INSTANT RESULTS, LIFELONG CLIENTS TOOLKIT

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TABLE OF CONTENTS

INTRODUCTION

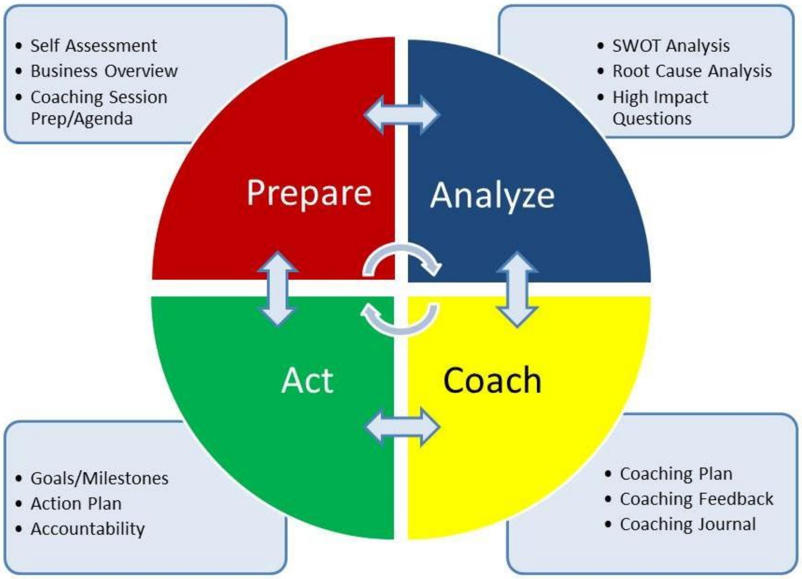
Whether you're just starting out as a spiritual entrepreneur or coach, or you've already been coaching people for a while, having a set of tools can make a huge difference in your effectiveness.

In this manual, you'll get a set of tools that cover each step of the coaching process – from initial preparation and meetings to final action plans.

The tools you'll learn to use are as follows, all of which are included in the Appendix of this manual:

- Self-Assessment Worksheet
- Business Overview Worksheet
- Coaching Session Preparation Worksheet
- Individual Coaching Plan Template
- Coaching Feedback Worksheet
- Coaching Session Agenda Template
- SWOT Analysis Matrix
- Root Cause Analysis Worksheet
- High-impact Questions Worksheet
- Goal and Action Plan Template
- Coaching Journal
- Accountability Checklist

The graphic below shows you how each tool can be used to accomplish the goals of each part of the coaching process.



Before you start using the tools, go through each chapter of the manual to understand the importance of each step of the coaching process and how you can use the tools for success.

You don't have to use all the worksheets included in this toolkit. Pick and choose what you need. Your focus should always be on the success of your client, and with that attitude you can't go wrong.

WHAT YOUR CLIENT NEEDS TO DO BEFORE YOUR FIRST COACHING SESSION

To make the most out of your coaching sessions with clients, it's important for them to perform an honest self-assessment before they even have their first session. They can't just walk in empty-handed or you'll waste time with basic questions. This is a bit of 'homework' they need to do in advance. In order to do a self-assessment, they need to ask themselves some questions about their business, their abilities and the coaching session itself.

SELF ASSESSMENT

Goals

Your clients need to define their goals, both personal and professional. What do they expect to walk away with from the session? Once goals are defined, you can create clear expectations so that they can move forward and you can determine the best ways to help them.

Challenges

If a client comes to you for coaching, there's surely some obstacle they're trying to overcome. Their assessment needs to clearly identify that obstacle that's holding them back so that you both know what to focus on. If the obstacle isn't obvious at first, you'll be able to help them identify it in your sessions.

Strengths and Weaknesses

Your client should think about and identify their strengths. What do they have going for them right now? What areas of their business are going well? What are they particularly skilled at? They should explain what kind of progress they've been making against current goals and obstacles.

Likewise, clients need to share with you the weaknesses in themselves and their business. Identifying areas where they're struggling or have failed at in the past gives you a clear idea of where to focus attention. Where there's a skill lacking or an overwhelming obstacle, it could mean a need to improve or a reason to shift direction.

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How to Move Forward

Ask your client to brainstorm several ideas or identify one central idea they have for going forward. They will then bounce this idea off of you in your sessions and you'll use your expertise and experience to help them decide whether it's an appropriate choice or not. Sure, you'll brainstorm more ideas during your sessions, but getting your client's thought process started will make your time together more productive.

