You Help Them

- 18) Explain how your coaching works (use the 5 part coaching methodology & relate it back to their goals & challenges)
- 19) Check in to see if they are with you –“Does this make sense?” “Would that be valuable to you?”
- 20) Explain your guarantee (30-day “Total Happiness” guarantee)
- 21) Explain your fees (\$XXX/month, \$YYY/Full Pay, etc.)
- 22) Which of these options feels like the best fit for you?
- 23) Would you like to give it a try?
- 24) Great. Let me get you entered into the system.
- 25) If someone isn’t ready to move forward now, help them overcome their fear and see if they are ready to move forward after that.



LIFE SATISFACTION ASSESSMENT FORM

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Purpose:

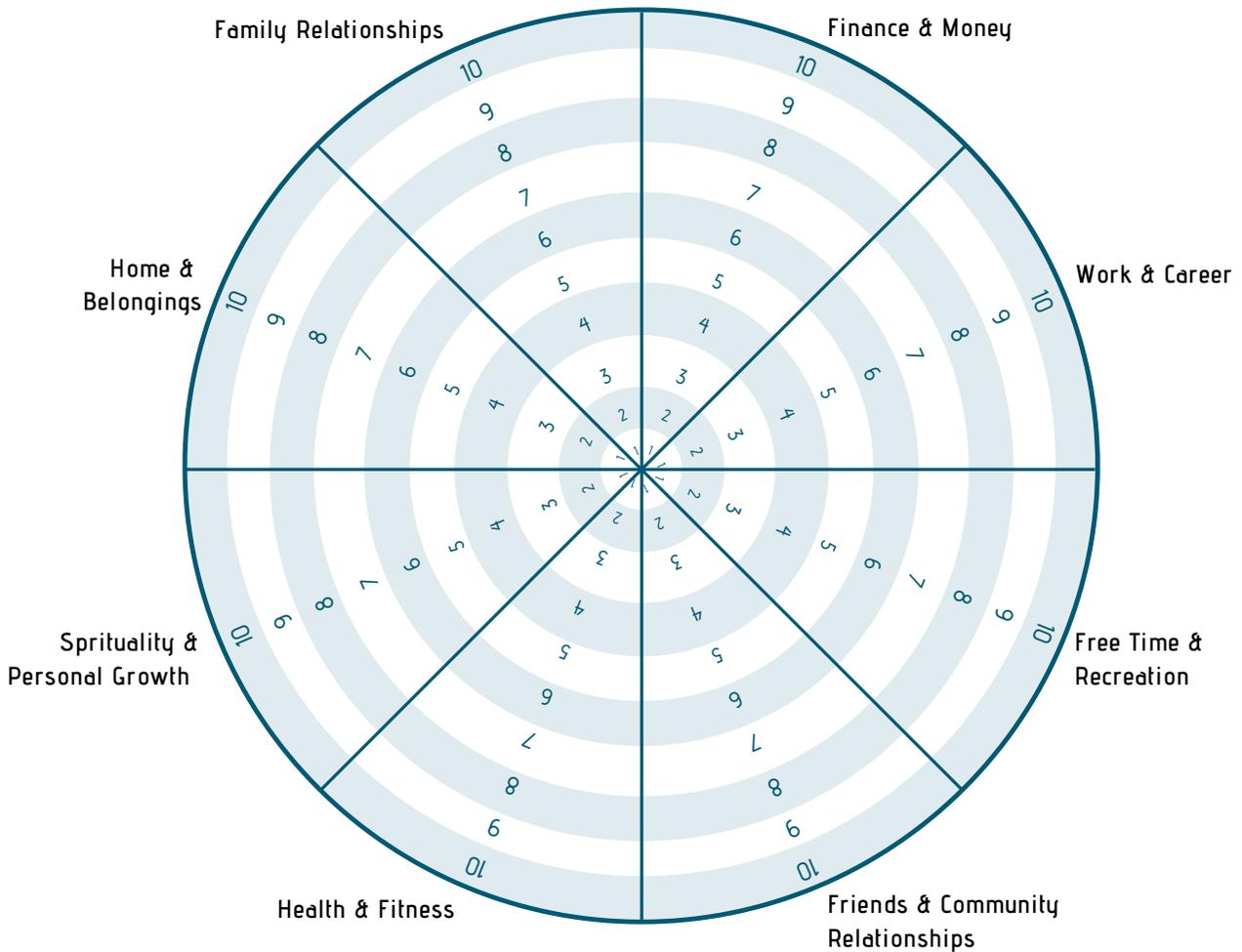
This assessment can help you determine how satisfied you are in each area of your life. It is a visual analysis of the areas in your life that are strong or weak, or that are full or lacking.

