



Coach's CEO Toolkit

Business Operating Model

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How do I run my business
with ease?

Curated guide to establishing
your business across Legal,
Financial, Clients, & Marketing

Business Operating Model

Legal Registrations & Reporting

It may not be glamorous, but it is required and protects you personally. Start here and maintenance will be minimal.

1. Legal – You set up your business officially in the 4 hour business plan. Here we are going to make sure that your key reference information is noted and archived for easy reference going forward, and make you aware of the ongoing activities here that come up as a business owner.

Reminder from the 4 Hour Business Plan before you proceed:

- **Create Legal Entity** – Create an LLC, or your preferred legal entity to limit your personal liability should your business encounter an issue. Note your official legal entity name and the location of that Certificate of Formation here:

- **Business Registration** – Register with your state and federal for your Tax ID / EIN and note it below. Store the copy of your business registration for safekeeping with the location noted here

- **Business Insurance** – Buy and maintain insurance for your business (I use Alternative Balance for Life Coaching). Note your policy number and store your insurance policy agreement with the location noted:

Ongoing maintenance:

- **Maintain Registrations** – Each year you may be asked to file an Annual Report with your state if you are based in the US. There is a nominal cost to this and you will receive official notification to do so in the mail. Respond to this timely and keep a copy for your records, with the date and location noted here:

- **Maintain Insurance** – I buy my insurance for a one-year period and am sure to renew each year for coverage. This isn't a place to let coverage lapse, as soon as you receive a reminder to re-enroll take care of it. Note insurance policy number, contact information for insurer, term and renewal date here:

Business Operating Model

Manage Money to Scale

How you set up your accounts for receiving and making payments will make tracking and transfers efficient.

2. Financials – Separate your business from personal across your financials. Stay with me if the numbers tend to send you running for the exits. We are keeping this simple and easy on you!

Reminder from the 4 Hour Business Plan before you proceed:

- **Bank Account** – Open a bank account for client payments to be received in and business expenses to be paid from (I use Bank of America). We will set up your payment apps to automatically transfer payments received to this account (more on this later). Bank account number _____.
- **Accounting Tracking** – Track every bit of income received from your business and every expense you have for your business from the beginning. You will need this when calculating what taxes you need to pay the government at the end of the year. This also allows you to view your business profit on a regular basis. Schedule time in your calendar to keep up with this monthly (for example on the third business day of the month you complete it for the prior month), so that annual reporting for taxes is a breeze.

Ongoing operations:

- **Tip** – Open the business bank account at the same bank as your personal account for easy electronic transfers of funds between them, for example paying yourself income.
- **Credit Card** – Repurpose or open a credit card associated with your business from which to pay business expenses (I use American Express). Aim to pay all your business expenses (and only your business expenses) with this card for easy tracking. Credit card number _____.
- **Payments** – Pay the business credit card bill from your business bank account electronically, ideally with auto-payment set up and wherever possible paying the card off in full to avoid paying interest.
- **Tip** – If all income received is sent to your business account and all expenses are paid with your credit card, tracking will be easy. Be sure to record cash payments that aren't captured above.

Business Operating Model

Manage Clients Effectively

Scheduling, tracking offers, contracting and billing covers the administrative side of your interaction with clients.

3. Administrative Assistance (Scheduling) – Eliminate time spent on scheduling meets, consults, coaching sessions, reminding clients of their appointments, and accommodating reschedule requests.

- **Tip** – If a virtual assistant sounds like a dream to you, do yourself a favor and start with a small investment in a proper scheduling software.
- **Scheduling** – Set up automated scheduling of consults and coaching sessions, with automated reminders to clients and you. (I use Calendly)
- **History** – This also serves as a record of meetings that you have had.
- **Tracking** – Many coaches note it is difficult to keep track of how many sessions in a package have been used. I solve for this by putting the number of the session in the title of the event whenever I book for clients, for example at our regularly agreed upon time.
- **Reminders** – I have had many clients remark that the official reminders not personally sent from me keep them motivated to honor the appointment and not cancel simply because they don't "feel up to it".
- **Tip** – Schedule your other business tasks in the same calendar that your automated scheduler syncs to. Never skip your business building activities again or miss important personal development sessions.

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4. Sales (Offer Tracking) - Follow these steps for each unique offer you make. Our 1:1 prices and terms can change over time. We may offer programs or group coaching too. Track it here for each offer that you make.

- **Time** - Specify time period / duration of service and at what frequency (e.g. weekly 1:1) and format (e.g. Zoom).
- **Payment** - Payment price paid in what frequency (e.g. monthly) and format (e.g. PayPal)
- **Inclusions** - Services provided for each offer, including any add-ons.
- **Payment Method** - Establish payment method for client to pay you (e.g. PayPal, Venmo, Stripe).
- **Lead Page** - Create a sales lead page for the client to learn about your offer and enroll. You may choose to make this a private link for your 1:1 coaching to be shared only after the consult, whereas a public link might be best for any programs or group coaching.
- **Delivery** - Set up client delivery mechanism for any materials / videos to be shared. (private web page, YouTube unlisted link, Google drive)
- **Clients Enrolled** - For each offer you make, track who enrolled in that offer.