Learning Style

You want to determine the best learning style for your clients since everyone is different. Some like to be challenged regularly. Others prefer being provided one step at a time. Find out how the work best, the you can design your sessions to support them..

Questions

If your clients have questions pertaining to your coaching sessions, have them prepare these before the first session. Have them think about their top 3 questions so that you can address the most important issues first.

BUSINESS OVERVIEW

In addition to their self-assessment, your coaching clients also need to give you a brief overview of their situation. For example, for business coaching, this would include their Divine target market, their competitors, their Unique Selling Proposition, data about revenue, costs, and so on. You need to know all of this before you can really help them, and spending time on details like these in your first session is not a good use of your time together. Or it may be exactly where you need to being with them to get this nailed down.

At your initial pre-coaching session or the initial contact you have with a client, give them the Self-Assessment and the Business Overview worksheets and ask them to fill them out before you meet. Ask them to submit the worksheets to you before the first session so that you have time to review the information.

Even though they may be eager to start soon, give your clients plenty of time to think through the questions on the pre-session worksheets. This initial self- assessment gives you the basic information you need in an organized format.

Then you'll be able to review it and get straight to the business of coaching.

PREPARING FOR THE FIRST COACHING SESSION

You should never go into your first session with a client unprepared. Having a base of information about the client in advance makes the first session far more efficient. You won't be wasting time gathering information that's just as easily obtained beforehand. The client is not paying you for the hour you spend with them, but for the results you can help them achieve. And that requires prep time and the insight you get from the preliminary information you gather.

INFORMATION YOU NEED FROM CLIENTS

Before the first session, gather and organize all of the documents you need. This includes the client's completed self-assessment worksheet, an overview of their personal and professional background, and the goals they hope to attain through your sessions. Take a few minutes before each session to review these documents and get acquainted with them. If you're still relatively new at this, allow extra time for this.

EXPECTATIONS FOR THE SESSIONS

Discuss with the client and outline realistic expectations for your sessions together. These expectations should include the amount of time for each session, a typical session agenda, and how you will communicate with them. Define specific outcomes that they will walk away with from your sessions.

ANTICIPATE QUESTIONS

Try to anticipate questions or concerns they may have. This shouldn't be rehearsed or scripted. Instead, write down a few questions you can imagine your client asking and have an answer prepared. When you're just starting out, try putting yourself in the client's shoes and figuring out what you might ask.

Once you've been coaching for some time, these questions will be second nature because you'll have heard them over and over again. If the questions are generic to most clients, you can put all of them onto an FAQ page on your website so that you can save time during your sessions.

GETTING INTO THE ZONE

Before the session's start, make sure there will be no distractions. Close doors, turn off phones, and if you're working at home, let family members know not to disturb you. Prepare a system for taking notes during the session, either on paper or electronically. Some coaches and spiritual entrepreneurs record their calls so that they can go back later to hear exactly what was said. Prepare a glass of water, cup of coffee, or anything else you might need.

Mentally prepare yourself and get into the zone. You can do this through some type of pre-session routine that gets you into positive, energetic alignment where you're ready to connect with your client. You may try a grounding technique such as deep breathing. Whatever method you choose, remember that your sessions should be fun! Get into a state where you're enthusiastic and eager to help your client break through their obstacles and achieve success.

WRAPPING UP

Finally, make a plan for wrapping up your sessions. You need to stick closely to the time schedule created by you and your client, but the end of the session should be smooth and natural, not abrupt. It feels inconsiderate and unfeeling for a client if you terminate the session suddenly. You may want to designate the last five minutes of the session as a cooling down, questions, and review period. This is a good time to lay out expectations for your next session.

THE FIRST SESSION – CREATING AN INDIVIDUALIZED PLAN

The main goal of your first session with a client is to create a plan for all of the sessions that will follow. It establishes a form of contract between you and your client. This first session is also referred to as an 'intake' session. It's a session in which both of you take in information about each other. It's important for you in learning about your client and the same goes for them.

FREE CONSULTATION OR FIRST SESSION

This process of information gathering can be done either during the first session or as an initial consultation. Some coaches offer it for free, especially if they charge a great deal for their sessions. Offering an initial breakthrough session clears away all of these basic considerations so that during the first session for which the client is paying your fee, you can jump right in and start helping them solve their problems.

