COACHES BREAKTHROUGH *Planner*

Getting Your First (& Next) Clients

A RESOURCE FROM

Coach Cheryl Thacker

Successful Coaches ENTERPRISE

This Planner

Belongs to:

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About Coach Cheryl

Hey Coach Cheryl here! I'm the Founder and CEO of Successful Coaches Enterprise LLC, where I've been pouring my heart into coaching for 14 amazing years. After navigating the roller-coaster ride of the corporate world for over 25 years, I've combined all those hard-earned insights with online strategies to whip up my own secret recipe for success in my programs inside the Coaching Biz Academy.

From speaking on international stages to interviewing the who's who of the industry on my own podcast, "Master Your Coaching Biz, The Podcast" I've been lucky to connect with incredible people all over the globe. Every conversation, every shared strategy is a step towards driving growth and sparking aha-moments for both personal and business development.

I absolutely love to roll up my sleeves and help coaches, consultants, and service providers start and grow their businesses. There's nothing more thrilling than watching you bloom and succeed in your journey. After all, I firmly believe in the power that resides in each of us, and I'm on a mission to unlock that in everyone I work with, one success story at a time. Let's do this together! I would love to invite you to a FREE ***Business Breakthrough Session*** to help you bust through any blocks you may be experiencing in your business. **CLICK HERE** to schedule it!

To Your Success!
Cheryl Thacker. PCC, BCC
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How to Use Your Planner

Getting your first client is a crucial step in establishing yourself as a coach. It's an important milestone in terms of building your confidence, as it's proof that someone is willing to pay for your services. You know you're providing value to them.

It's that first step toward generating income from your skills and laying down the foundations of a successful business.

In this planner, you'll follow a step-by-step process for the quickest route to signing your first paying client. The planner is divided up into 7 steps:

- **Step 1:** Identify Your Ideal Client
- **Step 2:** Pick Your Packages
- **Step 3:** Get Your Paperwork Ready
- **Step 4:** Plan Your Marketing
- **Step 5:** Run 1:1 Conversations that Convert
- **Step 6:** Sign Your Clients Up
- **Step 7:** Onboard Your Clients

Complete all the steps in the planner and be consistent with your marketing, and before you know it, you'll have your first (and next) coaching clients.

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Your Business Checklist

It's up to you to take responsibility to ensure your coaching business is set up and operates according to the laws where you live and work. The details may vary, so if you aren't sure, check the regulations in your country, state, or local area.

Before you can get started with Step 1, here's a checklist for you to complete. It will guarantee you're in a strong position to start attracting clients.

Answer the following 10 questions:

	Yes	No
Is your business set up according to the regulations in your country?	☐	☐
Do you have a business bank account?	☐	☐
Have you undertaken coaching or other relevant training?	☐	☐
Do you have the necessary qualifications to operate in your country?	☐	☐
Do you have professional indemnity insurance or the equivalent in your country?	☐	☐

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	Yes	No
Have you checked out your local laws such as licenses for working from a home office or public liability insurance if you have a separate office?	☐	☐
Do you have a privacy policy?	☐	☐
Do you have a terms and conditions document?	☐	☐
Is your business compliant with data protection legislation?	☐	☐
Do you have a payment gateway so clients can pay you securely by credit and debit cards?	☐	☐

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If you answered ‘No’ to any of the questions, then spend time getting all your essentials set up before you start attracting clients.

Make notes to detail what actions you need to take.

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Step 1:
Identify Your Ideal Client

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Identify Your Ideal Client

Even though experienced coaches can help people with any issue, when you start coaching, it makes sense to pick areas you know something about such as:

- Leadership coaching
- Life coaching
- Health & wellness coaching
- Parent coaching

This will help you feel more confident and make you more credible to the client.

Any coaching training you've taken may have prepared you for a certain type of coaching, but if not, decide on your niche before you pin down your ideal client profile. This could be quite specific such as:

- Debt coaching
- Post-divorce coaching
- Career development coaching for moms returning to work

Use the cheat sheet at the end of the planner to help with this.

