

CREATING COACHING CLIENTS

*A Step-by-Step Guide
for Newer Coaches*

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The logo consists of the letters "LCM" in a bold, black, sans-serif font, enclosed within a thin black oval border.

LCM

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Hi, I'm Jen.

When I first started my coaching business I was very overwhelmed. I felt like I'd discovered my calling in life when I found coaching, but now I had to figure out how to run a business too.

It was a skillset that I never even really wanted to have. But if I wanted to coach, and I did, I was going to have to figure it out. I had to find a way to connect with the people who really wanted my help. People who were hungry for help.

And so I started throwing spaghetti at the wall to see what would stick. I did Instagram lives. I wrote emails. I posted on social media. I created a mini-course. I spent a lot of time on the internet. I gave out my email address in exchange for so. many. freebies. Which left me more confused, sitting on a pile of conflicting advice.

Through trial and error and lots of experimentation, I managed to get my first coaching clients.

My First Coaching Clients

My first paid client was my dad. :) He hired me for 6 weeks for \$200, and 4 years later, he still talks about how much it helped him.

My second paid client was a total stranger who lives in Sweden. She'd been watching my Instagram lives, and after a few weeks, she took me up on an offer to come to a free consult. At the end of the consult, I made her an offer to work together for 3 months for \$500, and she said yes.

My third paid client took me up on a \$99 offer for 4 weeks of coaching. She then resigned for a \$1,000 package. And then a \$2,500 package. And then a \$5,000 package. And then a \$10,000 package. I literally jumped up and down when I got that first \$1,000 payment.

Why I Created This Guide

In those early days, when I was throwing spaghetti at the wall to see what would stick, I felt like I was all over the place, and probably doing it all wrong. I wanted to feel like I was following a system.

In this guide, I want to give you what I wish I'd had: A step-by-step guide you can use to create clients.

You'll still have to throw your own spaghetti at the wall, so to speak. You'll still need to experiment. But you can experiment within a step-by-step framework that will definitely work.

Your Coaching Business is Like a Lemonade Stand

In this guide, we're going to remove the drama around signing paid coaching clients.

Think about when you were 5 and you opened a lemonade stand with your friends. You made some lemonade. You put up a sign. You smiled at people walking past. When people walked up, you told them the price, they handed you some money, and you handed them some lemonade. And probably the wrong change.

Your coaching business doesn't need to be more complicated than this. You create an offer. You tell people it's available. You accept their money. And you hand them some lemonade.

Except in our case, the lemonade is coaching. But your coaching business really can be this simple.



CHAPTERS

① Manage Your Brain

Maybe you didn't do this when you were 5, but imagine how much lemonade you would've sold if you'd known about mindset work back then. But seriously, managing your own brain is the most important thing you can do for your coaching business.

② Create Your Offer

This is like creating the lemonade. And we've got an easy recipe you can follow to create your offer.

③ Sell Your Offer

This is like making a sign, waving it around, and accepting customer's cash. Thankfully with the internet, there's a lot more marketing options.

CHECKLISTS

Setup Checklist

- Create your offer**
 - Choose who you want to help
 - Choose a result
 - Choose a process
 - Choose a price
 - Write down your offer
- Get set up to sell**
 - Set up a scheduling tool
 - Set up a meeting tool
 - Set up a payment option
- Sell your offer**
 - Set up social media (see page 24)
 - Do the daily checklist
 - Do a consult
 - Do a coaching call
 - Rinse & repeat

Daily Checklist

- Do thought work
- Post to your feed
- Post to your stories
- Engage on social media

If this feels overwhelming, don't worry. We're going to go over each of these steps in more detail in the chapters ahead.

CHAPTER ONE

MANAGE YOUR BRAIN

The steps in this course are simple. But there's a good chance your brain will try to make it more complicated.

Your brain may offer thoughts like:

You should be doing something more. Or something different. Or maybe, you're not qualified or experienced enough. Or whichever flavor of unhelpful thoughts your brain likes to dish up.

When working on your coaching business, these thoughts usually fall into one of three categories:

- ① Thoughts about yourself as a coach
- ② Thoughts about your offer
- ③ Thoughts about your potential clients

If you can train your brain to think (and believe) helpful, empowering thoughts about each of these, you'll find it so much easier to sign clients and grow your coaching business.

Mindset work has you ask: What am I even thinking, and do I want to be thinking that? Is there something else I would rather think instead?

There are 3 elements of mindset work:

- ① Bringing awareness to your thoughts
- ② Identifying helpful & unhelpful thoughts
- ③ Transforming & practicing a new mindset

Managing your brain through mindset work is a vast topic, but it can also be very simple.

We've created a worksheet you can use daily to do thought work. It can be done in as little as 5 - 10 minutes.

