



# COACHING

## CONFIDENTIAL

Week Three:



Making the Sale  
part 3

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# IMPORTANT:

Taking on a new client or customer is probably the most exciting experience in the world for you both!

It's **a journey you will be taking together** and there will be a lot of joy, emotions, and learning to expand upon.

It's where you get to shine and really give your client a lasting experience.

# Module Overview:



In this workbook, we'll cover:

- 📌 On boarding clients
  - 📌 Boundaries
  - 📌 Session structures
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# TAKE NOTE:

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You want to start off professionally and responsibility.

The client has just made an investment (energetically and financially) and they are probably feeling all the feels (joy, anticipation, excitement and yes, even a little fear and doubt).

Let the transition be one of **grace and of ease.**

# Exercise:

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So they've paid you, now what?

# Onboarding

## Take care of the little things.

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Once your new client has made their payment, you can either automate or send an email directly to them.

In your email, **highlight your excitement and honor** in what you'll be embarking on together. From there, lead into what you need from them and the direction they need to take.

### This may include:

- + How to **schedule sessions** with you (indicate if they should schedule all at once or if there will be a re-occurring time slot)
- + **Signing the contract** (make sure you have this before you begin your first interaction!), use the sample contract and adapt to your business model.
- + **Insight form**/Questionnaire.
- + Home **address**. Perhaps you're sending them a little welcome gift!
- + Obtaining a set **notebook/journal**

Your insight form is made up of questions or things you'd like to know before you begin your work together.

**It's helpful to have a little background so you aren't spending most of your 1st session digging for details** they could've given ahead of time.

When creating your insight form, don't over think it! Use the questionnaire you sent me from the Home page as a guide for your own.

# Example Email:

Hi [FIRST NAME GOES HERE]!

Welcome, welcome, welcome! I could not be more excited to start this incredible journey with you. Before we begin our sessions together, I've got a few questions for you to dig into.

Make sure that over the next couple of days, you set aside some time to answer the attached insight form in an environment that is relaxing, pleasant and allows you to be 100% focused on you. The questions are meant to empower you to think clearly and become intentional with your goals as we begin this next chapter together.

As move through each section of prompts, think about what you want, what limitations you're currently dealing with, and how you desire to move forward after meeting your target expectations.

[Click here to get started.](#)

Once you've fill out the questionnaire and are ready to start your sessions, you can use the link below to access my calendar and book our first session together. Give yourself a 10 minute window on each end, as sometimes we'll spend a few extra minutes together.

Please note: if you ever have an issue finding a mutually convenient time, just let me know and I'll open up something for us!

[Click here to book your first 50 Minute Session.](#)

Next, kindly review and sign the contract outlining our time together. Please have this returned to me before the start of our first session.

If you have any questions or concerns, please reply to this email and let me know. I'm looking forward our coaching experience together and guiding you into the heart of your dreams!

Best,  
{you}

P.S. As a part of your package, you'll get complimentary access to my monthly membership program. [Click here to sign in and browse all the goodies in store for you!](#)



# ACTION:

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Draft up a version of what you'd like your welcome email to be.

## **Put yourself on the receiving end.**

What would you LOVE to read after saying yes to the incredible commitment of working with you?

# Exercise:

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## Contracts & Scheduling

# Contracts

## Are you legal?

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It is very important that you have a binding document outlining the entirety of your time together.

I've included a sample contract for coaches, however if you create your own, you must include the following:

- Conditions around services provided
- Creditability to facilitate services
- Agreed price point and exchange of time/services
- Rescheduling/Cancellation policy

**Do not begin any sessions (even if they've paid) until the contract is signed.**

It can be an actual signed and scanned signature or email consent.

Legally, either are binding as confirmation to the agreed conditions and services.

I have provided a contract you can use and adjust in the swipe files of this module!

# Scheduling

**Hand it over to the client.**

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I believe it's important for the clients to schedule their own sessions. This is part of their journey of taking ownership of their transformation and wanting it enough to do it themselves. It sounds like a simple task, however **it's not your role!**

Same for having them come to you at the time of the session. Unless in a pre-determined office setting, they should initiate the call or Skype.

## **Rescheduling/Cancelling.**

Typically, a client should understand they are responsible for rescheduling and cancelling their sessions by the set time frame you've dictated. Unless a health or family emergency arises, it is under your digression if they cancel last minute how you want to proceed, however it is standard that they will have to pay for it.

If they completely no show, send a correspondence about 5 minutes into the call time and follow up with another email after. It's likely they'll respond and you can work to reschedule.