Write down your coaching niche:

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Your Ideal Client Profile

Now that you've nailed your niche, you can consider the type of client you want to attract.

As this will be your first client, you need to think about those people you feel most in tune with and those with which you'd like to work. It's important to identify who you wouldn't like to work with too.

During your coaching training, you might have had some sessions with practice clients which will help you define your ideal client.

Draw up a detailed picture of an ideal client to include demographic (factual data) and psychographic (interests, attitudes, and personality) information by completing the profile.

Make a list of the following information about your ideal client. If necessary, use your imagination to envision the people you'd most like to work with until you can gather hard data.

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Demographics

Age:
Geographic location:
Gender:
Income level:
Education level:
Marital status:
Occupation:
Employment status:
Languages spoken:
Ethnicity:
Home owner:
Household size:

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Psychographics

Personality:
Attitude:
Values:
Hobbies:

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Psychographics

Goals & dreams
Lifestyle:
General behavior:
Political and/or Religious Views:

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Your Client's Needs

Now that you're clear about who your ideal client is, you can find out what they need help with.

You can do this in various ways:

- Speak to anyone you know who fits your target market and ask them.
- Join relevant professional groups on LinkedIn to see what your fellow coaches are dealing with.
- Visit social media groups where your ideal audience hangs out and take note of the discussion.
- Post questions on Facebook or Instagram and see what results you get.
- Create a simple survey and ask people to fill it out in exchange for a small gift.

Brainstorm the specific places you will use to investigate your ideal client's goals and challenges.

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Pick 3 ways you will focus on to find out the specific challenges your audience is facing right now.

1.	
2.	
3.	

Write down your results:

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Step 2:
Pick Your Packages

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Pick Your Packages

The idea of coaching is to provide ongoing support to your clients and not just a one-off session. This is because it takes time to achieve goals. Now you know the challenges your ideal client is facing, you can begin to plan the type of help you can provide to achieve the change they desire.

Many coaches offer packages that include a set number of coaching sessions. Going this route, you only get those clients for your coaching services who are genuinely committed. These will be the clients you'd like to work with because they take coaching seriously. They want to see results.

Here are some examples of coaching packages:

Business Coaching Package – "Start-up to Success"

With this 90-day package, we'll work together on your business idea and transform it into a reality. You'll define your outcomes, goals, and processes. We'll unearth and remove any blocks to success you may be carrying, and we'll work together to decide on your brand and marketing.

Career Coaching Package – "Your Career Transitions Package"

In this 12-week package, you'll have the space to be your true self. We'll work together to help you discover who you want to be. You'll work through your uncertainties about continuing in your current role and identify your unique strengths and characteristics. Then you'll plan goals for the next steps on your career path.

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Book Coaching – "Get It Published - Book Mastermind Program"

In this 6-month program, we'll work together on a non-fiction book that will raise your profile as an expert, spread the word about your work, and bring in new clients. You'll follow my proven process to get your book published so you can make the shift from wishing your book was done to holding it in your hand.

Health and Wellness Coaching – "Transformational Health Kick Start"

This 12 week package is for woman who is committed to making herself a priority. We'll work together to organize and manage your time so you have less stress, more energy and more time for you to do the things you love. You'll work through maximizing your nutrition, improving your exercise habits, and de-stressing, and much more depending on your wellness goals.

You'll notice that these descriptions point to a result, state the timeframe, and have a short package title.

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Design Your First Coaching Package

To design your package:	
1.	Write down the overall goal of the package:
2.	Clarify the end results for the client:

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3.	Decide how long it will take you to get those results: *(For the first package aim for between 3 and 6 months. This will allow time for the client to get results and also for you to increase your experience)*
4.	Choose the frequency of sessions: *(E.g., weekly, bi-monthly, or monthly. Make sure you allow enough time between sessions for your clients to take action)*
5.	Pick a name for your package: *(Choose one that's short, memorable, and indicates the result)*

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6.	Write a full description of your coaching package you can use in your marketing: *(Use the examples to guide you)*

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Additional Services

The last thing is to decide what additional services your package will contain. There can be various things like check-in calls, email access, and accountability checks through chat apps. Keep it simple for your first client. You can always add things later. Be careful not to over-promise. Answering daily emails from a client can double the time you spend with them.