You can print it out or simply follow the instructions and write in your journal or a blank piece of paper. Add your own questions or modify as needed.



THOUGHT WORK 101

INSTRUCTIONS

- Free write for 3-5 minutes (unprompted or use one of the prompts below)
- Circle the thoughts you want to play with
- Use the Reframing Questions below to play with your thoughts
- Create new thoughts you want to keep (use Bridge Thoughts & Empowering Statements if helpful)
- Write down your new thoughts somewhere you'll see

WRITING PROMPTS

- What am I thinking about myself as a coach?
- Do I believe my offer is worth 2x the price? Why or why not?
- What thoughts am I having about my audience and potential clients.
- From 1-10, how much do I believe I will sign a client this week? Why? What would I believe if it was a 10?
- Write a letter to yourself from your future self (who has already signed several clients). What do they want you to start/stop thinking and doing?
- Do you 100% believe you will sign a client this week? Why or why not?

REFRAMING QUESTIONS

- Why? So what?
- Do I love this thought?
- Is this really true? What else could be true?
- Is it possible I'm wrong about this?
- Is this thought useful to me right now? Why or why not?
- What would [insert person] think or say about this?
- Why am I choosing to think this?
- What would this look like if it were easy? What if I did know what to do?
- Why is this a problem?
- What would be different if I didn't think this?
- If you could see your whole life, from birth to death, what would you think about this thought or moment?

BRIDGE THOUGHTS

- It's possible that...
- I'm learning to...
- Some people think that...
- I'm becoming someone who...
- I'm open to believing...
- I'm finding evidence that...
- Maybe...
- It's safe to believe...

EMPOWERING STATEMENTS

- I'm a really good coach.
- Money comes easily to me.
- My coaching helps people create positive results in their lives.
- My next client is already in my circle.
- There are people who want what I have to offer, and they're waiting for me to offer it.

THOUGHT WORK 101

FREE WRITE

READ / CIRCLE A THOUGHT TO WORK ON

IS THIS REALLY TRUE?

WHAT ELSE COULD BE TRUE?

WHAT DO I WANT TO BE TRUE?

WRITE YOUR NEW THOUGHTS

Pro Tips - Manage Your Brain

Be a compassionate observer. When doing thought work, try to be both honest and kind with yourself. Imagine that it's a friend who's expressing these thoughts to you. How would you respond? When writing, be as honest as possible and don't hold back. When reading, realize that these thoughts are just sentences in your head – they're not a reflection of who you are. If you hold back writing down what you actually think for fear of judgment from yourself, then you'll have a hard time finding the thoughts that are holding you back.

Remember the point is to feel different. Sometimes you might just need to do something to shift your energy, instead of sitting down and writing out your thoughts. Call a friend, go for walk, take a bath, scream, punch a pillow, turn on your favorite song and dance in your kitchen. Get energy moving.

Incorporate thought work into your daily living. We don't want thought work to just be something you write down in your journal and forget about for the rest of your day. One way to do this is to pick a touchstone – some event or regular time to check in. This could be: every time you open the fridge, every hour on the hour, when you get in the car, or any number of other things you do throughout the day. Pick a touchstone (or set a timer). Notice what you're thinking or feeling. Reframe or shift energy if needed. This can be a quick 30-second check in.

CHAPTER TWO

CREATE YOUR OFFER

Creating an offer is like making the lemonade for your stand. You don't want someone walking up to your lemonade stand, asking for lemonade, and then not knowing what to give them.

You want to know what you're selling, how much it costs, how they pay you, and how you'll deliver it. And it really can be as simple as making lemonade.

This chapter includes a worksheet with a simple recipe you can follow to help you create your offer, as well as ideas for how to get set up to start selling it.



CREATE YOUR OFFER

RECIPE

- Choose who you want to help
- Choose a result
- Choose a process
- Choose a price
- Write it down

WHO YOU HELP

College students	Teachers	get control of their lives
Stay-at-home moms	Solopreneurs	lose weight on a budget
Teenagers	Freelancers	get what you want
6-figure earners	Retirees	manage their brain and their business
Busy moms	Empty nesters	create their dream life
Creatives	Caretakers	find an extra 2 hours a week
Writers	Men	grow their business
Dreamers	Women	achieve their impossible goal
Artists	You, people, etc.	find purpose and meaning

RESULT

PROCESS

- 1 month
- 6 weeks
- 3 months (weekly)
- 6 months (weekly)
- -----

PRICE

- Free
- \$99
- \$250
- \$1,000
- -----

MY OFFER

I help _____ to _____.

THE DETAILS

We work together for _____. The investment is _____.

Choosing Who & How You Help

If you already know the type of coach you want to be (who you want to help and how), awesome. Run with it.

If not, this is where you'll decide who you want to work with, and how you want to help them. In our worksheet we've included a list of suggestions.

