



# Get Out of Corporate and Get into Coaching

## Are You Ready to Get Out of Corporate and Get Into Coaching?

Print out this guide so you can go through the Trifecta Approach for Creating Your Transition Plan

**Step #1** - Identify your top values & fill them in here (NOTE: I invite you to draw from the work you did during your LPT training)

My top five values

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Step #2:** Complete your Non-judgmental Readiness Assessment.

### PERSONAL FINANCES AND BUSINESS CASH FLOW FOUNDATIONS

- ☐ I have identified and implemented ways to cut my living expenses
- ☐ I live by a personal budget
- ☐ I have created a budget for my business (marketing, support, website, etc.)
- ☐ I have a bookkeeping system set up to faithfully track business earnings and expenses (or have identified someone to assist me with this)
- ☐ I have at least three streams of income and at least one is passive
- ☐ I have a separate bank account set up for my business
- ☐ I have identified a health insurance plan and included it in my budget
- ☐ I have at least three to six months of basic living expenses in savings or someone else who can support my household financially
- ☐ I have projected revenue from my business for at least the next three months
- ☐ My monthly living expenses are \_\_\_\_\_
- ☐ The amount I need to save \_\_\_\_\_
- ☐ My current savings are \_\_\_\_\_

Score \_\_\_\_ out of 12



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## BUSINESS PLANNING AND OPTIMIZATION

- ☐ I have a mission and vision statement for my business
- ☐ I am crystal clear on my target market and the transformation I want to create for them
- ☐ I have an effective elevator pitch
- ☐ I know who my direct and indirect competitors are and how my offering is different from them
- ☐ I have identified strategic partnerships and referral sources for my business
- ☐ My email list management system is established
- ☐ I have a way to accept payment on the spot
- ☐ I have a basic website for my business (or am in the process of launching one)

Score \_\_\_\_\_ out of 8

## CONNECTIONS AND ACCOUNTABILITY

- ☐ I know how to reach my target market
- ☐ I have a business coach/mentor
- ☐ I have a group of like minded people I can count on for support and accountability
- ☐ I have identified other professionals (within and outside of the coaching community) I can partner with to grow our businesses
- ☐ I have gathered list of my contacts from my current job who will support me in my transition

Score \_\_\_\_\_ out of 5

## PERSONAL DEVELOPMENT AND PRODUCTIVITY

- ☐ I am confident in my ability to operate a successful business
- ☐ I am willing to charge what I am worth without any apologies
- ☐ When prospects choose not to work with me, I don't take it personally
- ☐ I can follow a daily schedule without oversight
- ☐ I am free from procrastination issues
- ☐ I am open to asking for help when I need it
- ☐ I am dedicated to continuing my personal development

Score \_\_\_\_\_ out of 7

TOTAL SCORE \_\_\_\_\_ out of 32



## Get Out of Corporate **and** Get into Coaching

**Step #3:** Mind the gaps. Look at the gaps in step #2 and create strategies to fill in the gaps based on the top values you listed in step #1 and your I AM statement. In order to create an authentic, stress-free transition, you'll want to make sure each action item gets on the fast track to getting into full-time coaching while keeping your sanity.

I AM statement: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Strategy #1

Action Item:	Due Date	Fits in with my values?	Fits in with my I AM statement
1 _____			
2 _____			
3 _____			
4 _____			
5 _____			
6 _____			
7 _____			
8 _____			
9 _____			
10 _____			

### Strategy #2

Action Item:	Due Date	Fits in with my values?	Fits in with my I AM statement
1 _____			
2 _____			
3 _____			
4 _____			
5 _____			
6 _____			
7 _____			
8 _____			
9 _____			
10 _____			

### Strategy #3

Action Item:	Due Date	Fits in with my values?	Fits in with my I AM statement
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

### Strategy #4

Action Item:	Due Date	Fits in with my values?	Fits in with my I AM statement
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

### Strategy #5

Action Item:	Due Date	Fits in with my values?	Fits in with my I AM statement
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			