Instructions:

For each category, use the Assessment Key to determine your today's true level of satisfaction or happiness, rating each from 0-10. After shading in each section up to your rating, look at your resulting wheel to get a 'bird's eye' view of your life to see which areas are strong and which areas are lacking. Then go around the wheel again and ask yourself "What would this area look like at a 10?" Note some ideal scenarios and goals for each area to help you envision and create a happier & more meaningful life, ideally at all 10s!

Assessment Key

- 0 = 1 experience no satisfaction
- 1 = Next to no satisfaction
- 2 = Very much lacking
- 3 = Only a little bit
- 4 = Could use more but getting by
- 5 = Neutral, neither good nor bad
- 6 = Adequate enough
- 7 = I'm content with what I have
- 8 = I'm more than content
- 9 = Generous abundance
- 10 = Incredibly satisfied!



Clean Sweep Program

Welcome

The Clean Sweep Program is a personal diagnostic assessment and a tune-up for your life. The idea behind this popular program is that by strengthening the accompanying 100 items in your life, you will reduce stress, increase your energy and attract better people and opportunities into your life. Over 50,000 individuals have successfully worked with this program since 1992.

Instructions

Start by checking the box preceding any of the 100 statements which are true for you. Then, add up your 'score' in each of the 4 areas:

Physical Environment Well-Being
 Money Relationships

Most people initially score in the 30-60 range. Chart your initial score in the area below by coloring in the blocks, starting from the bottom up, in each column.

Then, over the next year, take the assessment several more times and update the chart below. It's very likely that your score will increase naturally. This is because you've begun to think more about these items, just by reading them once.

Support

If you wish to accelerate your process, why not work with a coach who has been trained in this program? Visit www.coachreferral.com to find a coach in your area. Both the Clean Sweep Program and CoachReferral.com are services of Coach University, the worldwide leader in coach training.

Also, check out www.clean-sweep.com for more copies of this self-assessment, along with other tools.

Coach University
 Your success partner.

Progress Chart

	Environ	Wellness	Money	Relation
25				
24				
23				
22				
21				
20				
19				
18				
17				
16				
15				
14				
13				
12				
11				
10				
9				
8				
7				
6				
5				
4				
3				
2				
1				

PHYSICAL ENVIRONMENT

- My personal files, papers and receipts are neatly filed.
- My car is in excellent condition.
- My home is neat and clean.
- My appliances, machinery and equipment work well.
- My clothes are all pressed, clean and flatter me.
- My plants and animals are healthy.
- My bed/bedroom lets me sleep extremely well.
- I live in a home/apartment that I love.
- I surround myself with beautiful things.
- I live in the geographic area of my choice.
- There is ample and healthy lighting around me.
- I consistently have enough time, space, freedom in my life.
- I am not damaged by my environment.
- I am not tolerating anything in my home/work environment.
- My work environment is productive and inspiring.
- I recycle.
- I use non ozone-depleting products.
- My hair is the way I want it.
- I surround myself with music I love.
- My bed is made daily.
- I don't injure myself, fall or bump into things.
- People feel comfortable in my home.
- I drink purified water.
- I have nothing unnecessary at home/in storage.
- I am consistently early or easily on time.