What additional services do you want to include in your package?

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Price Your Package

Pricing any service is a bit experimental to start with. But, even if you're a brand new coach, you're enthusiastic and dedicated to helping bring about the transformation your coaching clients are looking for. Therefore, you deserve to be paid a decent rate. Don't start your coaching business underestimating your worth!

Ask around and research coaching fees for your niche, but only settle on an hourly figure you feel is reasonable. Then multiply that by the number of sessions in your package.

Don't forget to add in the additional services. Suppose you decide to work with your client 4 hours a month plus an additional 10-20 minutes a week over email. Make sure you're making an amount equivalent to the time you're investing.

What hourly rate have you decided on for your coaching fee?
What is your total package cost including additional services?
Write down everything you feel about that price.

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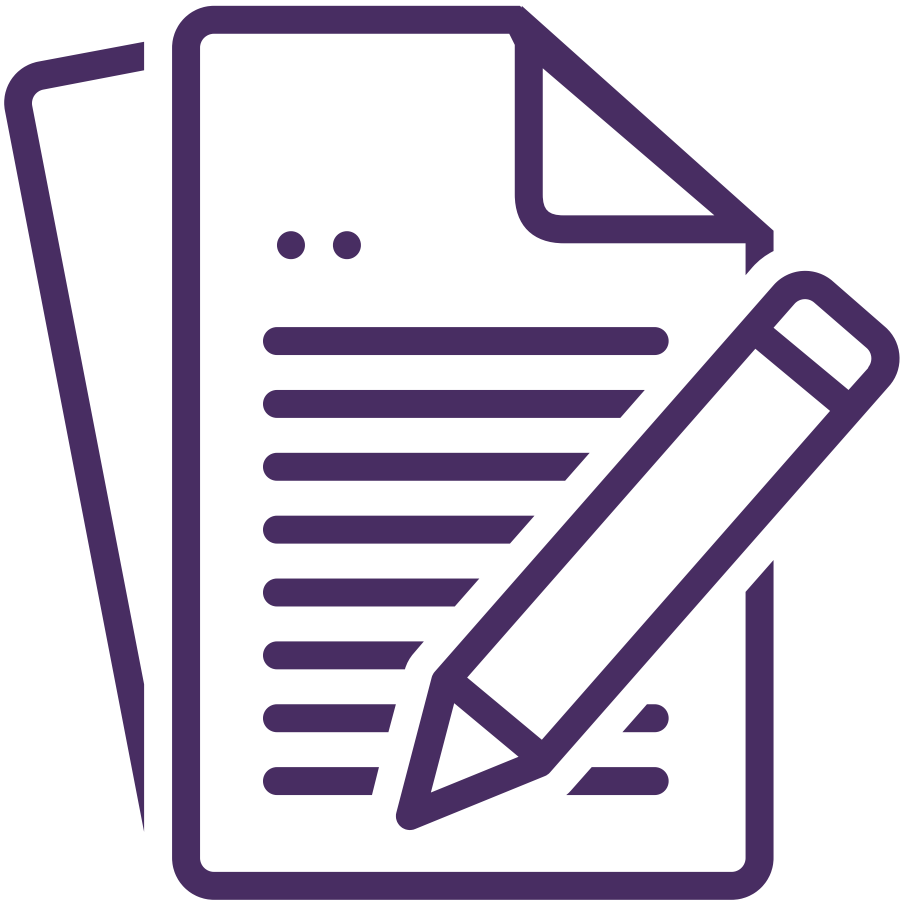

Step 3:

Get Your Paperwork Ready

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Get Your Paperwork Ready

It's necessary to have all your documents in order before you start marketing your services.