Keep in mind, this doesn't have to be who you work with forever. This is just the coach you're going to be for now. Your business will evolve as you grow and get more experience.

Choosing a Process & a Price

In choosing a process (how long/often you will provide coaching), here are a few questions to consider:

- ① Roughly how much time do you think it might take for your clients to see a noticeable difference in their result?
- ② Are there steps or a path (things you need to teach them) in order to achieve the result?
- ③ Are there any additional resources (besides or in addition to coaching sessions) that you want to give them?

In choosing a price, choose something that feels like a no-brainer. At this stage, it's mostly about getting comfortable offering your services.

Pro Tips - How to Create Your Offer

Your offer can be very specific or very general. Maybe your offer is very dialed in, and you teach a specific curriculum. Or maybe you show up and coach them on whatever is going on in their life. You'll find lots of generic 'whos' and 'results' in the worksheet. As you get more coaching experience, it's possible you will gravitate towards a more specific 'who' and 'result.'

Challenge yourself to only work on this today. Go for a walk, meditate, take a second. But don't take too long. If you haven't decided by tomorrow, flip a coin or close your eyes and point to a spot on the worksheet. Just kidding, but seriously. Try not to over think this.

Resist the urge to change your offer too frequently. You might still experiment with different words and examples, but if you're constantly switching the details of your offer, people won't be sure what you're offering. Keep in mind, there might be people who are already in your audience talking themselves into hiring you.

There's no such thing as a perfect offer. And people aren't really buying the offer or your 'coaching' anyway. They're buying you. Not actually buying you, of course. But they're buying the result they think you can help them get.

You don't need a name for your offer. You can name it if you want, but do not get hung up on this. You can get paid clients without a catchy package name.

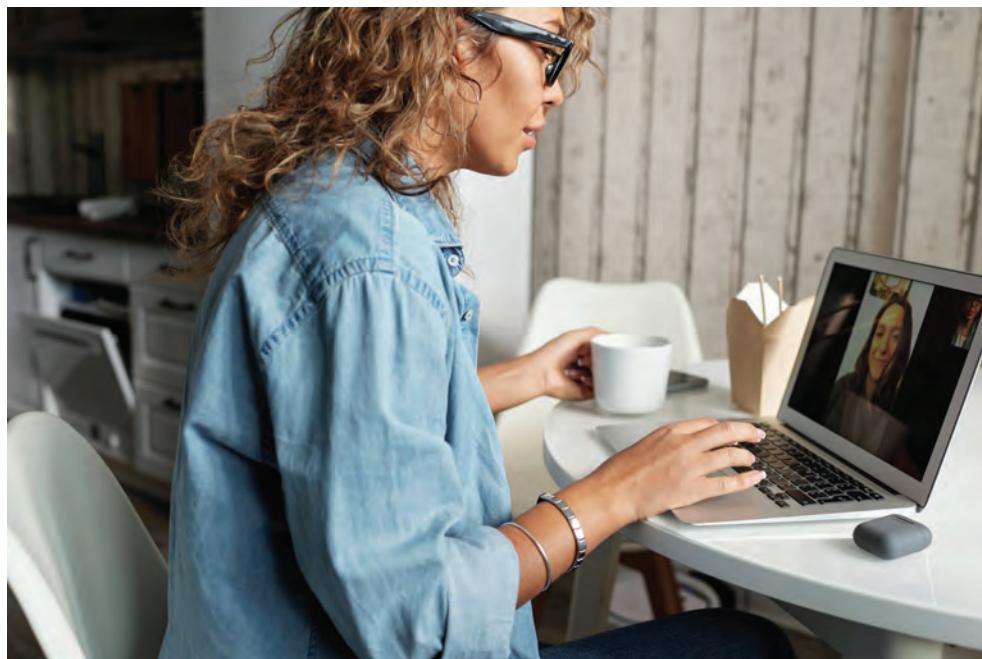
How to Get Set Up to Sell

Once you have an offer created (your lemonade), you'll want to set up shop. This is everything you need to sell your offer and accept money. You'll need:

- ① a way to schedule appointments
- ② a way to meet with your clients
- ③ a way to accept money

You could schedule appointments via DM or email, do consults and coaching calls over the phone, and accept checks in the mail. Seriously—you could do this. But here are a few tools that can help you organize your business and make it more streamlined.

If you already have tools you're using for scheduling, meetings, and payments, then go with those!



Scheduling Tool

With a scheduling tool, you can avoid messaging back and forth to find a time that works for both of you.

Calendly – Free

Acuity – Paid

Meeting Tool

Once you've scheduled a consult or coaching call, using online meeting software is a great way to do calls.

Whereby – Free

Zoom – Paid

Payment Option

You can use **PayPal** to send invoices to clients. Or you can create a product with **Stripe**, so clients can easily purchase your coaching online. Both platforms will take a 2.9% + \$.30 transaction fee.