____ **Number of True (25 max)**

WELL-BEING

- I rarely use caffeine.
- I rarely eat sugar.
- I rarely watch television.
- I rarely drink alcohol.
- My teeth/gums are healthy. (Seen dentist in last 6 months)
- My cholesterol count is healthful.
- My blood pressure is healthful.
- I have had a complete physical exam in the past 3 years.
- I do not smoke tobacco or other substances.
- I do not use illegal drugs or misuse prescribed medications.
- I have had a complete eye exam within the past two years.
- My weight is within my ideal range.
- My nails are healthy and look good.
- I don't rush or use adrenaline to get the job done.
- I have a rewarding life beyond my work or profession.
- I have something to look forward to virtually every day.
- I have no habits which I find to be unacceptable.
- I am aware of the physical or emotional problems or conditions I have, and I am now fully taking care of all of them.
- I consistently take evenings, weekends and holidays.
- I have been tested for the AIDS antibody.
- I use well-made sunglasses.
- I do not suffer.
- I floss daily.
- I walk or exercise at least three times per week.
- I hear well.

____ **Number of True (25 max)**

MONEY

- I currently save at least 10% of my income.
- I pay my bills on time, virtually always.
- My income source/revenue base is stable and predictable.
- I know how much I must have to be financially independent.
- I have returned or made-good-on any money I borrowed.
- I have written agreements and am current with payments to individuals or companies to whom I owe money.
- I have 6 months' living expenses in a money market account.
- I live on a weekly budget that lets me to save and not suffer.
- All my tax returns have been filed and all taxes are paid.
- I currently live well, within my means.
- I have excellent medical insurance.
- My assets (car, home, possessions) are well-insured.
- I have a financial plan for the next year.
- I have no legal clouds hanging over me.
- My will is up-to-date and accurate.
- Any parking tickets, alimony or child support are paid.
- My investments do not keep me awake at night.
- I know how much I am worth.
- I am on a financially rewarding career/business track.
- My earnings are commensurate with the quality of work I do.
- I have no "loose ends" at work.
- I am getting all of the professional/career development I want.
- I rarely miss work due to illness.
- I am putting aside enough money to retire early.
- My earnings outpace inflation, consistently.

____ **Number of True (25 max)**

RELATIONSHIPS

- I have told my parents, in the last 3 months, I love them.
- I get along well with my sibling(s).
- I get along well with my co-workers/clients.
- I get along well with my manager/staff.
- There is no one who I would dread or feel uncomfortable "running across". (In the street, at an airport or party)
- I put people first and results second.
- I have let go of the relationships which drag me down.
- I have communicated or attempted to communicate with everyone who I have damaged, injured or seriously upset.
- I do not gossip or talk about others.
- I have a blank of friends/family who love and appreciate me for who I am, more than just what I do for them.
- I tell people how they can satisfy me.
- I am fully caught up with letters and calls.
- I always tell the truth, no matter what.
- I receive enough love from people around me to feel good.
- I have fully forgiven those people who have hurt/damaged me, intentional or not.
- I am a person of his/her word; people can count on me.
- I quickly correct and misunderstandings when they occur.
- I live life on my terms, not the rules/preferences of others.
- I am complete with past loves or spouses.
- I know my wants and needs and get them taken care of.
- I do not judge or criticize others.
- I do not "take personally" the things that people say to me.
- I have a best friend or soul-mate.
- I make requests rather than complain.
- I spend time with people who don't try to change me.

____ **Number of True (25 max)**

____ **Grand Total (100 max)**

Coach University

Your success partner

info@coachu.com

www.coachu.com

www.clean-sweep.com

1-800-48COACH

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Coach-Client Agreement Checklist

Coaching Contract Checklist (adapted by C. Munro from C. van Nieuwerburgh, 2014, pp.84-85)

Coaching Contract Checklist		
Topic	Specific Examples	Covered
Operational issues	<ul style="list-style-type: none"> • Length of cycle & number of coaching sessions • Length of time per session • Location of meetings • Date of meetings • Punctuality 	
Shared understanding of coaching	<ul style="list-style-type: none"> • What to expect from the interaction • Clarify the difference between coaching and mentoring or counselling • Clarify partnership nature of the relationship between coach and coachee 	
Agreement about withdrawal	<ul style="list-style-type: none"> • Agree how each party might be able to pull out of the coaching arrangement • Agree how reasons will be given 	
Ethical conduct	<ul style="list-style-type: none"> • Explain the code of conduct governing the work of the coach • Declare coaching credentials 	
Confidentiality	<ul style="list-style-type: none"> • Be specific about the rules of confidentiality • Explain when confidentiality may be broken (e.g. disclosure of risk of harm to coachee or others, or activity in breach of state licensing authority code of conduct for teachers) 	
Competence	<ul style="list-style-type: none"> • Be explicit about coach's level of experience • Be clear about coach's boundaries (in relation to counselling or other professional services) 	
Permissions	<ul style="list-style-type: none"> • Seek permission to take notes and explain what they are for and how they will be stored and disposed of • Seek permission to interrupt the coachee in order to "manage" the conversation • Seek permission to challenge and push thinking on the part of the coachee 	