Offer	Time	Payment	Inclusions	Payment Method	Lead Page	Delivery	Clients Enrolled
1	6 month package weekly	\$6k	Weekly 1:1, Voxer, Online Programs	Stripe	Weblink A	Live	Client 1, 2, 3
2	Online Program	\$997	Videos, online community	GoDaddy Pay Link	Weblink B	Weblink D	Client 4, 5
3	Challenge	\$497	Videos, PDFs, one 1:1	GoDaddy Pay Link	Weblink C	Email	Client 6

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5. Contracting & Billing (Client Onboarding) - Establish a process for taking on clients. The easier you can make this on you and the client, the better off everyone will be.

Reminder from the 4 Hour Business Plan before you proceed:

- **Contract** - Create a contract for engaging with clients. (I use the CCA template with additions that I have made over time which further clarify expectations upfront)

Ongoing maintenance:

- **Signature** - Establish a method for clients to electronically sign the contract. (I use Jotform)
- **Payment** - Establish a method for clients to pay electronically. (I use Jotform for recurring subscription payments through Stripe; I use GoDaddy Online Pay Links for clients to enroll in my one-time programs)
- **Tip** - Consider a client intake form to gather basic information about your client such as their mailing address for any gifts you may want to send. It's also a helpful baseline which they can revisit at the end of the engagement to recognize (and celebrate!) their growth.

Business Operating Model

Protect Your Marketing Audience

Setting up the basis for your web, email, and social media marketing ensures you remain in control of reaching your audience.

6. Digital Marketing (Web) - Publicize your business with a website so that it is searchable and can be referenced anywhere that you market your business. This lends an air of credibility and peace of mind for prospective clients who will want assurance of your standing before signing with you.

Reminder from the 4 Hour Business Plan before you proceed:

- **Domain** - Buy a domain that is easy to recognize, spell, and remember. Many people use their actual name or a name of their business. Take care not to make it too long or difficult to spell. (I use GoDaddy Domains)

Ongoing maintenance:

- **Email** - Establish a new email address @ your new domain. This once again shows credibility and makes things less confusing for your clients. Hello or your first name @domain is best. (I use GoDaddy Office365)
- **Webhost** - To create a web presence, you will need to choose a web host provider who will provide software on which you can build your site (or use an easy, basic template to get started). This is the one central spot where you will direct people to learn more, buy, subscribe to emails, and to schedule consults with you without having to juggle many different links that you may have. This is useful for social media platforms who will generally only allow you to list a single link. (I use GoDaddy WebHosting)

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- 7. Email Marketing** - Establish your audience and a way to reach them outside of social media in case of platform or account closure. This eliminates your dependency on social media and ensures that you can communicate with your audience without being beholden to the changing algorithm of social media and who they will present your content to in a newsfeed.
- **Bulk Email Delivery** - Choose an email marketing provider to send bulk emails to many people at once without being marked as spam and filtered out of their mailboxes. (I use MailChimp)
 - **Audience Management** - Create an email marketing list based on who you know to start, growing it as you make new contacts. Remember to export your contacts from this software once a quarter and save it in your cloud drive just in case something goes wrong. (I use MailChimp Audience)
 - **Tip** - Many people report preferring that they receive offers and promotions in email rather than social media (the latter they go to for entertainment and socializing). For that reason alone, make sure your offers are received in the medium that people prefer.
 - **Tip** - While following up individually can be helpful in any case, having people who have expressed interest in working with you receive regular emailed content that is helpful to them is another easy way to keep serving them with the gentle reminder that you are here to help if they seek additional support.

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8. Social Media Marketing - The best free way to get the word out about you and your business.

- **Marketing** - Use social media posts to serve others and spread the word about your service so people know, like, and trust you. (Facebook, Instagram, TikTok, LinkedIn, YouTube)
- **Business** - Reminder to set up business accounts for when you make offers for a fee, which is not permitted on your personal accounts.
- **Visibility** - Algorithms change all the time, that is, the rhyme or reason behind what content the social media platform decides to put in front of tens, hundreds, or thousands of people. That being said, I will share what has worked (and not worked) for me.
- **Reels** - 90 second or less videos are beloved by the platforms right now. So use them.
- **Multimedia** - My audience is a mix of video watchers, video readers, and text lovers. Hit them all by adding captions to your videos and including a transcript to text writeup in the very same post. Think of moms with a napping baby that can't turn on the audio and want to skim your post instead of watching / reading the video captions.
- **Myth 1** - One myth to let go of here is that views mean everything. I have had tens of thousands of views on posts, with little take up on free consults or even free gifts. You aren't trying to reach the world with your posts, just "your people" who will best receive coaching from you (because of your message, how you share it, your experience, etc.).
- **Myth 2** - The second myth to let go of is that views or engagement is accurate. I remember having super low views and engagement initially and wondering whether anyone was even watching. Seeing people in person and who wrote me privately said they watched loyally everyday and would quote back to me from my videos better than I can - and wanted a consult. Just keep posting, sowing, and serving.