PayPal (How to send an invoice)

Stripe (How to create a product)

Pro Tip: Don't spend too much time choosing tools. You could spend a million years researching tools, but the free tools here have everything you need to run a successful coaching business. And you can always change the tools you're using later.

CHAPTER THREE

SELL YOUR OFFER

Now that you've made the delicious lemonade (created your offer) and set up shop, it's time to start selling.

You could make a cardboard sign and go stand on the corner. But there are much more effective ways.

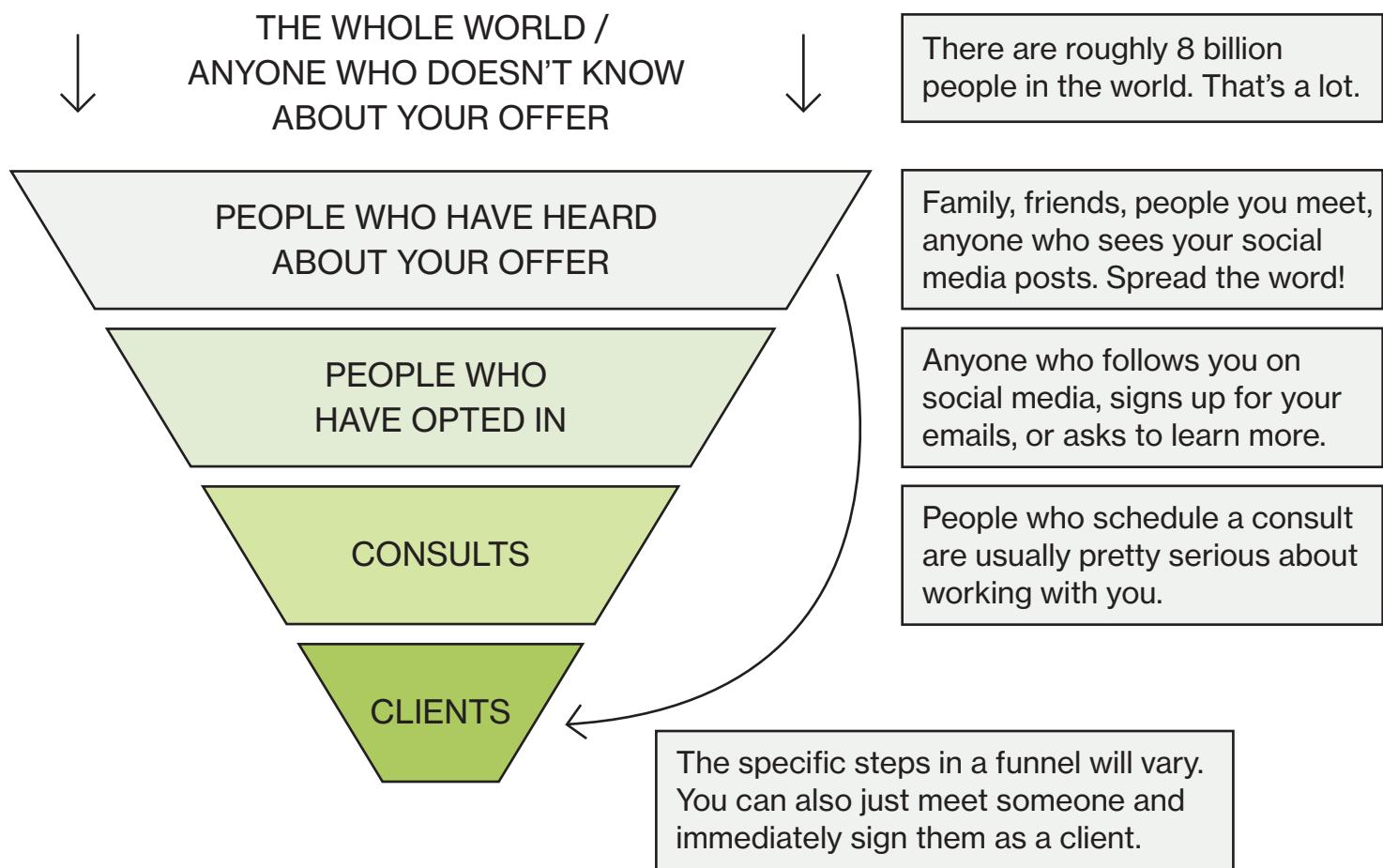
In this chapter, we're going to cover the specific, step-by-step marketing and sales strategies you can use to sign paid clients.



Marketing Funnels 101

In online marketing, you'll often hear of creating a "funnel." If you haven't heard this term, it's basically a visual representation of a customer's journey with you – from learning about your business to becoming a client or customer.