Sample Coach-Client Agreement

Welcome to Coaching!

This Agreement dated _____ is between Coach _____ and Client _____.

We each have positive expectations for a coaching relationship to help you create the life and/or business that you want. Per the ICF, "Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential." We each agree to the following:

- Coaching addresses a client's interests in areas such as personal or career development, relationships, finances, spiritual growth, health, lifestyle, life balance, decision-making, and achieving short-term and/or long-term goals.
- Coaching is not therapy, counseling, advising or medical, financial, legal or other specialized counsel.
- Coaching may involve assessments, brainstorming, assignments, learning, goal-setting, action planning, strategy, accountability, commitments to action or behavior change, examining lifestyles based on a client's interests and agenda.
- Coaching is a confidential relationship; the coach agrees to not disclose any information without client's prior written consent, except in those situations where such confidentiality would violate the legal or ethical requirements.

Fees: Prepaid fees are: \$___ per hour or \$___ monthly, or \$___ for a ___ week package. Once a month has started, there is no refund. If Client prepays for blocks of time (example: 3 months/12 weeks) and decides to cancel, the balance of unused hours for the following months can be placed on account for future sessions or can be refunded. There is no commitment beyond month-to-month, but a two week notice is appreciated if Client decides to end our sessions.

Procedure: Coach will phone or Skype Client at our prearranged time. Our sessions are based on Client's priorities, needs and agenda, and average 45-60 minutes per session. Coach may request a progress report in-between sessions.

Changes: If one of us needs to reschedule our appointment, we will give a 24 hour notice, barring illness or emergency. If Client fails to show up for a scheduled call with no notice, Client may be charged for that missed session. Either Client or Coach can terminate this Agreement at any time with two weeks written notice. Client agrees to compensate Coach for all services rendered through the effective date of termination.

Problem Resolution: If one of us says or doesn't say, or does or doesn't do, something that upsets the other or that we don't understand or doesn't feel right, we will bring it to each other's attention immediately to resolve it. Communication via phone or email can be challenging since we cannot see body language or facial expressions; therefore we agree to promptly ask for clarification of any misunderstanding or the slightest discomfort. Both Client and Coach take full responsibility for our own decisions, actions and outcomes and commit to each other to resolve any problems or misunderstandings together.

Release of Information: The Coach engages in continuing education to enhance her professionalism and credentials. A credentialing body may require all Coach's clients' names, contact info, start and end dates for verification only. If needed, Coach would request Client's permission beforehand. Client can opt-out of this clause by initialing here _____.

Coach's Commitment is to serve as your coach and neutral partner to help you identify and achieve your personal and/or professional goals and to support your success. I cannot guarantee results, as your choices and actions determine your success; but I do commit to helping you in every way I can. As a member of the International Coach Federation, I am bound to the [ICF Code of Ethics](#) (client should read). I can be available for additional time, upon your written request, on an hourly fee basis, to provide additional client-related services such as consulting, reviewing documents, etc. outside of our coaching time. In between sessions I welcome your emails with ideas, problems, questions, etc, or to schedule a session. I will try to respond within 24 hours.

Client's Commitment is to be motivated and committed to taking action on my self-determined personal and professional goals. I realize that anything less than full honesty, participation and action may not lead to positive results or my success. I am under the care of a physician and healthy enough to engage in coaching. If any issues come up that should be handled by an expert, I commit to a timely resolution of such issues with the appropriate professional. I am solely responsible for creating my own well-being, decisions, actions and results from our coaching relationship.