Even if you start with only a handful of clients, you must make sure you've got the administration side organized adequately so you can operate efficiently.

You'll need to create forms that include to following:

Coaching agreement – Use this to set out your terms for the coaching program and payment methods, and have your clients sign it.

Intake form - You'll use this form at the onboarding stage to collect data from clients like addresses and contact details. You can also ask questions about their goals for the coaching program.

Accountability form - Use this form to check progress and motivate your clients to keep taking action between sessions.

Invoice proforma - Prepare a template you can use when you send 'paper' invoices or use billing software like Quickbooks, Paypal, or Stripe.

You must also make sure you have a safe and confidential storage area available for your completed forms and other notes you take to comply with data protection legislation.

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There are many free forms available online, as well as templates in programs like Word. Do a little research to see what fits your business, then, on the following pages, outline the details to include in your own forms.

Intake Form:

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Coaching Agreement:

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Accountability Form:

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Answer the following questions:

Do you have billing software?

If not, do you have an invoice template?

Do you have a safe and confidential storage area in your office or online to store client documents?

Make notes of any other administrative documents you will need.

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Step 4:
Plan Your Marketing

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Plan Your Marketing

At last, everything is set up, and you're ready to start marketing.

Your first step is to establish an online presence. This reinforces your business as a professional entity, generates trust, and provides prospects with information. However, don't use this as an excuse to avoid seeking out clients. Do the minimum you need to get set up online, then move on to marketing tactics for getting your first client.

You could set up a full website, but that's time-consuming. It's enough for a new coach to have a landing page. Use a provider like LeadPages or Click Funnels for this. You'll find lots of templates to choose from to help you create the page and links. You'll need to include:

- Service offers and benefits to clients
- Biography
- Call-to-action
- Social media links

You'll want to choose branding to go on your page that includes your colors, font, and visuals like photos or images.

Your call-to-action is all-important as that's your invitation to book a 1:1 call with you. Sign up for a scheduling tool such as Acuity Scheduling, SimplyBookMe, or Calendly so clients can make appointments online.

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Your Online Presence

Write down all you need for your branding:
(e.g., colors, fonts, images, logo)

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Create the content for your landing page:

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Sign up for landing page software	☐
Sign up for scheduling software	☐
Create a profile on LinkedIn and other social media platforms	☐

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Who to Market To

That first client is probably already known to you. Start with the first group below, and then move on to the others as you need to.

1.Closest contacts. The best place to find your first client is among your friends, family, colleagues, or fellow coaching students. Email this group and explain that you now have your coaching business up and running and that you're ready to take clients. Ask them to refer anyone to you who might be looking for your services. They'll probably know someone who is. (If you have customers from other offers, then contact them too. For example, you may sell online courses, and you're adding 1:1 coaching to your services.)

2.Current network. If you don't get your first client from your closest contacts, reach out to others in your network. These might be contacts on LinkedIn or other social media platforms you've been on for a while. Also, put yourself in front of your ideal client by networking, speaking at events, attending local meetups, and getting invited to podcast interviews. In short, tell everyone you can.

3.Content marketing. This is a longer-term strategy and involves marketing through blogging, video creation, running free workshops and webinars, and promoting livestreams on social media.

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Plan the Marketing for Getting Your First Client

Write down as many tactics as you can think of under the following 3 categories.

Choose which you'll use and create any material you need, e.g., an email to send out to your closest contacts.

1. **Action to take with your closest contacts**
2. **Actions to take with your current network**
3. **Actions to take with content marketing**

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1. Action to take with your closest contacts

Brainstorm Tactics:
Choose Tactics:

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Create Materials:

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2. Actions to take with your current network

Brainstorm Tactics:
Choose Tactics:

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Create Materials:

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3. Actions to take with content marketing

Brainstorm Tactics:
Choose Tactics:

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Create Materials:

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Step 5:

Run 1:1 Conversations that Convert

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Run 1:1 Conversations that Convert

Most coaches make sales through 1:1 conversations with potential clients. For something so personal, you need to spend time with them exploring their issues and explaining what you can do to help.