This free breakthrough session is where you determine if or how you can help them and offer your services. Through your initial communication, the client gets a taste of your expertise and sees that you're serious about what you do. After speaking to you about their problems and goals, they're much more likely to invest in your services.

There is a specific way these breakthrough sessions must be structured in order to help your client see the value of what you offer so they are eager to work with you and pay you for the value you offer.

This is the 4th stage of the Lucrative List-Building System taught in the Enlightened Business Success Academy.

SELF-ASSESSMENT WORKSHEET

The main part of the initial session with you is to walk through your client's self- assessment worksheet with them. Go through each item asking questions for clarification. Most importantly, clarify the client's goals. If goals are too vague or unrealistic, help them improve them so that they're more achievable.

RESPONSIBILITIES AND EXPECTATIONS

Define the responsibilities of both you and your client. In any type of coaching, the client and coach are equal partners. There's no such thing as a session where you as coach, mentor or advisor simply solves your clients' problems for them. There is work for both sides to perform, and this includes 'homework' that needs to be done outside of the sessions. Lay out the expectations for both of you.

MEASURING PROGRESS

Your client needs to see how they're improving as a result of their sessions with you. There needs to be some solid way to show them this. During your initial consultation, decide how progress will be measured.

SESSION DETAILS

At some point during the initial consultation, nail down the specifics of your sessions. Agree on how long each session will be, how often you'll meet, and how you'll communicate (by phone, Zoom, or other method).

BE FLEXIBLE

Decide all of these details and put them in writing, but don't be completely rigid. It's best to stick to the plan as closely as possible, but if circumstances or situations change you may need to revisit your plan and make amendments.

HOW TO RUN AN EFFECTIVE COACHING SESSION

Coaching, mentoring and healing sessions take preparation, but the most important things will get done during the session itself. In order to make them worth your client's time and money, your coaching sessions need to be as efficient and focused as possible. A time will come when all of this is second nature, but when you're just starting out, it takes some conscious effort to run effective sessions.

CREATE AN AGENDA

Every good session has an agenda. You do not want to improvise. The exact structure of your agenda is something you may want to discuss with the client before the first session. An agenda defines the basic flow of each session. An example would be:

- Greeting / warm up / opening discussion questions (to get your client thinking about today's topic)
- Summary of issues from last sessions / review of progress / questions from client
- Discussion on how to move forward
- Defining next action steps
- Cooling down and preparing for next session (including confirming day and time)

GREETING AND OPENING

Keep it short, but make sure that each session has a greeting. Say hello to the client and chat for a minute or two. The point is to build rapport and get both of you into the zone for the session. Many use this introduction to get the client ready for today's topic. They may give the client an opening question to get them thinking about today's topic. The most important thing is to create a level of comfort.

REVIEW OF PROGRESS

Reviewing the client's progress is extremely important. At some point during the session, discuss with them the objectives and action steps from the last session and follow up with them on what progress they're making with these. Aside from telling you what they did and how they felt about it, they should provide some concrete data as well.

QUESTIONS AND CHALLENGES

Most spiritual entrepreneurs and coaches ask their clients what challenges they're facing or what areas they need particular help with. A client may not clearly understand these themselves so you may have to draw it out of them. They may simply feel that things aren't going well but they're not sure why.

FEEDBACK

Provide your client feedback by focusing on what they've done well and what needs work. Whenever you discuss what they're doing, it's good to ask them first before you give them your ideas. Ask questions such as, “Why do you think that’s happening?” or “What ideas have you already considered for dealing with that?” You should then give your opinions on their ideas, which ones you think would work, and any ideas of your own. Give constructive suggestions and follow them up by confirming with the client. Ask them to repeat back to you what they need to do so that you’re sure they understand.

NEXT STEPS AND AGREED ACTIONS

The result of your suggestions should be clearly defined action steps that the client needs to take. The two of you should agree on these together. This gives them a roadmap to follow for the next session.

WORKING TOGETHER TOWARD A COMMON GOAL

Don't think of yourself as telling your clients what to do. Rather, the two of you are working together to discover the right course of action. What you bring to the table is your experience and knowledge. Always try to focus on the positives and the progress your client is making. As they struggle to move forward, they often lose sight of the progress they've made and become discouraged. Seeing their progress also ensures that a client will be happy with your services.

