# The Money Making Checklist

## The 5 Critical Keys Every Start-Up Coach Needs To Start And Build Their Business With Fun & Confidence!

With Business Building Vixens

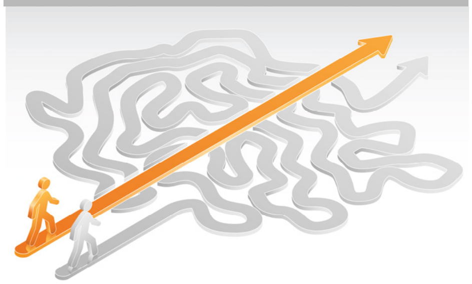
**Melinda Cohan & Kate Steinbacher**

# The Business Building Quest of Every Start-Up Coach

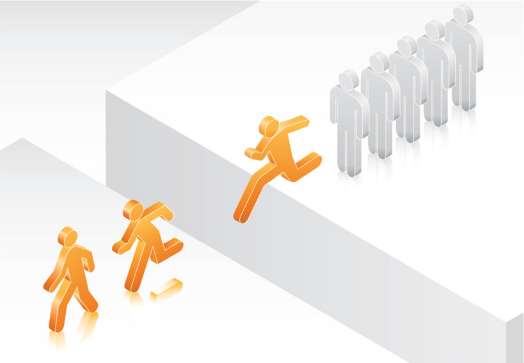
## Did you know that in less than 4 years, over 56% of start-up coaches will no longer be in business?!

### By following this Money Making Checklist, you will:

- **Setup your business** so nothing slips through the cracks.
- **Be 100% confident** that you can deliver what you promise.
- Know the systems required in every coaching business to **get clients and make money!**
- Understand the industry's leading technology and resource to **organize and automate the back-office of your business.**
- **Have fun** setting up and growing your business.



**Many people believe it is because they lack marketing skills or despise selling, but that is not entirely true!**



Over the years of working with coaches to build businesses, we have noticed key factors that make or break a business. Without these, you may end up being part of that 56%.

That is why we have created this Business Building Confidence Kit. It will equip you with exactly what you need to set up your coaching business with confidence; even without having any experience, so nothing slips through the cracks!!!

### The great myth is that just because you're a great coach means you'll make money as a coach.

The truth is, being a great coach is one thing; while running a successful coaching business is something entirely different. Creating and running a successful coaching business allows you to make more money while making a bigger impact.

**It takes very different skills to accomplish each of these aspects of owning a coaching business.**

Your passion for coaching is like the fuel; your business is the vehicle to get you where you want to go! Now that you've studied and polished your skills as a coach, it is essential to master your skills as a business owner. **And we are here to help keep you out of that 56%!**

# The Traditional Path of a Start-Up Coach – Blech!

**Most start-up coaches, like you, go on a venture to turn their passion into profits doing what they love.** And on this quest, they reach a point of overwhelm because they have learned from their schools, mentors and teachers that there is a long list of things they must do in order to be successful.

After having been given the **huge list of everything they need to have** in place to make money as a coach, most **start-up coaches think** this thought:

> *"This is crazy!!!! There is no way I'm wasting my time manually doing ALL OF THAT! How am I going to figure all of this out?!*
>
> *I just want to coach and make money doing it!!!!! I'll go get clients and then figure out what I need to do later.*

## This where the rubber meets the road.
## It's at this point a start-up coach chooses one of three traditional paths:

**a**

**You become a "hobbyist"** and tolerate getting by on coaching by the seat of your pants and accept whatever money you can make in this fashion.

**b**

**You spend countless hours** and time researching HOW to accomplish everything you've been told you must do to run a business and start piece-mealing all the essential elements together; this is usually done through trial and error and is very expensive in both time and money.

**c**

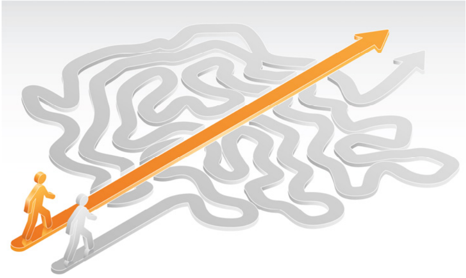
**You give up and stop** because your overwhelm is bigger then your passion in that moment.

**Traditionally, If you really want to do what you love, pursue your passions and make money as a coach, then Option B was only viable option.** This is precisely why over half of all start-up coaches are not in business after 4 years. Any of these three options suck!