There may be times where you are the one that has to cancel or reschedule due to an emergency or health issue.

You do not need to overshare personal details, however you want to be upfront and considerate.

**Give as much time up front as possible** out of respect for your client.

# Example Email

## Cancel/Reschedule

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Hi {first name},

Trusting your week is going well!

Due to an unforeseen circumstance, I regretfully need to reschedule our session \_\_\_\_\_. You may book a new appointment via my calendar or let me know if \_\_\_\_\_ (suggest a new date) would work. (you want to be a little more flexible since you are the one rearranging).

My apologies for any inconvenience and I appreciate your understanding! In the meantime, I would love an update on \_\_\_\_\_ (anything you've been working on together or something they are being held accountable to).

Thank you!

Best,  
{you}



# Action Step:

Create a **template/canned response email** that you can plug into for all of your on boarding and scheduling needs.

This will make it easier to **stay on top of emails**, even when you've got all the feels and loads on your schedule.

# Exercise:

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## Setting Boundaries

# Boundaries

## Honor your space.

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One of the biggest components of a successful business or coaching relationship is **setting boundaries and further, keeping them!**

You want to think about how often a person can reach out to you and time frame for responding to emails, etc. If you want an add-on service such as texting or emergency calls, **how available will you be?**

You want to **honor your space** and show up for yourself first, so you can show up for everyone you serve!

The service you are providing is a container that holds the qualities of what you provide.

### When thinking about boundaries:

What notions and rules do you need to foster to facilitate the ultimate experience for your client or service?

Grab your journal and make a list of every single one.

Implement these boundaries/regulations by plugging them into your contract and discuss them with your client during your first session. Have them repeat it back or affirm they understand the conditions.



Setting the tone early on creates structure and also **prevents drama or misunderstandings** in the future.

It also keeps you from burn-out or holding resentment.



AFFIRM:

When boundaries are in place, I  
hold the **ultimate space!**

# Spotlight:

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## Session Structure

# Leading Sessions

## One way of many...

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You may have your style when it comes to working with clients one on one and I want you to honor such!

Use this template as a guide as you wish and adapt accordingly!

Typically, the desire of a coaching session is to **give an individual a shift in perspective.**

You are likely not spending the hour dishing out advice or telling them what to do, instead you are asking questions and holding space for them to realize their blocks.

It is so much more powerful this way!

When a person can become aware of what's holding them back, you can work with them to **understand how they can move forward** from that place.

Let your sessions be a blend of creative brainstorming, providing tools, listening, and holding them accountable for how they wish to proceed.

### Remember:

The best teachers listen for  
the greatness already within  
you

# Session Breakdown

## Setting the container

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Before any session, I always **center in with my client**. This may be a few moments of breath work or sitting in silence. I also like to create the experience of making the container for our session. Releasing any outside distractions and allowing them to be present for the time at hand. I usually take 3 minutes and no more than 5 minutes.

### Sample meditation:

Let's take a moment to center in for our session today.

Close your eyes and place your hands on your lap, palms open, in a space to receive. Roll your shoulders back and let them hang down, opening up your heart.

Eyes are closed, gaze is upward, and begin to deepen the breath by inhaling in through the nose and letting your body expand with this life giving air.

When you feel ready gently exhale, releasing with the breathe anything that doesn't serve you here and now.

Keep breathing in and out in this fashion... becoming more centered, more focused, more present to the here and now.... letting go of anything you don't need...

Continue this cycle of breath. (pause and let them focus on their breath for a few beats)

At this time let's call upon your intention for this experience today. **What brought you here and what is your deepest objective?**

Center into this intention. Allow yourself to feel it... to connect deeper to it... Bring in a sense of gratitude... for the tools and connections that brought us together today... and for yourself. For showing up, for being open, for being of service.

Take a deep breath in and hold it. Suspend the energy. And release.

And when you're ready, open your eyes and let me know.

# Session Structure

## Post meditation:

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Take a moment for them to come back and ask how that felt for them.

### Set the intention:

Ask them what the intention was they had during the meditation.

Follow with, based on that intention, how would they like to feel by the end of your session today?

This gives you a basis for your tone and objective of your session.

### Next:

Refer to the insight or questionnaire form they provided to you earlier. Look over the goals they had listed.

Ask about how relevant the goals feel to them today and which they would like to focus on first. Notice how it relates to the intention they provide.

Ask any background questions around their goal that would be helpful for you.

You want to feel fully in, that you **understand the history of this desire and what it means to them.**

# Session Pt 2:

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## Crafting the Goal

# AIM SMART

A great tool for establishing goals with your clients is AIM SMART, a technique I learned from my coaching school, the Institute for Professional Excellence in Coaching (aka iPEC) outlined below.