HOW TO DO A SWOT ANALYSIS

A SWOT analysis is a tool used by both corporations and individuals to form the big picture of a situation and assess which direction to take in solving problems or reaching a goal. On an individual level, a SWOT analysis takes a goal and analyzes a person's skills and external factors to determine which factors are favorable or unfavorable to them or their goal. This is something you can do with your client early in your sessions or possibly as part of the initial self-assessment.

SWOT stands for Strengths, Weaknesses, Opportunities and Threats.

S – STRENGTHS

Strengths can be both personal and business strengths, depending on the situation you're analyzing. These are things that are going well currently and that give your client an advantage in their life or business. They include things like the client's Unique Selling Proposition, the value they add to the marketplace, their good reputation among customers or clients, and so on. They also include personal strengths, natural abilities, and skills the client now possesses.

W – WEAKNESSES

Weaknesses are areas in which your client needs improvement. These may be situations where their business is struggling or obstacles that are holding them back from achieving their goals in some area of their life. They might be skills that are lacking or things the client wants to change about their current situation.

O – OPPORTUNITIES

Opportunities are things the client can take advantage of. They could be new opportunities in their health, relationships or business opportunities, new products, resources, potential business ventures, skills to learn, markets to tap into, or unfilled customer needs that they can address. Opportunities are external factors that can help your client gain an advantage in their lives or businesses.

T – THREATS

Threats are external challenges or obstacles that your client is facing. These could be financial problems, problems in the marketplace, or threats to personal stability. These external obstacles put clients at a disadvantage in their businesses or their lives.

Once all of these areas of the SWOT are identified, you can examine them in relation to the goal the client hopes to achieve. It becomes evident which areas will be most challenging and which are most favorable. You can then create a plan to move forward that strengthens the weak points and mitigates challenges.

The SWOT tool helps you create a roadmap for success for your clients. Although it's often used in a business setting, such as to assess and work on employee skills in a big company, the SWOT approach can be used for anything. It doesn't even have to be business related. You can use a SWOT analysis for personal goals and challenges as well.

A SWOT analysis is one of the best tools for brainstorming solutions. Use it early in your sessions with a particular client to address the most urgent goals. However, you may also choose to do one periodically during the course of your sessions as well, especially if any external or internal factors change.

ROOT CAUSE ANALYSIS – ASKING WHY

When we tackle problems in business or personal life, we have a tendency to go after symptoms and not root causes. Root Cause Analysis is a method used to figure out these underlying reasons for a problem. However, it's not used only when there is a problem or challenge, but also when things are going well. When your business is strong, it's good to discover the source of this strength so that you can repeat or reinforce it.

A Root Cause Analysis is based on asking 'why' multiple times until you discover the source.

GETTING TO THE BOTTOM OF IT

Root Cause Analysis starts with identifying the problem or challenge. An example of a challenge could be that your client has failed to achieve their goal of doubling the size of their list in the past three months. Ask the client why this is so and keep asking why until you get to the root cause.

To take the above example of the client trying to grow their list, an analysis might go something like this:

- Why didn't I double my list? Because I didn't know which strategy would work best
- Why didn't I know what strategy to use? Because I haven't tried enough different ones
- Why haven't I tried different ones? Because I've been focusing my time on product creation
- Why have I focused on product creation? Because I don't have other people to do it well
- Why don't I have people to do it? Because I haven't spent time to find outsourcers
- Why haven't I spent time finding outsourcers? Because I don't really trust others to create the product

When you finally reach the root cause, a solution presents itself to you. In this example, the solution would be to overcome the client's trust issue by setting up a reliable process for outsourcers to use in creating products. Overcoming trust issues may entail things like establishing an interview process for hiring help, setting specific quality standards, and effectively training content creators.

MANY DIFFERENT APPROACHES

In Root Cause Analysis, the solution isn't always to remove the root cause. It may be that a slight change somewhere along the way would produce the desired outcome or remove the obstacle. The important thing in Root Cause Analysis is to see the process of cause and effect playing out. You then know which factors can be changed to affect other factors.

VISUAL REPRESENTATION

It helps a great deal to diagram your analysis and visually represent it. The client can then easily see how each factor affects each other. In the above example, they may choose to focus less on product creation and invest more time in exploring other strategies. They may choose to take some of their daily time away from creating info products to try out different list-building methods.

