Coach's CEO Toolkit

Business Operations Workflows

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What best practices are there in the workflows that all coaches have?

Checklist of Best Practices for the lifecycle of your client

Business Operations Workflows

Best Practice Service
There are different phases to our work with each client and best practices you can start using right away in your business

1. Engage Network & Add Value

- Sow by serving so audience knows, likes, and trusts you
- Regularly post the same content across social media platforms, making an invite to a Consult every 4th-7th instance
- Repost most popular social media post of the week to email list, making an invite to a Consult once a month
- Build out favorite posts to be lengthier blog articles on website, search engine optimized so prospects find you when searching on Google for related topics
- Strike up conversations, introducing yourself as a life coach, get curious about everyone you meet, be bold about offering to hop on a call with them to help

Need Inspiration?
- Format: Hook, Story, Call to Action
- Characteristics: Actionable, Relevant, Comprehensive
- Purpose: Educate, Inspire, Aspire
- Relevant: Speak to the specific problem or symptom that is plaguing your prospects
- Informative: What am I offering and what does the prospect need to do in order to get it?
- Friendly: Should read natural, not like a promotion
- Mindset: Marketing to grow your business is always a priority and a daily practice

2. Interested Contact Joining Audience

- When a member of your audience expresses interest and opts in
- Add contact to Contact Tracker to nurture and monitor touchpoints
- Invite contact to follow social media accounts on different platforms
- Offer lead magnet (free gift) to obtain email address and delight contact
- Thank You page immediately following entry of email address should offer invite to Consult to build on the momentum they already have in engaging you
- Add contact's email address to Mail List in MailChimp so they receive emails
- Personally invite contact to Consult

A word of caution
Just because someone has opted into your audience does not mean that they want coaching or want to be sold. Just keep serving, including giving opportunities for them to level up with more support. Remember, if they want your help they now know where to find you!

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3. Consult - When an interested prospect agrees to a consultation

- Research prospect by reading their social media and online search
- Prepare prior to consultation by cleansing self for total focus on the client
- Utilize your tailored Consult outline building on what has worked well for you
- Utilize a template to take notes and be able to deliver powerful summaries
- Welcome objections as your first opportunity to coach the client on their first breakthrough
- Don't leave the call without processing payment information over the call, scheduling a follow up discussion to close the loop within 48 hours, or hearing a confident and clear no
- Have payment link ready to share on the call and have scheduling link ready to book the follow up discussion
- Have your personal requirements ready to interview the prospect, what criteria are required to work with you, what are dealbreakers (i.e. talking bad about more than one coach / program used previously) and how to gently let prospect go without offering to work together

Mindset for Consults:
- First get curious
- From here to there
- Don't believe their story
- Hear the problem behind the problem
- Hold the thought that you are attracting exactly the right people at exactly the right time
- People want coaching from me and are ready to pay for it to get change now

4. Client Onboarding - When a consult is successful

- Collect payment using payment link
- Send contract for signature
- Schedule first session and / or agree standing timeslot
- Send client intake form to capture baseline of where client is starting
- Share access to online program if part of your 1:1 coaching engagement
- Share client check-in form to be used ahead of 1:1 coaching sessions to maximize their time with you
- Agree what messaging tool will be used for communication between sessions

Aim to Delight:
- This is a part of our coaching process that is often overlooked
- Take as much work off of your client as possible with clear and concise updates and instructions
- Spending the time to do this thoughtfully once will go a long way as you will reuse it for each client

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5. Coaching - Conducting the coaching session

- Cleanse yourself with confession and prayer before beginning, journaling as needed
- Review notes from prior session / consultation
- Pull up coaching notes template
- Be present and use Core 4
- Gauge baseline with numbers
- At end of session ask what was most valuable from the session, what their takeaway is, change on quantitative scale from start of session
- Agree next steps and how coach can support client
- Set a reminder in your phone / calendar to do the next steps requested
- Schedule upcoming session in Calendly using number of session in the title
- Revise notes for recap to client
- Remind client of upcoming sessions in recap
- Share details of session recording for client use

Mindset for Coaching:
- High intention to serve
- Low attachment to outcome, don't chase transformation, instead meet your clients where they are

6. Renewals - When coming to the end of a package

- Ask client if they would like to conduct a strategy session to take stock of their growth since the start of the package and to set new goals
- Plan their next steps and determine if coaching can help them get there
- Request client case study and schedule it separately or send questions
- Request feedback as a coach

Mindset for Renewing:

Even a client who thought they were worth investing in at the start of the engagement may start to wonder whether it is still worth it, whether they have used up their budget of time, energy, and money on themselves. Help them see the story they are creating around coaching and if there are results they want to fight for, show them the way.