While "creating a funnel" can sound intimidating or overwhelming, the basic concept is actually very simple. And it can be a helpful framework for understanding how the individual things you'll be doing contribute to the process of signing new clients.



THE WHOLE WORLD / ANYONE WHO DOESN'T KNOW ABOUT YOUR OFFER: There are roughly 8 billion people in the world, and over 1 billion of them speak English. That is a lot of people.

PEOPLE WHO HAVE HEARD ABOUT YOUR OFFER: This can be a lot of people, too. Here are just a few of the people you can tell about your offer:

- Your family & friends
- Someone you meet at the store
- Anyone who sees your Instagram or Facebook post
- People at networking events and conferences
- Your certification program cohort
- People at that retreat you went to
- Your yoga class or gym
- Your book club, church group, or other community
- Not to mention, the friends and family of these people

PEOPLE WHO HAVE OPTED IN TO HEAR MORE: These are people who want to know more about you and what you do. Having an 'opt in' step in your funnel makes it much easier to get clients. Here are some ways people can opt in:

- Follow you on Instagram or Facebook
- Sign up for your email list
- Subscribe to your blog
- Anywhere people can get to know, like, and trust you

CONSULTS: People who schedule a consult are usually pretty serious about working with you. This is a great step for your funnel, which we'll cover in more detail later.

CLIENTS: Congratulations! You have a new client.

The Benefits of Online Marketing

Before we get into the ‘how’ of online marketing, it’s important to know that *you don’t need social media or an email list to sign clients.*

You could meet someone at the grocery store, invite them to a consult, and sign them as a client.

Literally. You can do this. And believing you can find clients anywhere is a great mentality to have, especially when you’re starting out.

But you’re limited to people who:

- 1) You know or meet personally **AND** 2) want to sign up for a consult or coaching right then and there.

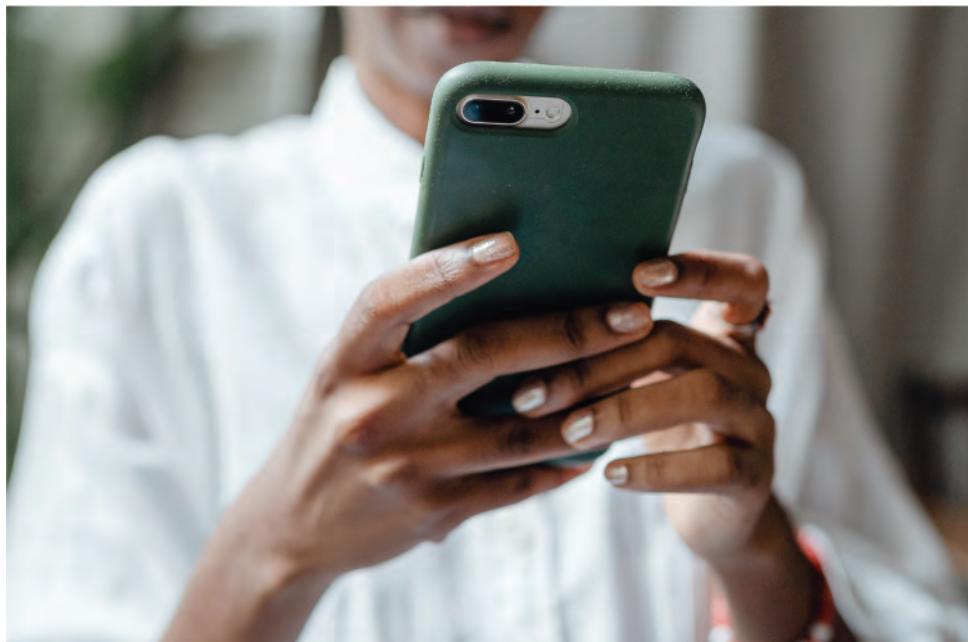
By using the internet, you can meet **way** more people, and give them a place to opt in and hang out while they learn more about you.

Pro Tip: Don't think of sales and marketing as pestering. Many new coaches are hesitant to sell or promote their offer because they think they're being annoying. But just like not everyone wants lemonade, not everyone wants coaching. You're simply finding the people who do.

How to Market Your Offer on Social Media

Social media can be an extremely effective tool to get clients. I use Instagram, so those are the steps I've outlined in this guide. But you can adapt these steps to pretty much any social media platform you want.

Whichever platform you choose, the principle is the same: the point of social media is to let people see who you are and find out what you're offering. Think of it as handing out free samples of your lemonade.



Pro Tip: You don't need a website to grow your coaching business. A social media profile is more than enough to get a solid start signing clients.

Here are the steps to get started marketing your offer on social media (specifically Instagram, but you can adapt these steps to other platforms).