And before you realize it, your long list of to-do items causes your passion to fade, overwhelm takes over and resentment kicks in. No thanks! But these three traditional paths are all start-up coaches knew, **until now**.

# The Fierce, Fun & Fabulous Business Building Quest – Ahhh!

To make building your coaching business the easiest, most balanced quest with the greatest return and reward, **the secret hot wish of every coach is to have everything necessary for starting and growing a business in one place.**



This Business Building Quest provides answers to the **4 most common questions** start-up coaches have:

- ? What systems do I need in order to **set up my coaching business** while looking fiercely professional?
- ? How can I **simplify and automate all the tasks** so I don't have to spend countless hours stuck doing things I hate?
- ? What do I have to do so I can **live the lifestyle I desire** while also coaching clients and running a business?
- ? How can I make sure I **make money doing what I love**?

> "*When I first started out I had ONE client. I hired a business image consultant and his advice to me was 'Treat that one client as though they were 100...' you see, I was going to wait until I got more clients before I purchased CC - but after meeting with him, I purchased the [Coaches Console] system that day so I could give my ONE client the BEST experience possible. I set up the auto-responders, the calendar, and forms that my client needed. They were so impressed they referred more people to me.* – Priscilla Hansen

## YOUR QUEST:

**Mindset:** With the right processes, technology and community (support) I can leverage my success to make money quickly and create a steady stream of clients.

**Approach:** Create the processes that allow me to provide superior service to just one client as if they were 100.

**Organization:** Every required element is organized in one streamlined system.

**Automation:** Business systems and process in place are automated from the beginning so I don't waste my time and money on tasks I don't have to do (especially since I don't like doing them anyway).

**Result:** A solid business that provides the confidence and credibility to begin marketing and make money.

# The 5 Critical Keys of The Business Building Quest

This fierce, fun & fabulous business-building quest is centered on the **five core elements of every successful coaching business**; we call them Critical Keys.


**Within each Critical Key is a checklist and the how-to technology to accomplish each element. PLUS experience how your Coaches Console already has each Critical Key Done-4-You!**

# Critical Key #1

## Prospect Pursuit:

### How To Turn "Just Visiting" Into "Let's Do Business"


This Critical Key provides everything you need to engage a visitor on your website and guide them through the 4 action steps that lead to them scheduling a complimentary consultation.

## Workflow for Critical

When engaging the visitor, they will:

1. Experience your educational-based **free report** on your website
2. **Opt in to your contact list** to receive the free report
3. Be invited to **schedule a complementary consultation**
4. Receive the **automated follow-up** series of messages
5. Receive the branded, **automated appointment reminder**

Engaging visitors and prospects through sharing information they deem as valuable is the foundation to enrolling versus selling. The reason **most start-up coaches struggle with engaging and converting prospects** is that the most common follow-up strategy a start-up coach uses is to say something like "***I just wanted to touch base to see if you have any questions. I'm here, just let me know***." Or they don't follow up because they think this thought "***Well he knows how to get in touch with me if he is interested in coaching. He'll call when he is ready***."

**BLECH! No wonder most start-up coaches don't like to follow-up.**

**The effective way to follow up is through offering a free report on your website that allows prospects to opt-in thereby growing your mailing list and automating your follow up.**

# Critical Key #1


## Checklist Elements for Automation

- **Website** with educational based content
- **Opt-In Form** to give away free report and grow mailing list
- Opt-In **Autoresponder** Email Series to deliver free report and 'drip' other educational-based information
- **Online Calendar** to schedule sample sessions
- Automated, Branded **Appointment Reminder** delivered to the prospect prior to the sample session.

## Without These Required Automation Elements:

- Prospects will slip through the cracks requiring you to work harder to locate new potential clients.
- Follow up will be sparse, sporadic and inconsistent (if it even exists at all).
- Follow up will leave you feeling like a nag with little results.

## Critical Key #1 Hot Tip: Create Automated Follow Up

**A common mistake start-up coaches make is they attempt to follow up manually using their inbox, calendar, post-it notes or scribbles. (or worse, their memory)**

This lack of professionalism may not directly be seen by your prospects or clients, but will leave you scrambling behind the scenes to make sure nothing slips through the cracks. Integrate these automated elements so they "talk to each other" and you create an experience that is professional for your prospects and simple for you. Set yourself up for success right from the beginning!