In addition to using Root Cause Analysis in your sessions, you can also teach a client how to do it on their own. This is a valuable business skill that everyone should have and it can also be used for problems in your personal life.

THE POWER OF HIGH-IMPACT QUESTIONS

High-impact questions are questions that make a person think more deeply about an issue. Close-ended questions result in a yes or no and often don't get any deeper than that. Open-ended questions can solve problems, but they may also generate a list of options or ideas. High-impact questions get the client out of their set way of thinking and presents problems to them with an urgency that leads them to take action. They deal in the here and now.

THE ELEMENTS OF A HIGH-IMPACT QUESTION

The elements that lend this impact to a question are:

- It is simple and direct, dealing in reality instead of speculation
- It encourages creative thinking and thinking at a deeper level
- It encourages self-reflection

High-impact questions get a client closer to attaining a goal or solving a problem. They get things done by dealing not only in 'why,' but in 'what' and 'how'.

WHICH ONE DO YOU CHOOSE?

You can take any question and turn it into a high-impact question by simply wording it differently and seeking a different answer. Imagine, for example, if you'd like to ask your client, 'What tasks would you like to outsource in your business?' An alternative high-impact question that asks essentially the same thing would be, 'If you could pick just one task to outsource in your business today, what would it be?'

In the original question, you're asking something in the realm of imagination and ideas. The 'would like' of the question places it in the abstract. What you're doing with the second question is asking them to make a clear decision – which *one* would they outsource? You also put a time marker on it by asking them which they'd choose *today*. It becomes more urgent and real, and the question's answer leads directly to an action step – outsourcing that task.

This is a priority question and can be used for anything at all to get effective answers. You can ask clients which one thing they'd change about their situation or business. This forces them to choose one top priority, and that's the first step of taking action when you have many options.

PICTURE YOURSELF…

Here's another example. Instead of asking your client, 'What would you like to be doing in five years?' ask them instead, 'Imagine that it's five years from now. What does your life (or business) look like on a day-to-day basis?' With this example also, we're not asking them what it 'would' be like. Even though we're using our imagination and picturing the future, you make it more real and immediate by saying 'what does it look like,' as if you were living it right now.

This is more likely to produce answers that are clear and specific. Instead of saying, 'I'd be happy and successful,' they may say something like, 'I don't spend any time creating my own content because I have a writer who does that.' They've just defined a goal – finding and hiring a good writer for their content creation.

PART 2 – LISTENING

Turning regular questions into high-impact questions that elicit clear actionable answers is only the first step. As a coach or spiritual entrepreneur, you also need to listen to their answer closely and use it to guide them toward those action steps. Don't judge their answer on whether it's wise or unwise, but rather on whether or not it's coming from a genuine place. The whole point of high-impact questions is to get them into the zone of thinking more deeply about their problems and challenges.

TIPS FOR HELPING CLIENTS SET PRIORITIES AND CREATE ACTION PLANS

Your most important job as a spiritual entrepreneur or coach is to help clients prioritize and start taking action on the things they need to do to improve their lives and their business. You have to help them not only discover what needs to be done, but also get started doing it. This is how they get closer to their goal. And when the client succeeds, you do as well. When they see benefits, they realize the value of working with you, stay with you, and tell others about you.

THE BIGGEST FIRST

The client's first priority should be the biggest project that will have the greatest impact on their business or life. It's usually not hard for a client to name this. However, if they're struggling you can use Root Cause Analysis, high-impact questions and other methods to help them uncover their most significant issue. Sometimes it's just a matter of making a list of priorities and choosing the biggest. Ask them, 'If you could accomplish only one thing, what would it be?'

BREAKING IT UP

Once you've identified the biggest project and goal, break it down into sub-goals. These are milestones along the way that will get the client closer to that big goal. Each of these milestones is then broken down into clear action steps. These are things your client can *do* on a daily basis to reach their sub-goals and eventually big goals. If an action step or milestone seems too big, break it up further until you have a list of daily tasks.

WORK BACKWARD

There will often be certain tasks that need to be accomplished before others. In this case, these preliminary tasks should be given priority. For example, a web site needs to be finished and filled with at least a little content before you start driving traffic to it. What can you do with that traffic if the site is empty? Put all of the tasks for a particular milestone into chronological order.

TIMING IS EVERYTHING

Big goals are hard to reach because they operate on a different time scale than we do. We need to be able to see the attainment of these goals day by day, or even hour by hour. Each step along the way toward a goal should have a timeline.