Setup Checklist

- Create a social media account.** You can either use your existing social media account, or create a new one for your coaching business.
- Fill out your bio.** This is where you'll put the offer you created in chapter two.
- Add your link to your bio.** This can be a link to your scheduling tool, your Stripe product, or you can use a service like Linktree to share all of your links.

Daily Checklist

- Post to your feed (1x).** Share things that are helpful, and try not to stress about creating the perfect Instagram grid.
- Post to your stories (3x).** Stories are a great way for people to get to know you on a deeper level.
- Engage (30 mins).** This is where you meet people. Liking and commenting on posts is a great way to get more exposure.

And that's it. You don't need a comprehensive social media strategy to start getting clients.

You just need to start showing up as a coach (and seeing yourself as someone who has valuable thoughts to share), and to allow people to get comfortable enough with you to hire you.

Remember, social media is simply a way to connect with people. You're just standing on the corner, letting people know you have lemonade available.

Ideas for Using Instagram

Here are some specific ways to use Instagram. These are just ideas. You can do any, all, or none of these. Play with these ideas, and find what works for you.

In your feed, you're just sharing things that you find helpful. It's easy to get paralyzed, and think that a post isn't good enough for your feed. But you'll be surprised the things you share that might be super helpful for someone.

On Instagram, you need an 1) an image and 2) a caption. Here are some ideas you can use as a jumping off point.

Post Images

- ① [Quote \(Templates\)](#)
- ② [Picture of yourself / family / dog](#)
- ③ [Picture of your life / house / nature walk](#)
- ④ [Carousel of educational slides](#) - a tool, exercise, or step-by-step process ([Templates](#))
- ⑤ [How to Work With Me](#) - create an image that explains your offer ([Templates](#))
- ⑥ [Question](#) - thought-provoking or FAQ ([Templates](#))

Note: We've included some Canva templates. If you aren't familiar with Canva, it's a free, easy-to-use online design tool. You can create an account, edit the templates, and download the images to upload to Instagram. [Learn more here.](#)

Post Captions

In your captions, try to 1) capture attention 2) share something valuable and 3) include a call to action. Your call to action might be to schedule a consult, or it might be something smaller like saving the post, leaving a comment, or sending you a DM.

Here are some great prompts from Marie Forleo.

Pro Tip: If writing isn't your thing, or if video sounds easier or more fun, your feed posts can be videos or reels instead.

Stories

Here are 5 ways to show up in stories. You can mix and match these, or add your own ideas to show up in a way that feels right for you.

1. Educational Content

Share content that's educational and valuable. You can choose an Instagram story template from Canva that you like, or just type some words into the editor. This is an easy way to teach and share what you know. And it's low pressure, because stories expire in 24 hours.

2. Behind the Scenes

Sharing photos and videos of your daily life lets people get to see you as a real human, and relate to you in a fun, casual way.

3. Recommendations

Share things that you find helpful yourself. This could be anything. Other coaches, restaurants, products you like. Tagging other accounts is a great way to cross network as well—they might even share your story on their account.

4. Talk Straight to the Camera

This could be any of the above content ideas (educational content, behind the scenes, recommendations) or it could be literally anything else: a joke, your thoughts on Reese's peanut butter cups, you name it. Letting your followers see your face and hear your voice reminds them you're a real person, and not just words on a page.

5. Interactive Features

Instagram has a lot of fun interactive features. Using polls, questions, quizzes, and their “emoji slider” makes it easy and fun for your followers to interact with you. They can also lead to DM conversations.

Pro Tip: Pay attention to accounts you like to follow and what you like about how they're delivering content. Also consider how you like to share. Do what feels easy, natural, and fun to you.

Engagement

Engaging with other people on social media is a great way to get more exposure. Every time you like or comment on someone else's post, there's an opportunity for someone new to learn about you. Here are some ways to engage on Instagram:

Respond to comments on your posts. This is the easiest, most essential engagement you'll do. This encourages future engagement on your posts, and it's also the start of a conversation. And conversations lead to clients.

Respond to people who engage with your stories. When someone responds to your story, you get a DM. Replying to this DM is a great opportunity to have a natural conversation.

Further engage with people who like and comment on your posts. In addition to simply responding to their comment on your post, you can go to their page, read their posts, and leave a thoughtful comment on a recent post that resonates with you.

Engage with people who are watching your stories (but not responding). You'll see a list of people who are watching your stories. You can click on their name to go directly to their stories and respond to any that speak to you. You can also go to their page, read their posts, and leave a comment there.

Like posts and leave comments. Engage with posts from accounts you're following, from hashtag searches, or anywhere else you find a conversation you want to be a part of—Life Coach Magazine, thought leaders, other coaches, or even people you'd love to have as clients.

Pro Tips - Social Media

Be conscious of your social media use. It's really easy to think you're working all day, when you're actually just scrolling Instagram. There's a difference between 'working' on Instagram and just 'being' on Instagram. Choose how long you want to spend engaging daily (we recommend 30 minutes or so), and stick to it. Set a timer if it's helpful.