# Critical Key #1

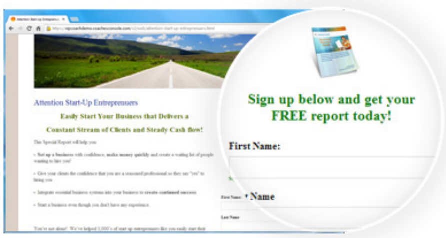
## Your Done-4-You Coaches Console In Action

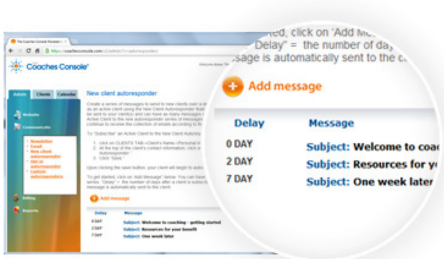
In your Coaches Console system, we have stocked each of these elements with templates and samples for you to experience and customize for your clients.

**Log in to your Coaches Console account and check these fun things out:**

### Opt-In Form to give away free report and grow mailing list

Experience how **your website displays a free sample report** with an opt-in form that would make it easy for prospects to opt-in to your mailing list.
➔Click on ADMIN TAB->Website->Preview Website.

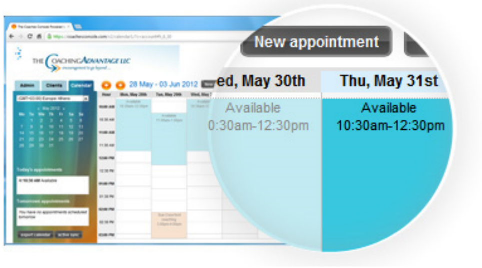



### Opt-In Autoresponder Email Series to deliver free report and 'drip' other educational-based information

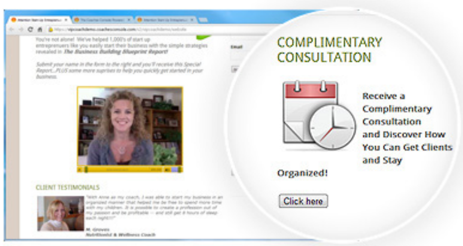
Check out the **Opt-In Autoresponder** to view the 5 email message templates you can "drip" to your prospects over time as a way to keep them engaged. ➔Click on ADMIN TAB->COMMUNICATE->OPT-IN AUTORESPONDER.

### Online Calendar to schedule sample sessions




Review how you can set up **blocks of available time** in advance with your online calendar so visitors and prospects only have access to pre-defined times on your calendar. ➔Click CALENDAR TAB->NEW APPOINTMENT->Schedule Block of Available Time.

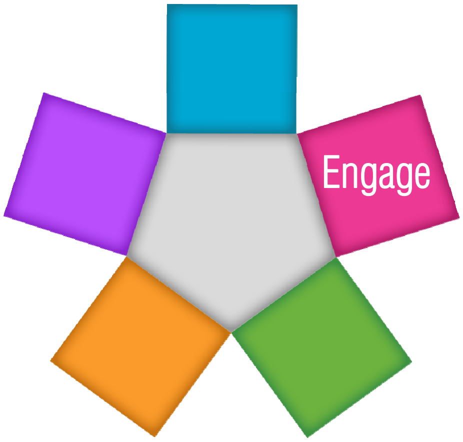
Experience how a client would **book a sample session** from your website. ➔Click on ADMIN TAB->WEBSITE->PREVIEW WEBSITE->Schedule Complimentary Consultation and "Click Here" button.



# Critical Key #2

## Problem Meet Solution:

### Instant Professionalism & Credibility




This Critical Key provides you with everything you need to be professional and convey credibility as you enroll prospects through your Sample Session Consultation.

## Workflow for Critical Key #2

When enrolling the prospect, you will:

1. **Record prospect notes** in client log for relationship building
2. **Record follow-up** actions recorded using automated to-do list
3. Enter sample session observations, notes and overview entered into **organized notes section** for accountability
4. Send the Post-Session Recap form **as accountability follow-up**

These elements convey that you have a solid, professional business backing up the services you deliver.

Engaging and supporting your prospects before the sample session even begins and following the sample session, wow's your prospects quickly and deepens the know-like-trust factor!

When they know you, like you and trust you, they hire you, rehire you and refer you.