Timelines give your client a realistic deadline in which to finish tasks and reach milestones. Although your client will want to move forward as quickly as possible, they may need to curb their enthusiasm. It's important that timelines be realistic. Otherwise, your client will fall behind.

Set reasonable deadlines and allow for some flexibility if tasks take too long or are finished quickly.

ALLOWING FOR CHANGE

There may be changes in strategy along the way as your client discovers what works for them and what doesn't. It's okay to make whatever changes are necessary as long as goals remain clearly defined. Timelines, small tasks, action steps, and milestones can be shifted, but keep major goals in place.

TIPS FOR TAKING ACTION – HOW YOU CAN HELP YOUR CLIENTS SUCCEED

In the course of your coaching sessions, both you and your client have action steps to take. Both of you need to be committed and accountable to each other. These are tasks that must be completed between coaching sessions in order for you to move forward.

CLIENT-GENERATED STEPS

The action steps created in your sessions work best if they're client-generated where possible. If you lay out a plan and tell them what to do, they're far less likely to actually do it than if they've chosen those steps themselves. You're not the boss but rather a guide with years of experience and knowledge your client lacks. Ask for their ideas first and then help them modify those steps if needed. Make sure all action steps are agreed to by your client.

VERBALIZE IT

When your client puts forth an idea of something they should do and you recognize it as a suitable action step, ask them something like, 'Is that the step you want to take?' They should then say back to you, 'Yes, that's what I'm going to do.' What this does is take an idea and turn it into a task to be carried out.

Verbalizing the task solidifies it in your client's mind and makes them visualize getting it done.

All action steps for both you and the client should be written down. You can send the file to them by email or through the chat service you use, or have the client document their action steps themselves. In that way, they assume responsibility.

LITTLE REMINDERS

It may be a good idea to set up a reminder system. Your client may get busy and forget that they have something to do. You can schedule email reminders and send them to your client. The reminders should reconfirm the details of what needs to be done. You can automate this by using an email autoresponder for your coaching clients. As long as you're doing this, you might include daily motivation tips or inspirational quotes to nudge them along. This of course is optional, but a nice 'value-add' to the services you provide.

GETTING STUCK

Create a plan for how to deal with challenges if a client gets stuck on a task. You might agree on a certain number of out-of-session emails they can send you with questions. Outline clearly when they are to contact you and when they should not. If it's not a critical task, you can ask them to move on to something else and you'll deal with it in the next session. When setting your coaching fee, take into consideration the time you'll need to spend on these emails.

ENCOURAGING BUT FIRM

Be firm about these action steps. Remember that when your clients take action and work toward their goals, this empowers them. Failing to do so weakens their commitment to attaining their goals. Make sure your client understands that you're there for accountability and to call them out if they aren't doing what they committed to do. Let them know it's because you want them to succeed.

REWARD AND ACKNOWLEDGE

Whenever they complete an action step or sub-goal, give them a great deal of praise and acknowledgement. People have to be shown the progress they're making. Hold mini-celebrations or send emails that say, 'I just wanted to let you know you're doing a great job.' This keeps their commitment strong and builds confidence.

NO SHOULD'S OR OUGHT'S

Whenever communicating with clients, avoid equivocal language or words such as 'should' or 'ought.' Replace them with decisive words like 'will.' Instead of 'what should I do to increase sales' they should ask 'what *will* I do.' This is a small detail but it has a powerful psychological effect.

AFTER THE COACHING ENDS – MAINTAINING MOMENTUM

Once your coaching sessions with a client are over, your client is far from finished. The goal of your coaching is not just to help them overcome a challenge or reach short-term goals. It should be to foster in them lifelong skills they can use for future success. There are concrete methods you can use to do this.

A LONG-TERM ACTION PLAN

By your last session with the client, you should create a long-term action plan with them. Walk through it together during the last session. Their action plan should include agreed upon goals and deadlines, areas to focus on and how to improve these areas, strategies and plans, resources they can use in the future, and any other specific actions they need to take.

BE YOUR OWN COACH

During the course of your coaching, teach your clients how to use the methods you're using for themselves. Root Cause Analysis, SWOT analysis, high-impact questions, and many of the other techniques coaches employ can be used by anyone. As long as you're willing to be honest with yourself, you can use these tools to further your business or personal goals. Encourage your clients to continue the habit of self-analysis and point them toward resources that will make them more self-sufficient.