Be mindful of your energy. Remember you're dealing with a funnel. Not everyone you engage with on social media will become your client. Your goal with every interaction isn't to make them become a client – it's to give people a chance to know, like, and trust you, and create an opportunity for those who will become your clients to take the next step. Be in service energy – try to give more value than you take.

Think about social media as a big party or networking event. Your page is like a room where you host a discussion or talk about what's interesting to you. You can also go to other people's rooms and join in the conversation that's happening there.

How to Do Email Marketing (Optional)

You absolutely don't need email marketing to create coaching clients. But there are a lot of benefits to having a list of email addresses you can market to. So it's good to get started doing this sooner than later.

Email Marketing Tools

With an email marketing tool, you can easily collect email addresses and send out emails to your entire list at the same time. I use Flodesk because they have a flat rate for unlimited subscribers, and it's easy to create beautiful emails. Mailchimp is a great alternative that has a free plan (if you have fewer than 500 subscribers).

[Mailchimp](#) – Free (Up to 500 subscribers)

[Flodesk](#) – Paid ([Use my partner link for 50% off](#))

Email Marketing Checklist

- Create account** – Mailchimp, Flodesk, or other
- Get your signup form link** – [Mailchimp instructions](#) / [Flodesk instructions](#)
- Share your signup form link** in your bio, LinkTree, stories, DMs, etc.
- Write and send an email** whenever you're ready

Pro Tips - Email Marketing

You don't need a lead magnet. Don't feel like you need to create a freebie or resource to incentivize people to sign up for your list. While these can be very effective, you can also simply invite people to get emails from you.

You can start slow. Even if you don't want to start sending regular emails out yet, you can still start collecting email addresses for later.

Your emails don't have to be long or fancy. You can write just a few sentences. You can also just repurpose a social media post (like this [Instagram post](#) I used as an [email](#)).

Email marketing can be extremely effective. When someone gives you their email address, that's a pretty significant way to opt in—even more than following you on social media. It typically means they really want to hear from you.

How to Do a Consult

There are lots of ways to build a coaching business. Some coaches do consults, and some don't.

A consult is basically just a conversation where you see if your coaching is a good fit.

If you decide not to do consults, you could have this conversation in real life or over DMs. Then send an invoice or point people straight to your Stripe product.

But consults are nice when you're first starting out because doing them can help you clarify and solidify who you are as a coach and what you're offering. They can also help you understand common objections, so you can write better marketing copy.



My Consult Experience

When I was getting started as a coach, consults stressed me out. I felt so much pressure to get it right, to say just the right thing, and to prove that I could help.

I thought if I did everything perfectly, everyone would become a client. What I realized was that some consults were easy and some were hard. And easy consults usually turned into clients. I realized the point wasn't to put on a show – it was just to see if we're a good fit.

A consult is just another step in the funnel. Not everyone who signs up for a consult will become a client. That doesn't mean anything about you as a coach.

And when you realize that, you can take the pressure off. And if you're feeling nervous, that's normal too. You're likely doing something you've never done before. It will get easier.

A Consult Framework

The point of a consult is to see if you're a good fit, and if you are, to sign a client. There are lots of ways to do a consult. We're going to give you a framework you can follow, but if you remember the point of a consult, you can be flexible.

You can print this out and have it on your desk during a consult, or pull it up on your screen. Use it as a helpful guide to do consults. Keep what works, and leave what doesn't. As you do more consults, you'll naturally find your own flow.

CONSULT FRAMEWORK

Here's how I like to run these calls...

Give them an overview of how the call will go. You can say something like this:

- *Here's how I like to run these calls. I'll ask you some questions to see what's going on, and then I'll let you know what I see, and how I can help. If we think that working together will be a good fit, I can give you the details about what that would look like. Does that sound good?*

What are you hoping I can help you with?

Find out about their present situation. Basically, get their words for what's the problem, so you can get their words for the solution. This also helps you find out what the real problem is.

- *How is this showing up in your life? Why is this a problem?*
- *What other areas of your life are affected by this?*
- *1 – 10 how would you rate [insert life area]? What would a 10 look like? What would need to happen or change for this to be a 10?*

If I could wave a magic wand and fix this, what would it look like?

Find out what result they want from coaching. Also help them to feel into what's possible, and get a vision of how coaching can help.

- *What does _____ look like when it's a 10?*
- *What would be your best case scenario?*

I can definitely help you with this. Here's what I'm seeing...

Show them that your coaching can help. Point out 2 or 3 patterns you've picked up on as they've been talking—things that will make them nod their head and say "oh, she gets me."

- *You've been trying to solve this by changing your plan every week.*
- *You're being really hard on yourself.*
- *Your perfectionism / impostor syndrome is getting in the way.*

Here's what I recommend...