Coach and Client signing below confirm that they have discussed and agree to the terms of this Agreement prior to their first scheduled session. Because the Client is the decision-maker in the coaching process, any and all actions or consequences resulting from the coaching sessions are the sole responsibility of the client, thus the Client hereby releases the coach of any and all liability pertaining to the services rendered in the coaching relationship.

Client Name _____ Signature _____ Date: _____

Coach Name _____ Signature _____ Date: _____

8 STEP LASER COACHING METHOD

.....

1. Welcome, discuss needs, then get permission to coach your client

Q: Would you like some coaching on this?

2. Help your client clearly define their desired outcome

Q: What is it that you truly want?

Q: How will you know you've achieved that result?

Q: What does success in this area look like to you?

3. Identify importance

Q: Why is achieving this important to you?

Q: What will be different?

4. Identify consequences if your client does not take action

Q: What can be the loss or cost or consequences if you don't achieve this goal?

5. Identify who or what could slow, block or stop your clients progress

Q: Who or what could get in the way of you achieving your goal?

Q: What justifications/excuses do you use to keep you from moving forward?

6. Make and commit to a simple but precise action plan

Q: What are a few things you will commit to doing today or this week to remove any barriers and to progress toward or achieve your goal?

7. Create accountability

Q: Who or what can you use to ensure you follow through on your commitment?

8. Schedule a follow-up session in which you'll acknowledge and validate your client for their progress. If willing, have your client choose another goal to work on.

SMART Goals

for this week/month/coming year

Financial:

Career or business:

Fun and leisure:

Social relationships:

Health and wellness:

Spirituality:

Personal development/education:

Home and possessions:

Love-life and family relationships:

SMART GOALS

SPECIFIC

What specific, clear end result is intended? By whom, where, by when and why is this goal important? A vague goal: "I want to be wealthy". A specific goal: "By Jan 1, 2021, I celebrate being debt-free with \$100,000 in savings and a net-worth of \$1 million which allows me true financial freedom".

MEASUREABLE

Like a scoreboard, with what numbers or data can you track progress and measure the actual outcome? How much, how well or how many? How will you know when this goal is accomplished?

ATTAINABLE

Is it realistically possible to achieve this goal considering current realities or limitations? Do you have the necessary skills and resources? Make sure it is not out of reach or below standard or acceptable performance.

RELEVANT

Is this goal worthwhile and consistent with your other short and long term goals? Does it align with your life purpose and with what the most important people in your life want in theirs?

TIMELY

What is the time frame? Stating by when exactly (month/day/year or other specific condition/event) you want to accomplish this goal will set a sense of urgency and prompt better time management to your daily life.

Time & Activity Management Worksheet

		URGENT	NOT URGENT	
IMPORTANT	Q1 Necessity		Q2 Effectiveness	
NOT IMPORTANT	Q3 Distraction		Q4 Waste	

Weekly Calendar

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
6AM							
7AM							
8AM							
9AM							
10AM							
11AM							
12PM							
1PM							
2PM							
3PM							
4PM							
5PM							
6PM							
7PM							
8PM							
9PM							
10PM							

15 Minute Time Tracker

Activity	
5:00AM	
:15	
:30	
:45	
6:00AM	
:15	
:30	
:45	
7:00AM	
:15	
:30	
:45	
8:00AM	
:15	
:30	
:45	
9:00AM	
:15	
:30	
:45	
10:00AM	
:15	
:30	
:45	
11:00AM	
:15	
:30	
:45	
12:00PM	
:15	
:30	
:45	

Activity	
1:00PM	
:15	
:30	
:45	
2:00PM	
:15	
:30	
:45	
3:00PM	
:15	
:30	
:45	
4:00PM	
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5:00PM	
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7:00PM	
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8:00PM	
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References and works cited in this course