ESTABLISHING ACCOUNTABILITY

One of the most important things you've done for a client during your coaching sessions is to provide them with accountability. They are more likely to do what they say because you're going to be following up. When you're no longer there, it helps them a great deal to have someone else to fulfill that role. This person is called an 'accountability partner.'

An accountability partner can be absolutely anyone. Their job is simply to check in with their partner (you) periodically to see how they're doing and whether or not they're acting in accordance with the plan. They usually do quite little actually; simply being there helps. As their coach, if they do not choose to continue on with you, you may choose to point them to other places where they can easily find accountability partners.

A SPACE FOR YOUR CLIENTS

You may choose to create a place where all of your past clients can hang out and help each other. You could form a Facebook group where they can all support each other. It's good to have a membership area where present and past clients have access to resources in case they get stuck. This can be thrown in as an added bonus for your coaching service, allowing you to charge more for it.

EXPECTATIONS AND RESULTS

At the end of your coaching sessions with a client, it's important for both of you to review the process and decide how well the goal was attained. This reflection is important and will allow both of you to pursue future endeavors more successfully. It's also good to occasionally follow up with clients from the past to see how they're doing. Not only does this build your relationship, but there may be the opportunity to sign the client up for more sessions.

CONCLUSION

Coaching can be one of the most rewarding professions you'll ever experience. Seeing people change their lives and their businesses for the better can give you a profound feeling of satisfaction and excitement, knowing you were instrumental in that change.

In this toolkit, we've covered each stage of the coaching process that will enable you to help your clients make the changes they need in order to reach success. You'll be able to:

- Prepare clients for coaching
- Prepare yourself for coaching sessions
- Conduct effective coaching sessions
- Create realistic action plans
- Motivate your clients to take action
- Ensure continued progress after sessions end

Keep the worksheets in the Coach's Toolkit handy, make copies, and review this manual from time to time to refresh your memory.

Good luck on your coaching journey!

ABOUT EVA

Eva Gregory is an award-winning transformation catalyst and business mentor helping established coaches, thought leaders, and spiritual entrepreneurs worldwide scale to six figures and beyond by integrating Inner Guidance with proven business strategies that are working today in an ever-changing market. The combination of practical, step-by-step business training and intuitive spiritual awareness is what sets her apart from others in her field.

Join her Successful Spiritual Entrepreneur Facebook community here, where you'll receive plenty of tools, resources, and training on how to grow a successful enlightened business that lights up your Soul!

APPENDIX: YOUR COACHING TOOLKIT WORKSHEETS

On the following pages, you'll find worksheets for all of the coaching steps referred to in this manual.

SELF-ASSESSMENT WORKSHEET

1 **What are your main goals for your coaching sessions, in priority order? What do you hope to get out of your coaching sessions?**

2 **What challenges do you face? What is most difficult for you right now?**

3 **What are your 3 biggest strengths?**

4 What are your 3 main weaknesses?

5 What ideas do you have for moving forward? (Your coach will review these and offer suggestions)

6 What is your preferred learning style? I.e., do you prefer to see, hear or read in order to learn best?

7 **Do you have any ideas on how you'd like coaching sessions conducted? Describe your ideal coaching session.**

8 **Please write any questions or concerns you have.**

BUSINESS OVERVIEW WORKSHEET

BACKGROUND INFORMATION

Business Name:

Contact Information:

Brief History of the Business:

MARKETING

Target Market:

Unique Selling Proposition:

Main Competitors and their USP:

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FINANCES

Total Monthly Revenue:

Total Monthly Costs:

Number of Employees or Outsourcers:

OTHER

Any additional information you think your coach should know:

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COACHING SESSION CHECKLIST

BEFORE SESSION

- [ ] Payment arrangements
- [ ] Gather all relevant information from client
- [ ] Review client information including Self-Assessment Worksheet and Business Overview
- [ ] Eliminate/minimize distractions
- [ ] Note-taking materials / recording
- [ ] Mental preparation
- [ ] ____________________
- [ ] ____________________
- [ ] ____________________

DURING SESSION

- [ ] Allotted time for each session
- [ ] Schedule
- [ ] Outcomes client hopes to achieve
- [ ] Client questions and concerns
- [ ] ____________________
- [ ] ____________________
- [ ] ____________________