Explain how you can help them get to where they want to be. This could be much more individualized to the client, or you can use this general template:

- *First, we need to increase your awareness of these thoughts. Identify them.*
- *Then, we need to play with them and find thoughts that are more useful and believable.*
- *Then we need to practice them so they become your default thoughts. and then learn to catch them in the moment*

CONSULT FRAMEWORK

Imagine a year from now when this isn't a problem....

Show them how coaching on this issue will impact other areas of their life. Paint the picture of their perfect life, and help them see how coaching will help them get it.

From 1-10, how committed are you to making this happen?

This gives you a chance to address any objections before you make an offer or talk about working together. If they say anything less than a 10, find out why they're not a 10. If they say 10, find out if there's anything that could get in their way.

Based on our conversation, I think this is a great fit. What are your thoughts?

Responses here will vary widely. They might hesitate, they might say no, they might say yes—or all of the above. Here are some ways to approach each of these responses:

YES

Great! Here's what coaching with me looks like...

Explain how your coaching works. Tell them the cost, number of sessions, and any other details they need to know about working with you. Confirm that this sounds good.

NO

Can I ask why not?

You can ask this, or you can simply end the conversation politely. But by asking why not, you can often uncover an objection you might be able to address and solve.

HESITATE

If we could find a way to work together, would you want to?

In many cases you won't get a clear yes or no. This is a way to clarify if they actually want to but can't figure it out (money, time, etc.) or if they're just making excuses. You can also ask if they're open to coaching on this issue.

Thanks! I'll send you an email.

Assuming they've said yes, let them know to expect an email from you (or however you're handling payments and/or calendar invites). Congrats! You just signed a new client. :)

Pro Tips - Consults

You don't have to say yes to everyone. If you don't think it's is a good fit, you can recommend therapy, another coach, or politely tell them you don't think it's a good fit.

Consider letting people know your price beforehand. There are pros and cons to both options. But if you advertise your price (on your Stripe product, in your posts, direct messages, or elsewhere), it can make for a more straightforward consult – since they know how much it will cost up front.

How to Do a Coaching Call (Bonus)

If you're already pretty established in your coaching style, then you probably don't need this resource. But if you're still exploring, you can use this worksheet as a framework running your coaching calls.

Here are some things to remember, to help you feel more confident in your coaching calls.

Understand your value as a coach. In the book *The Prosperous Coach*, they talk about how people can get value from talking to a lamp post. If someone went outside every week and talked to their lamp post they would start to work out their own problems. You are more valuable than a lamp post. Automatically. You can hold space and ask questions. You don't have to solve their problem for them. Just help them find the answers.

Certification isn't required. A lot of new coaches get hung up on the question of whether and how to get certified. Most clients don't care if you're certified, they just want to know if you can help them.

COACHING CALL

How can I help you today?

Find out what to coach on. Sometimes it will be immediately obvious what they want coaching on, and sometimes you'll need to talk before it becomes clear. Here are more questions to ask:

- *Tell me something that's going well, and something that's not going well.*
- *How are you feeling right now? Why?*
- *If I could wave my magic wand and solve something for you, what would it be?*

So the issue is _____. Is this what you want to talk about today?

Once you've explored a bit, it's a good idea to explicitly state the issue they want coaching on. This helps makes sure you're on the same page. It also sometimes helps them realize the problem is different than what they thought.

Why is this a problem?

Now that you've identified the issue, it's time to play! The client usually thinks that the problem is the problem. But it's typically the way they're thinking about the problem. E.g., The problem is not overeating—the problem is what they're thinking before, during, and after overeating. This is where you help them shift their mindset and think about things in a new way. Here are some more questions you can ask:

- *Why? So what?* (Remember, you're asking these to help them keep going lower into their brain, to find out what's actually at the root of the issue.)
- *How do you show up when you believe that?*
- *What would it look like if this weren't a problem? What else is possible?*

Ok, what are your thoughts about this now?

When you feel like you've made some progress, it's a good idea to check in and see where your client is. Sometimes it's easy to think the problem has been solved, because it's clear in your mind. But it might not be clear in their mind yet. If they do feel good about it, and there's time, you can go back and find other issues to coach on. If not, keep coaching.

What are your takeaways?

Wrap up the call in a way that pulls everything together and empowers your client. Identify any key takeaways or homework, and acknowledge the client for the work they've done.

- *How are you feeling now?*
- *What do you want to acknowledge yourself for?*
- *What do you think you need to do this week?*

ROOTING FOR YOU!

You now have everything you need to sign coaching clients. Seriously. Follow the steps in this guide, and do daily thought work, and you will start signing clients.

Don't overthink this and don't delay. Get started right now on the [step-by-step checklist](#). You got this!



You got it, dude.