Course Purpose and Preparation

The Purpose of a Business by Alan Weiss PhD www.alanweiss.com/the-purpose-of-a-business/
Five Reasons 8 of 10 Businesses Fail by Forbes Reports: www.forbes.com/sites/ericwagner/2013/09/12/five-reasons-8-out-of-10-businesses-fail/#6a83f1ca6978
Frequently Asked Questions by US SBA: www.sba.gov/sites/default/files/advocacy/SB-FAQ-2016_WEB.pdf
When You Should Embrace Your Pangs Of Doubt by Steven Cox: www.fastcompany.com/3029012/when-you-should-actually-embrace-your-pangs-of-doubt
The following resources* are referenced throughout this course
*Marketing Essentials for Coaches by Steve Mitten, MCC: www.acoach4u.com/articles/book_index.htm
*The Prosperous Coach by Rich Litvin and Steve Chandler: www.richlitvin.com
*The 7 Habits of Highly Effective People by Dr. Stephen Covey
*The 8th Habit: From Effectiveness to Greatness by Dr. Stephen Covey
*ICF Core Coaching Competencies by The International Coach Federation: www.coachfederation.org

Your Strengths and Opportunities

Every Coach Should Use This Easy Tool by E. Elsey: www.coachfederation.org/blog/every-coach-should-use-this-easy-tool-to-boost-their-business-swot-analysis
Do You Know What You Are Especially Good At? by Michael Hyatt: www.michaelhyatt.com/do-you-know-what-you-are-especially-good-at/
CliftonStrengths Assessment by Gallup: www.gallup.com/cliftonstrengths/en/253676/how-cliftonstrengths-works.aspx
Strengthsfinder 2.0 by Tom Rath and Gallup Press
How To Respond to a New Opportunity by Minda Zetlin: www.inc.com/minda-zetlin/how-should-you-respond-to-a-new-opportunity-8-ways-to-decide.html

Step 1: Build a Strong Foundation for Success

Entrepreneur definition by WebFinance Inc: www.businessdictionary.com/definition/entrepreneur.html
Why Small Businesses Fail (or Fail to Thrive and Grow) by Karyn Greenstreet: www.passionforbusiness.com/articles/why-businesses-fail.htm
Habit 1: Be Proactive by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-1.html
Call Me TrimTab: Buckminster Fuller by Burklyn Earth: www.youtube.com/watch?v=GjLFWHcLfkG
Man's Search for Meaning by Viktor Frankl
What is Your Entrepreneur IQ? by Barbara Corcoran: www.barbaracorcoran.com/ent-iq
As the leader of your own life quote by Brian Tracy: www.briantracy.com
The E-Myth Revisited by Michale E. Gerber
ICF Core Competencies and Code of Ethics by the ICF Global Board of Directors: www.coachfederation.org
ICF Sample Coaching Agreement by the ICF Global Board of Directors <https://coachfederation.org/app/uploads/2017/11/SampleCoachingAgreement.pdf>
Coaching Agreement example by Coach Michele Caron: www.mylifecoach.com/agreement.htm

Step 1a: Create Your Business Plan

Business Plans Made Simple by Leslie Truex: www.thebalancesmb.com/business-plans-made-simple-1794150
What Should Be In Your Annual Business Plan by Karyn Greenstreet: www.passionforbusiness.com/blog/what-should-be-in-your-business-plan/

Step 1b: Create Your Financial Plan

Cost of Doing Business Calculator by NPPA: www.nppa.org/calculator
Sample Business Budget Template by Rosemary Peavler: www.thebalancesmb.com/sample-business-budget-template-393033

Step 2: Clarify Your Vision, Values and Mission

Habit 2: Begin With the End in Mind by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-2.html
List of Values by Steve Pavlina: www.stevpavlina.com/blog/2004/11/list-of-values/
What Color is Your Parachute: 2019 by Richard Bolles
I AM Documentary/film by Tom Shadyac: www.iamthedoc.com/thefilm/
The 8th Habit Summary by John Bippus: www.johnbippus.com/information/the-8th-habit
How to Know Your Life Purpose in 5 minutes by Adam Leipzig: www.youtube.com/watch?v=vVsXO9brK7M
How Great Leaders Inspire Action by Simon Sinek: www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?language=en
30 Example Vision Statements by Top Nonprofits: www.topnonprofits.com/examples/vision-statements/
50 Example Mission Statements by Top Nonprofits: www.topnonprofits.com/examples/nonprofit-mission-statements/
Create Your Life Coaching Vision and Mission Statement www.beautifulyoucoachingacademy.com/create-your-own-life-coaching-vision-and-mission-statement/
Mission, Vision and Values of Gratefulness.org www.gratefulness.org/about/values-mission-vision/