When you're planning your conversation, think of it as 2 parts:

1. **What they need**
2. **What you have to offer**

What They Need

Find out more about the person and what they're looking for so you can judge if your package is a good fit for them and vice versa.

Here are some key questions to use:

- Where are you now with X [your prospect's challenge]?
- Where do you want to be with X?
- What's stopping you?
- What's it costing you to stay where you are?

Draft 5 questions you can use to find out more about your prospect's needs and desires.

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1.	
2.	
3.	
4.	
5.	

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What You Have to Offer

This is when you present your package. The reason people say 'Yes' to an offer is that they want to solve a problem, achieve a result, or both.

You know you have something that can help them, so you need to describe a simple, doable path that takes them from A to B. Develop proficiency in laying out the steps you use to take your clients from their current situation to their desired result.

Whatever pricing you've set, say it with confidence, explaining the value they'll receive. That will instill trust in your clients to purchase your package.

Review the description of your coaching package that you created in Step 2:
Is it a clear description of how your clients will move from their current situation to their desired result?
If not, make any adjustments you need:

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Write down exactly how you'll present your complete offer:

(Practice delivering this script out loud so you become more comfortable with it.)

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Step 6:

Sign Your Clients Up

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Sign Up Your Clients

Once your new client has agreed and is happy to go forward, you need to proceed to payment and decide on dates.

Payment

They could pay by credit card, in response to an invoice, or whatever payment platform you've chosen. However, it's a good idea to take some payment at the end of the call, even if it's a portion of the total price. That will help them feel committed to the program and show you that they're serious.

You might have decided to offer a payment plan where there's an option to either pay in full for a discounted price or to pay over a period of time, such as monthly for 6 months for a higher rate. If you do this, it's a custom practice to add around 10% to the total price.

Dates

Try to plan the dates for all the sessions in advance. That will help your workflow and also set the program in the client's mind as a regular fixture. It often makes sense to choose the same day and same time of day for the sessions to instill regularity in the work.

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Have the client pull out their schedule and enter the dates before you end the session. Again, that's part of the commitment. If you can't agree, then ask them to go to your scheduler (remember you set one up earlier) and choose dates.

If you really can't secure the dates for all the sessions in the package, then make sure to set the date for their first meeting.

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Checklist

Check your payment processes and ensure they allow you to take credit or debit card payments	☐
Decide what amount you'll ask for to secure the booking	☐
Fix the date for your first coaching session	☐
Explain how they will be delivered, e.g., via Zoom, at your office	☐
Book all other dates if appropriate	☐
Send the coaching agreement and other material straight away	☐
Welcome them to working with you	☐