**Simple organization and automation elements can increase your professionalism even before you have your first sample session.**

# Critical Key #2


## Required Elements for Automation:

- **CRM System** to organize prospects, groups and notes from sample session
- **To-do list** with automated reminders
- **Private Client Website** for prospects to access an online interactive Post-Session Recap form

## Without conveying professionalism and credibility in your sample sessions:

- Prospects may not perceive that you are a true professional and will fiercely be able to guide them to accomplish their goals and overcome their challenges.
- Buying decisions may be slow and hesitant because prospects are uncertain and lack confidence you will follow through and deliver a return on their investment.
- Key follow-up actions slip through the cracks decreasing the chances a prospect saying ‘yes’ to hiring you as their coach.

## Critical Key #2 Hot Tip:

**A common mistake start-up coaches make is they simply show up** at the time of the sample session and believe that if they are present, listen and apply their coaching skills that they will ‘wow’ their prospects. While this is true, there are many other elements that must be in place for professionalism to be present.

Otherwise you are simply a great coach offering great services. People hire you not just because you are a great coach. **People hire you because you convey professionalism.** Be thorough in the facilitating of your sample sessions and have automated follow up systems in place and your prospects will have the confidence to invest in your services.

# Critical Key #2


## Check Out Coaches Console In Action

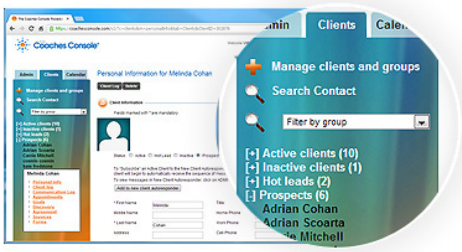
In your Coaches Console system, we have stocked each of these elements with templates and samples for you to experience and customize for your clients.

**Log in to your Coaches Console account and check these fun things out:**

**CRM System to organize prospect notes for relationship building**

Check out how your system organizes your contacts so you can quickly access prospects or groups for easy communication and follow up.

➔Click on CLIENTS TAB and "Add Group" and "Add New Contact" to experience the different ways you can organize your contact list. ➔Click on CLIENTS TAB-Contact Name->CLIENT LOG so you can see where to easily save your notes from a sample session for easy reference.



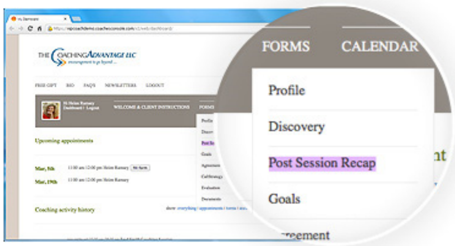


**To-do list with automated reminders**

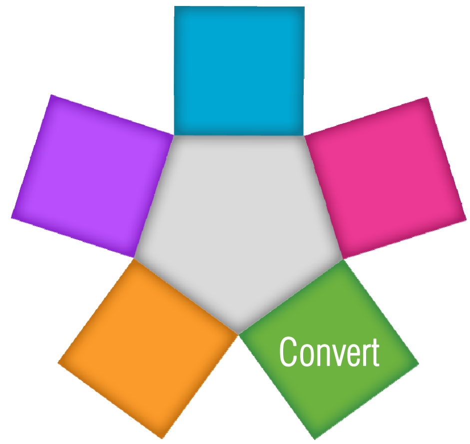
➔Click on To-Do List and review simple follow up actions to be taken following a sample session. These tasks include automated reminders so nothing slips through the cracks.

**Private Client Website for prospects to access online, interactive Post-Session recap form**

Review the pre-uploaded post-session recap form on your website for your prospects and clients to complete. ➔Click on ADMIN->WEBSITE->FORMS, then click the preview icon to see the form in your system.



# Critical Key #3




## Getting Paid & Creating Consistent Income

This Critical Key provides you with everything you need to easily engage hot leads into taking action and buying your services.

## Workflow for Critical Key #3

When prospects say YES to your services:

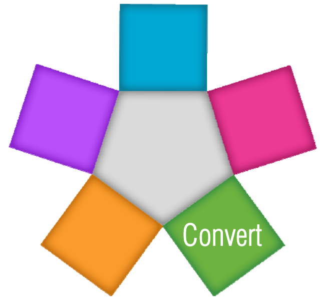
1. New client is presented with **coaching agreement**
2. **Payment for services**, products or programs is processed
3. **Receipt** for services is sent to new client
4. **New Client autoresponder** sent to client to engage them in your welcome packet
5. **Schedule Initial Coaching Session**

This series of steps makes up what we call “the most important nanosecond” of your business.
When you have the technology in place to simplify and automate these steps from the moment a prospect says “yes,” things run smoothly and effortlessly.