Step 3: Identify Your Target Audience and Niche

Habit 3: Put First Things First by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-3.html
Everyone is not our customer by Seth Godin: www.seths.blog
Customers buy for their reasons, not ours Quote by guerilla marketing expert Orvel Wilson
Choose Your Coaching Target Market by M. Schubnel: www.coachandgrowrich.com/coaching-blog/choosing-your-coaching-target-market-and-coaching-niche/
Four Steps to Building a Profitable Coaching Practice by Deborah Brown-Volkman
Nichecraft by Dr. Lynda Falkenstein
Claim Your Niche Self-Test by Dr. Lynda Falkenstein: www.falkenstein.com/selftest/nichetest.html
Find Your Niche in 60 Minutes or Less With These 4 Questions by Jeff Boss: www.entrepreneur.com/article/250494
The Most Critical Part of Your Coaching Niche by Rhonda Hess: www.prosperouscoachblog.com/target-market-can-do-coaching-niche-not/
Coaching Statistics by Amy Watson and Jackie Rieves: www.marsvenuscoaching.com/coaching-statistics/
7 Steps to Defining Your Niche Market by The Staff of Entrepreneurs Media, Inc: www.entrepreneur.com/article/240163
50 Niches in Professional Coaching by Berry Fowler: docs.wixstatic.com/ugd/ebc7e3_cb13c4c0c57e495fba25a031eb65b75.pdf
Preparing Your Elevator Speech by Dale Kurow: www.dalekurow.com/preparing-your-elevator-speech

Step 4: Promote Your Services and Offers

People don't want to buy... quote by Theodore Leavitt, Harvard Business School Professor

Habit 4: Think Win-Win by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-4.html

151 Ways to Attract All the Clients You Need by Fabienne Fredrickson: www.kristintomczak.com/wp-content/uploads/2017/08/151-Ways-to-Attract-Clients.pdf

Red Hot Free Session Offers by Christian Mickelsen: <https://s3.amazonaws.com/03digital-media/pdfs/g2-red-hot-free-session-offers.pdf>

Step 5: Convert Your Prospects to Paying Clients

Habit 5: Seek First to Understand, Then to Be Understood by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-5.html

Assessments from CoachYou.com and Coachville.com

Get Clients Today book and Free Sessions That Sell script by Chris Mickelsen

Coaching Questions: A Coach's Guide to Powerful Asking Skills by Tony Stoltzfus

Your New Client Welcome Package by Fabienne Fredrickson: www.clientattraction.com/2012/04/6-key-elements-to-include-in-your-new-client-welcome-package.php

Law of Detachment by Dr. Andreas Boettcher: www.drandreas.com/podcast/law-detachment-learn-let-go-watch-sales-soar/

The Zen of Getting Your First Coaching Client by Amanda Alexander: www.coachfederation.org/blog/the-zen-of-getting-your-first-coaching-client

Step 6: Begin Coaching Your New Clients

Habit 6: Synergize by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-6.html

Daring Greatly by Brené Brown

Al Pacino Tango Scene from The Scent of A Woman by SceneScreen: www.youtube.com/watch?v=HdJ5cp8mYkE

Time Management Tools by FranklinPlanner.com

Coaching Forms by Michele Caron: www.mylifecoach.com/free_coaching_forms.htm

Active Listening: The Key to Hearing it All by International Coach Academy: www.coachcampus.com/articles/active-listening-key-to-hearing-all/

The Art of Effective Questioning by Irene Leonard: www.coachingforchange.com/pub10.html

Direct Communication by Marion Franklin: www.certifiedcoachblog.typepad.com/blog/2011/03/direct-communication.htm

Power Listening: Mastering the Most Critical Business Skill of All by Dr. Bernard Ferrari

You Need to Listen to Lead by Dr. Ferrari: <https://hub.jhu.edu/gazette/2013/march/this-month-books-bernard-ferrari/>

Seven Powerful Coaching Questions by Rhonda Hess: www.prosperouscoachblog.com/powerful-coaching-questions/