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WRAPPING UP

- [ ] Review / summary
- [ ] Action steps
- [ ] Confirm next session time
- [ ] Other preparations for next session
- [ ] Questions and concerns
- [ ] Payment (if being paid per session)
- [ ] ____________________
- [ ] ____________________
- [ ] ____________________

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INDIVIDUAL COACHING PLAN WORKSHEET

GENERAL INFORMATION

Client Name:

Contact Details:

SESSION PLAN:

Total No. of Sessions:

Frequency of Sessions:

Session Day/Time:

Communication Methods:

SESSION DETAILS

Client goals and expectations:

Method for measuring progress:

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SESSION DETAILS (CONTINUED)

Preferred learning style:

Special client concerns:

Homework / pre-session planning for you to do:

Ideas for session contents:

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COACHING FEEDBACK WORKSHEET

Client name/date:

Progress made:

(Specific progress made toward goal since last session)

Areas that need improvement:

(Specific areas where the client isn't making progress)

Other:

(Any other relevant feedback)

Action Steps:

(What steps to take to address areas for improvement and/or to reinforce progress)

COACHING SESSION AGENDA

Client Name:

*(*Describe each element, its purpose, and an approximate length of time)*

Agenda Item	Time (00:00 to 00:00, x minutes)
Greetings	
Element 1	
Element 2	
Element 3	
Element 4	
Element 5	
Wrap-up/Next Steps	

**Your session agenda doesn't need 5 elements; keep blank or X out those you don't use*

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SWOT MATRIX

Strengths	Weaknesses
**What strengths, skills, abilities, advantages, and resources do you now have that give you an advantage?*	**What challenges, lack of skills, obstacles or needs do you now have that put you at a disadvantage?*
Opportunities	**Threats**
**What new skills, potential markets, business ventures, resources, and marketing channels, are available that would give you an advantage?*	**What potential problems do you now face that may put you at a disadvantage?*

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ROOT CAUSE ANALYSIS WORKSHEET

PROBLEM:

Answer 1
Answer 2
Answer 3
Answer 4
Answer 5
Root Cause
Solutions

** You don't have to stop at "5" whys. Just continue on to another page until you get to the root cause. It may not even take 5 to get you there.*

HIGH-IMPACT QUESTION WORKSHEET

**Prepare open-ended questions to use in your coaching sessions. Brainstorm ones that will make your clients really think about their business, goals, purpose, motivations, challenges, or any other issues that you typically address in your sessions.*

Topic/Issue	Questions for Coaching Sessions
(E.g., Time Management)	*(E.g., 'If you could pick just one task to outsource in your business today, what would it be?')*

GOAL AND MILESTONES WORKSHEET

Primary Goal: *Define goal as specifically as possible*	
How will you measure your success?	
What specific milestones are needed to reach your goal?	Deadline: Milestone 1: Deadline: Milestone 2: Deadline: Milestone 3: Deadline: Milestone 4: Deadline: Milestone 5:

ACTION PLAN TEMPLATE

What do you need to complete first to reach your goal?	
How will you measure your success?	
What specific action steps are needed to reach this milestone?	Deadline: Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step:

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ACTION PLAN TEMPLATE (CONTINUED)

What do you need to complete next to reach your goal?	
How will you measure your success?	
What specific action steps are needed to reach this milestone?	<u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step:

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ACTION PLAN TEMPLATE (CONTINUED)

What do you need to complete next to reach your goal?	
How will you measure your success?	
What specific action steps are needed to reach this milestone?	<u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step:

ACTION PLAN TEMPLATE (CONTINUED)

What do you need to complete next to reach your goal?	
How will you measure your success?	
What specific action steps are needed to reach this milestone?	<u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step: <u>Deadline:</u> Action step:

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ACCOUNTABILITY PLAN

GOALS

Original Goals:

Goals Achieved:

Next Goals and/or Milestones:

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STRATEGY

The Big Three:

**What are your top 3 strategies for reaching your goals?*

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NEXT STEPS

Priorities to Focus On:

**These can be strategies, behaviors, actions or other important items that came out of the coaching and review of your progress.*

Action Steps:

**What are the key actions you are going to take next to continue to work towards your goals? Put them in priority order.*

1.
2.
3.
4.
5.
6.
7.
8.
9.

RESOURCES

Where To Get Help:

**This could include forums, a membership site, website resources, or other places to go when you have a question.*

Essential Resources