When these elements are not present in your business this ‘nanosecond’ becomes the biggest Grand Canyon in your business and becomes the cause for great frustration, fear, overwhelm and not getting paid.

**When you have the technology in place to simplify and automated these steps, things run smoothly and effortlessly. Your money gremlins remain in their cave and all is fun!**

# Critical Key #3




## Required Elements for Automation:

- **Online client agreement;** ability for client to accept the terms of your coaching agreement
- **Merchant account or Paypal** for automated payment processing
- **Shopping cart** to sell packages, services and products online
- **Custom Autoresponder** to deliver Welcome Packet, content and curriculum.

## Without having simple elements in place to easily accept payments from prospects when they say 'yes' to your services you get:

- Clients who actually have already said yes to your services slip through the cracks and never engage in your services – this is the Grand Canyon mistake many start-up coaches make.
- Your money gremlins create roller-coaster income in your business
- Increased stress over not having enough money to pay your bills and invest in marketing
- You shy away from charging what you are worth due to lack of consistency in engaging your clients

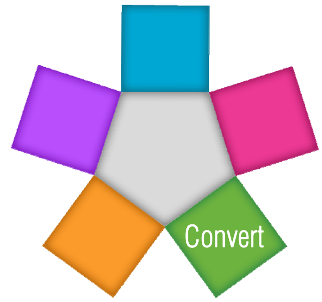
## Critical Key #3 Hot Tip:

**Automate the payment processing solution.** Once your client makes their buying decision and has said "yes" to your coaching services, don't make them keep making that buying decision over and over each month when they have to mail in a check or post their own payment.

Each time they pull out their credit card or write the check it leaves space for them to doubt their investment. Automating the payment processing makes it easier for your clients and places the money in your bank account more quickly.

## Critical Key #3 Hot Tip:

**Don't offer a multitude of payment options.** The clearer you are in how you want clients to pay, the easier and simpler it is for them to say yes and pay for your services. Identify what makes sense for YOU and teach your prospects and clients that is the best practices for your business.




# Critical Key #3

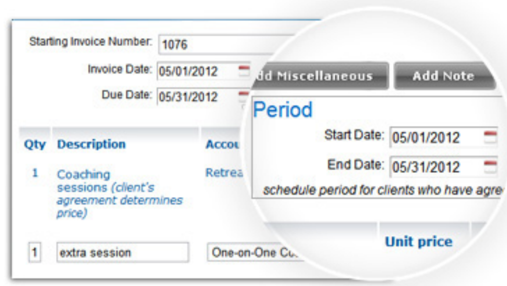
## Check Out Coaches Console In Action

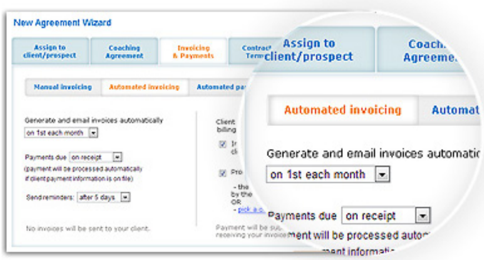
In your Coaches Console system, we have stocked each of these elements with templates and samples for you to experience and customize for your clients.

**Log in to your Coaches Console account and check these fun things out:**

### Create invoices for your services

Experience the 4 simple steps to create a professional invoice that is sent to your clients.
➔Click on ADMIN->BILLING->CREATE INVOICE and follow the prompts.




### Online client agreement

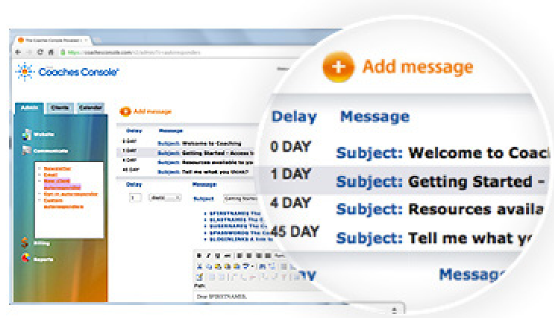
Review the pre-uploaded coaching agreements by clicking on the ➔CLIENTS TAB->CLIENT NAME->AGREEMENT. You can also create multiple agreement templates to pre-upload into your system.