10 Coaching Questions That Work In Any Conversation by Keith Rosen: www.keithrosen.com/2011/11/10-coaching-questions-that-work-in-any-conversation/

549 Powerful Coaching Questions by E. Elsey: www.kristintomczak.com/wp-content/uploads/2018/04/549-Powerful-Coaching-Questions-FREE_u.pdf

Coaching Questions: A Coach's Guide by Tony Stoltzfus: www.coach22.com/coaching-questions-guide-to-powerful-asking-skills.html

Step 7: Set and Achieve SMART Goals

Habit 7: Sharpen the Saw by Dr. Stephen Covey: www.franklincovey.com/the-7-habits/habit-7.html

There's a SMART Way to Write Management's Goals and Objectives by George T. Doran

SMART Goals, How to Make Your Goals Achievable by the MindTools Team <https://www.mindtools.com/pages/article/smart-goals.htm>

Step 8: Empower Yourself and Others

Habit 8: Find Your Voice and Inspire Others to Find Theirs by Dr. Stephen Covey: www.chichonip.files.wordpress.com/2012/07/the_8th_habit-online.pdf

Universal Declaration of Human Rights by the United Nations: www.un.org/en/universal-declaration-human-rights/index.html

Benjamin Franklin 1706-1790 by Flamebright.com: www.flamebright.com/PTPages/Benjamin.asp

Adapting Franklin's Daily Schedule to Your Life by Mike Yarbrough: www.wolfandiron.com/blogs/feedthewolf/adapting-ben-franklin-s-daily-schedule-to-your-life

Franklin's Mastermind Club by the National Humanities Center: www.nationalhumanitiescenter.org/pds/becomingamer/ideas/text4/juntollibrary.pdf

Four Quadrant Time Management Matrix by Dr. Stephen Covey

Beyond the Conflict of Inner Forces a Cherokee Story: www.awakin.org/read/view.php?tid=927

A Return to Love by Marianne Williamson



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What our coaches say about this course...



“Because of this course, I know my niche, am making more money, my office is set up so I can more easily handle my increased workload. I just signed up my 6th client, the goal I set for our 12 weeks together. My knowledge, competence and confidence increased. All new coaches should take this course.” NB

“This course helped me have a growing coaching business with ideal paying clients. The information, tools and resources for setting up a coaching business were exactly what I needed. I highly recommend this training to all new coaches. It’s the perfect next step for your coaching ability and business growth.” FJ

“I was at a standstill with my coaching practice. I needed help to move forward. The information, insight and resources are priceless. I wouldn’t know where to begin to find all of those. I have my website, business cards, much more confidence in my knowledge and abilities as a coach, but most important – I learned a great deal about myself and now I know I really am a good coach! Thank You!” SK

“I took this course for more understanding, clarity, direction and confidence in who I am and what to say to people about being a life coach, all which I gained. My self-doubt is gone. I have order in my business and personal life. I’ve set up my office to be ready for new clients. I now know how to do a sample session to enroll a client. I have a strong foundation and found my own voice and know what I have to offer the world! I got my cards, website up and my first paying clients. Every new coach should take this course for the opportunity to grow and move forward being successful in everything you do. My biggest take-away is realizing we no longer have to be limited by our past. Every moment we have the freedom to choose our responses. This inspired me to face the biggest barrier in my entire life.. a true break-through which has changed my whole perspective of life.” GD

“I took this 8 Step course because I wasn’t comfortable or confident to take off running on my own as a coach. I’ve always believed in continuing education and this was my chance. Now I understand and am so ready to take on the role of leadership as a Coach. My confidence has taken giant steps. I’ve gained listening powers not only in coaching but in my everyday life, really hearing and understanding people better. I’m not so quick to interject my own opinions. What I enjoyed most about this course was how to cause a win-win for everyone, me included. I would absolutely recommend this course to new coaches who want more confidence in talking to people and to figure out their niche or how it’s ok to proceed without one, taking the pressure off!” LL

“I’ve made great progress this week due to the information and resources you shared, like: Website up. I have my first paying client. I’ve gained unbelievable progress in time management and organization, relieving all the stress and chaos. I’m finally in control with a clear vision and goals, a real business plan and am actually checking off the steps of the coaching business start-up checklist!” ST