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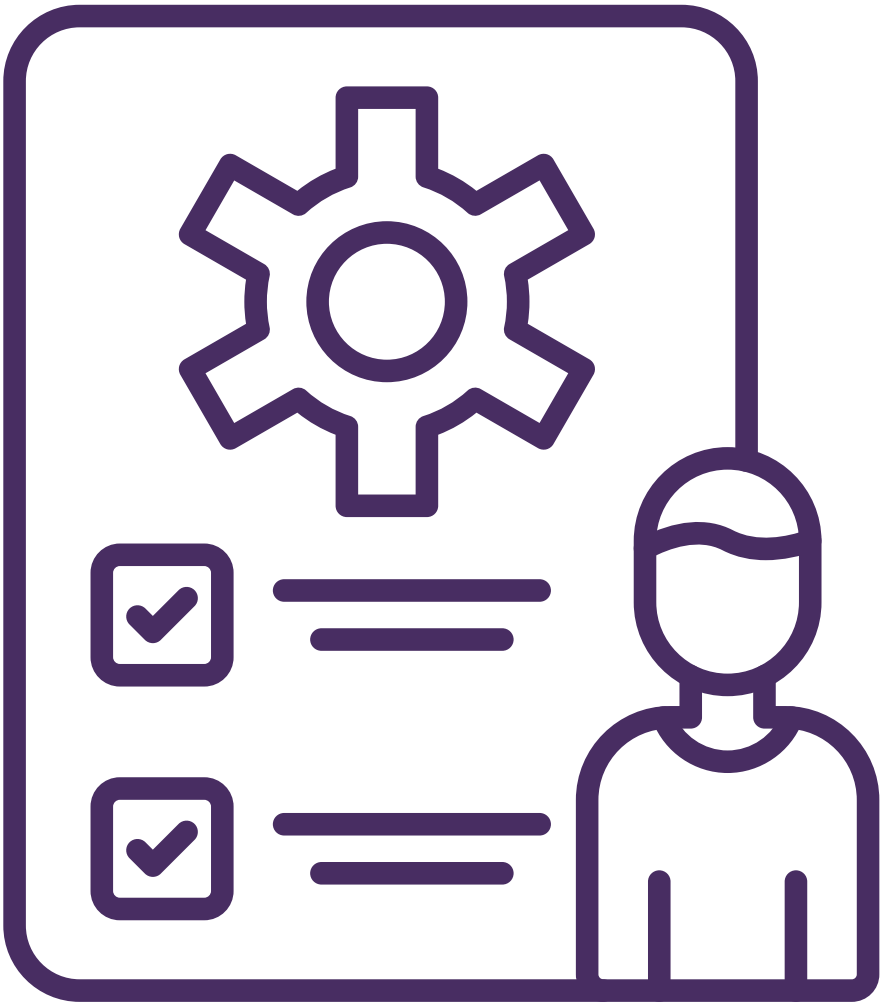

Step 7:

Onboard Your Clients

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Onboard Your Clients

Client onboarding is the process of welcoming new clients and making sure they understand the services they'll be getting.

Prepare a welcome packet to onboard them. Send it out immediately after they sign up for coaching. It should include:

- A welcome letter/email.
- Your coaching agreement. Make sure your client understands and agrees to the terms.
- Your intake questionnaire.
- Explanation of any systems you use, e.g., video conferencing software, bookings software.
- What they need to do next e.g., watch an introductory training video, complete and return the intake questionnaire...

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Offer an Onboarding Session

You could offer a short session where you go through all the paperwork and make sure they are clear on the mechanics of your program.

This only needs to be around 20 minutes long and should take place after you've sent out the welcome packet. They need a little time to read and digest the information.

Your focus in the session is to check that they agree to what you have in your coaching agreement and coaching plan but you'll answer any other questions they have, of course.

Some time invested at this stage can save time and confusion later.

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Plan Their Onboarding Process

Write down what you want to include in your client's onboarding process.

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Congratulations!

By following the steps in this planner you'll have recruited your first client and maybe others. There will be more to come as you build on your experience and grow your business.

If you are looking for support to launch, relaunch or scale your coaching business. I can help. Check out my programs at the end of this planner.

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Need support? I'd love to help!

MY PROGRAMS

DETAILS FOR EACH TIER

Coaches Launch Lab

A community where you can learn the steps to build an audience of raving fans who want to work with you, create an offer that has them raising their hands, and deliver your program providing amazing transformation for your clients.

$27
/ MONTH

- Doors always open
- Cancel anytime
- Money back guarantee

READ MORE

Pro-Coach Collective

An elevated experience for coaches who are looking to take their business growth to the next level, with advanced strategies and tactics to help you scale your business.

$77
/ MONTH

- Waitlist only
- Cancel anytime
- Money back guarantee

READ MORE

Coaching Biz Accelerator

A group coaching program to build a successful, sustainable business so you can serve your clients in the best way possible and create the freedom you crave in your life.

$1777
PAYMENT OPTIONS

- Doors always open
- Cancel anytime
- Money back guarantee

READ MORE

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