### Accept online payments and automate payment processing

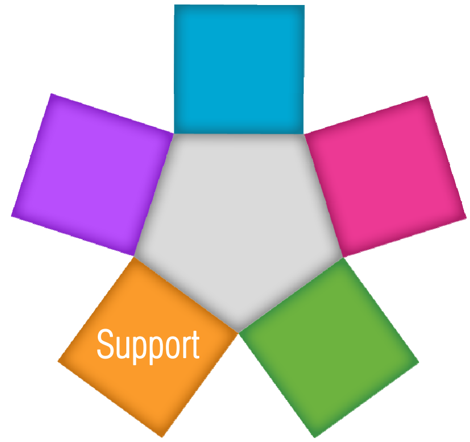

Check out the various e-commerce integration options.
➔Click on ADMIN->BILLING->SETTINGS and find the best option for your business.

### New client autoresponder

Review the automated messages you can create to quickly engage clients when they begin their coaching agreement.
➔Click on ADMIN->COMMUNICATE->New Client Autoresponder.



# Critical Key #4




## Exquisite Client Support:

### Be 100% confident you can deliver what you promise

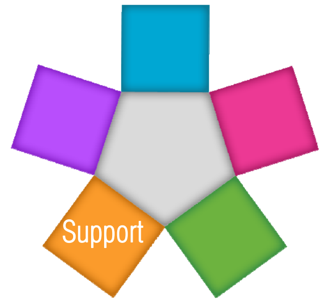
This Critical Key provides you with everything you need to engage your clients and make you more effective as a coach. These elements allow you to implement a powerful system so nothing slips through the cracks. This Critical Key is the key for keeping you organized so you can focus on your clients and make more money!

## Workflow for Critical Key #4

Supporting your clients before, during, after and in-between the coaching session:

1. The Client accesses the secure, Private Client Website to **schedule sessions, complete The Welcome Packet and submit custom forms.**
2. The Client receives automated appointment reminder and **submits answers** to the Call Strategy form **online**.
3. The Coach **enters session notes and sends an accountability follow-up email.**
4. The Private Discussion Log is utilized by both the Coach & Client for **coaching in-between sessions**.
5. **Additional Resources** accessible to client within the Private Client Website
6. Content and curriculum is **automatically "dripped"** to the client **over time.**

# Critical Key #4




**Most coaches think that coaching a client simply means showing up for the session** and being present. While this is good enough to get by, this keeps you playing small with minimal results in your business – fewer clients, less money, less time. For a successful coach, engaging a client starts in advance of the session and continues through until the next time you meet. We call this the "Optimal Coaching Experience." You have to educate your clients how to have the entire, optimal coaching experience! It is up to you to outline each step along the way.

**Automating this part of your business is the key to professionalism.**

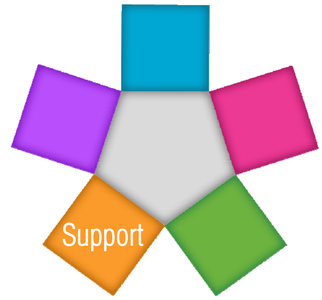
## Required Elements for Automation:

- **Private client website**
- **Permission-based** web-pages, forms and documents
- **Online calendar**
- Interactive **online forms**
- Note taking & Client/Coach Private **Discussion Log**

## Critical Key #4 Hot Tip:

**Dripping content is an easy way to engage clients** as well as extend coaching agreements and educates your clients.

Using custom autoresponder messages, you can deliver specific resources, information and action items for your clients that deepen their coaching experience and allow them to realize their return on the investment of your coaching services.

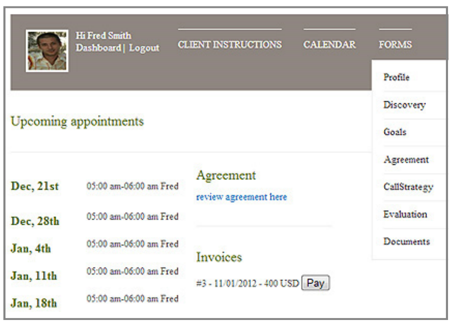



# Critical Key #4

## Check Out Coaches Console In Action

In your Coaches Console system, we have stocked each of these elements with templates and samples for you to experience and customize for your clients.