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## **A = Absolute minimum**

What is the Absolute minimum baby step you can take, the one thing that, if you accomplished it in the next 1-14 days, would give you progress toward accomplishing your goal?

## **I = Ideal**

What are the Ideal, knock it out of the park, I'm a rock star steps you can take, everything you can think of and more that, if you accomplished it in the next 1-14 days, would give you progress toward accomplishing your goal?

## **M = Middle**

OK, those are two extremes, so really, what's the Middle?

What are the steps you think you can actually accomplish in the next 1-14 days that would give you progress toward accomplishing your goal?

Then once you have the steps you want to accomplish in the next few days from the AIM tool, you can make them actionable using the SMART tool.

# AIM SMART

## SMART

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### **S = Specific**

What is it, specifically, that **you are going to accomplish**? This may be a duplicate of M, and sometimes you need to refine M just a bit. The goal must be stated in a way that is clear and easily understood.

What do I want to accomplish?  
Specific reasons, purpose or benefits of accomplishing the goal.  
Who is involved?  
Identify a location.  
Identify requirements and constraints.

### **M = Measurable**

Having clear ways to measure your progress to accomplishing the goal you've set allows you to easily see if you're on track or need a course correction. And, more fun, it lets you put a check mark beside or draw a line through the item once you've completed it!

How will you know you've been successful?  
What does successful look like?  
How will you know when you're done?  
How are you going to measure your progress to accomplishing the goal you've set?

### **A = Achievable**

How realistic is it that you can actually achieve this goal? Stretch goals are great, unattainable goals only set you up for failure, goals too easily attained are less significant.

Can this goal be achieved in the time-frame determined?  
How can this goal be accomplished?  
How can you help hold them accountable?

# AIM SMART

## SMART:

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### R = Relevant

Is this goal relevant and aligned to your dream/vision? By having relevant goals, you and those participating in the goals have purpose and are more likely to continue progress when obstacles occur.

Does this goal seem worthwhile?

Is this the right time?

Does this match our other efforts/needs?

Are you the right person to accomplish the goal?

### T = Timely

By having a deadline you create a framework that enables progress to be measured, course corrections to be made, and accomplishments to be celebrated. It is so easy to allow the daily fires or minutia to take up our time and before we realize it, we have missed the opportunity. Setting a deadline gives a sense urgency.

When is the deadline?

What can I do in the next two weeks?

What can I do today?

By implementing the AIM SMART tool you can more easily have intentional steps toward the achievement of your dreams.

They aren't just "great ideas" that they'll accomplish "someday." They are actionable steps your client can make progress on each day. And **before you know it, their goal has been reached! Woo!**

# Session Pt 3:

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## Blocks/Limitations

# Working through blocks

I'd love to say that the AIM SMART is all you need, however most of the time of your session may be focused on **what is getting in the way**. These are usually known as **“Limiting Beliefs”**.

Along with your client, take some time to identify the limiting beliefs your client may be having. It's typically the thoughts that replay in their mind or are triggered by a specific situation.

NOTE: This can also be a GREAT homework exercise for them.

## **Pick ONE limiting belief to work on at a time.**

Which one seems to cause them the most stress or pain?

Discuss why they believe it to be true.

Ask questions about where it came from, who in their life also supports this limitation, what it feels like.

Where does it get reinforced the most?

## **Start to disprove this belief.**

What would happen if the fear or limitation actually happened? Are there examples where this has been false?

Write out all examples (again can be for homework).

## **Find a way to reframe the negative belief with a positive statement.**

How can this be turned around?

How can they catch themselves from thinking this way in the future?

Understand that they may have an a-ha moment or it will be a longer process of undoing.

# Session Closing

## Closing the container

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**Enforce patience** with the whole process and emphasize that it will take a little time however the awareness will speed up it's progress!

### **Closing the session and establish next steps:**

It's important to recap the session and be clear on next steps. Make sure you allow enough time at the end for this!

You want to incorporate the intention, goal setting, and limiting belief work. You can go along the lines of:

Based on what we discussed today, do you have a clear direction for how to move forward?

Have them elaborate further.

Plot out what their homework will be and how you will hold them accountable.

Also have set in place when you will be speaking again.

End on a fun, empowering, high vibe note!

**Your client will be so grateful for you and you will end the call feeling over the moon!**



AFFIRM:

When my sessions have structure  
and meaning, my clients maximize  
their **growth and potential!**