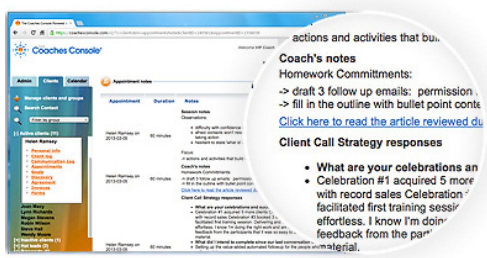
**Log in to your Coaches Console account and check these fun things out:**



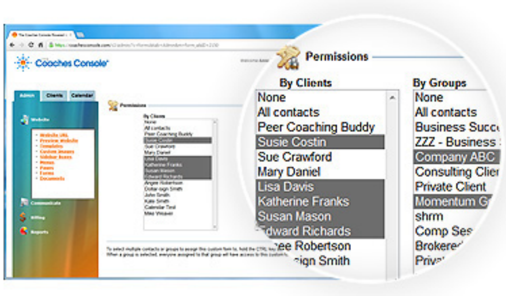

### Client Dashboard

Take a look the organized dashboard that greets your clients when they log in to their Private Client Website.
➔Click CLIENTS TAB->CLIENT NAME->PERSONAL INFO->Log In As {Client Name} button.

### Note taking & Client/Coach Discussion Log



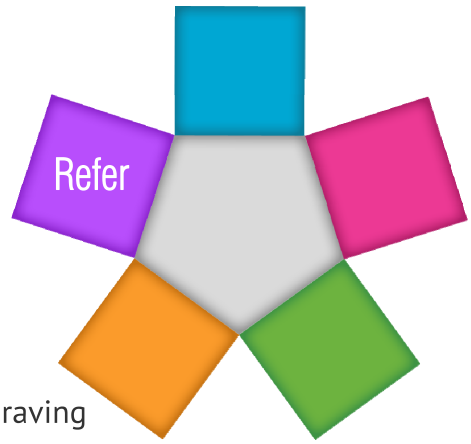

Experience how you can organize your notes in one central place. ➔Click on CLIENTS TAB->CLIENT NAME->APPOINTMENTS->TAKE NOTES. Here you'll be able to review Call Strategy Form answers, post your private notes and send session follow-up notes for accountability.
Review how easy it is to post a comment, question or share a resource to a client using the Client Log feature. ➔Click on CLIENTS TAB->CLIENT NAME->CLIENT LOG and type in your comment. You can even upload a document for a client to review as well.




### Permission-based web-pages, forms and documents

Check out how you can mark a form as private so only a specific group can access that form.
➔Click on ADMIN ->WEBSITE->FORMS then click the edit icon to the right of the Goals form. At the bottom of the form you'll see the option to mark the form as private and when selected you'll be prompted to choose the group(s) that you want to have access to this form.

# Critical Key #5




## Hidden Client Sources:

### How to create a Personal Referral Engine for a steady stream of new clients

This Critical Key provides you everything you need to turn clients into raving fans, automate the process of asking for referrals and teaching others how to refer you.
These elements allow you to discover new clients you didn't even know existed.

## Workflow for Critical Key #5

1. Mid-way through the coaching process, the client is taken through a series of questions that make up the Testimonial Form
2. These responses are collected within the Testimonial form on a coach's private client website.
3. The client is prompted in an automated email message to complete the Referral Form
4. Refer-a-friend email message template is shared with the existing client to pass on to their referral.
5. The coach receives the notification when the referral form has been completed and can contact the referral.

Many coaches approach this stage with the mindset of "if the client benefited, then they'll refer me to their friends and colleagues. I don't need to ask." Therefore, most coaches don't get referrals because they don't ask. They simply "wait" for their clients to pass them a referral.
**Through a simple set of automated questions, you can turn the referral asking process into a way that shows your client how far they have come on their journey.** This allows them to easily articulate the benefits of coaching so they can connect their friends and family to your services.

**...most coaches don't get referrals because they don't ask.**

# Critical Key #5


## Required Elements for Automation

- Interactive online forms
- Testimonial Form
- Referral Form
- Recording software to capture audio or video testimonials
- Email templates accessible by clients

## Without automating the referral process:

- You spend twice as much time and money on finding new clients; making marketing harder than necessary.
- The right people do not know about you and how you can help them.
- You settle for the wrong type of client just so you can coach and make money

## Critical Key #5 Hot Tip:

**Writing a testimonial is often a daunting task for your clients** –not because they don’t care, but because they don’t know how to put their appreciation into words.

A testimonial form is an easy way to guide a client through answering a few simple and heart felt questions.

The collection of answers then becomes your testimonial!

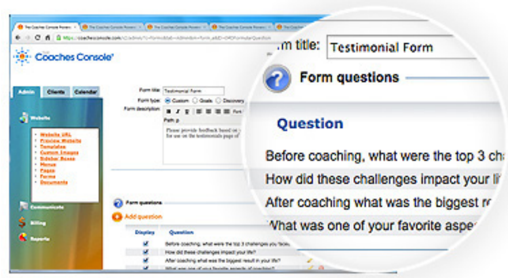

# Critical Key #5

## Check Out Coaches Console In Action

In your Coaches Console system, we have stocked each of these elements with templates and samples for you to experience and customize for your clients.

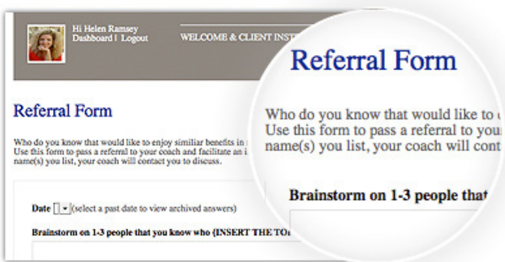
**Log in to your Coaches Console account and check these fun things out:**

### Testimonial Form



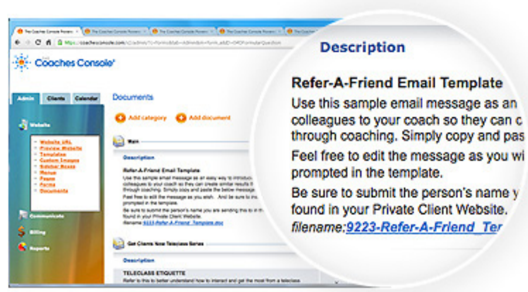

Review the pre-uploaded Testimonial form you can use with your clients.
➔Click on the ADMIN TAB->WEBSITE->FORMS and click the preview icon to the right of the Testimonial Form.

### Referral Form




Check out the referral form used to automate the referral asking process.
➔Click on ADMIN TAB->WEBSITE->FORMS and click on the 'Preview" icon to review the REFERRAL FORM

### Email Templates accessible by clients




Preview the sample email template you can provide to your clients to make it easy for them to introduce you to new clients.
➔Click on ADMIN TAB->WEBSITE->DOCUMENTS and read the sample email template document that can easily be emailed to your clients at any point during your coaching agreement.

# What You Just Learned

**Choosing the traditional approach to building your business is grueling.**

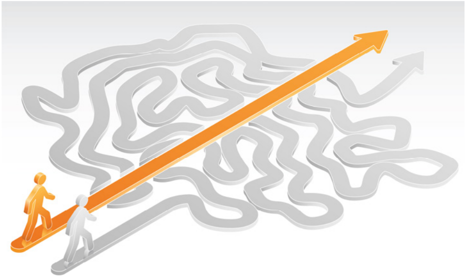
You spend countless hours and time researching HOW to accomplish everything you've been told you must do to run your business and make money as a coach. This is expensive in both time and money!

## Embark on the fierce, fun & fabulous quest so you can:

- **Setup your business** so nothing slips through the cracks
- Be **100% confident** that you can deliver what you promise
- Know the systems required in every coaching business to **create consistent clients and cash flow!**
- Understand the industry's leading technology and resource to **organize and automate the back-office of your business**
- **Have fun** setting and growing your business

## The Coaches Console makes your back end sexy

### (the back end of your business that is)!



We know business administration isn't where you want to spend your time. In fact we find it to be extremely sexy, hot and sassy and that is why we are here. Through our technology and community, your burdens and distractions of starting and building your business are eliminated.

**Are you ready for a kick-ass system to start your business knowing nothing will slip through the cracks?**

# Your Next Step

## in Your Business Building Quest To Get Clients and Make Money:

Organize your marketing, online scheduling, client management, product sales & courses from the industry's leading, all-inclusive application.

- Contact List
- Online Calendar
- Public Website Module
- Private Client Website Module
- Course & Content Delivery Module
- Marketing & Communication Module
- Invoicing & Client Agreement Module
- Client Data Module
- Shopping Cart Module
- Autoresponder Module
- Participant Activity Tracking
- Unlimited Products & Courses
- BONUS: A course of your very own for lead generation or to sell online.

Now You Can Reach Online Buyers Through Your Console Shopping Cart

Don't do it alone....
We look forward to supporting you in your fierce, fun & fabulous quest to building your business!

MWAH!

With Pleasure,

**Melinda Cohan & Kate Steinbacher**

Business Building Vixens