MASTERY
for coaches

Scripts
REFERENCE GUIDE

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Script Reference Guide

This guide is here for you anytime you need to reference something. It's designed so you can easily go back and find what you're looking for. The examples are meant to inspire you as you craft emails and have conversations so that they feel authentic, heartfelt and your own. This is about being in your professionalism, being generous and in your leadership.

Every situation is different, so, of course you will say things that are most appropriate for that person at that time, based on the relationship you have with them. People will need different qualities from us as coaches, so instead of being rigid and doing things a certain way with everyone, be flexible so you can show up in a way that truly serves them. For example, some people will need us to be direct and hold tight boundaries, while others will need us to be softer, still clear, but not so black and white. We always want to look through the lens of "How can I serve them?"

Enjoy implementing these and discovering a whole next level of mastery in your business!

Coaching is about truly seeing someone. It's about helping them see what they think is impossible, isn't, and then supporting them to show up for and live what's most important in their lives.

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Setting Fees + Raising Fees

Setting Up Pro Bono Packages

If you're a new coach and have never coached anyone, you can create a few spots to start so you get into the experience of coaching and build your confidence. If you do pro bono to start, the way to set these up will be important. You'll want to make sure your clients are fully committed to showing up and that they have 'skin' in the game, since payment isn't involved. You want to position these invitations so it calls them forward vs offering it as, "Can I coach you?" I have some examples for you below. I suggest making these packages shorter and having clear time frames around when they expire or when you will both re-evaluate what it looks like moving forward.

To set up Pro-Bono Packages effectively, you might say:

- "I'm offering this to 2 people and it's through invitation only. I won't be doing this again, so if this is something you'd like to do, I'd be happy to offer it to you under a few circumstances. One, is that you'd be willing to show up in action through the entirety of the program, and two, that you show up on time for every session, etc."
- "I have 'x' spaces for complimentary coaching packages and I'm not going to offer this again. I want to invite you to have this experience as a gift, but I would have some requirements of you if I'd be willing to offer you this space."
- "I only have a few slots I'm offering at (reduced price or pro bono) and I'd be willing to offer you one under certain conditions. Would you like to hear what those would be?"

Moving from Pro Bono to Paid Coaching

Sample statement you can say at the end of a Pro-Bono Package:

- "We have x sessions left of the package. Moving forward, I'm not taking on pro-bono clients, but if you'd like for me to set aside time to explore what it could look like for us to continuing working together in this new way, let me know. I'm willing to do that."

If you've been doing Pro-Bono too long and are moving towards paying clients, you can say:

- "I realize that this kind of arrangement won't serve you anymore. Investing for your dreams is the best way I can support you moving forward so that you get to experience the level of transformation that happens when you show up fully for yourself in this way."
- "I want to coach you to stand in your power, to know what you're capable of and really go for it. Investing in yourself and what you want is a part of that." If they aren't ready now, you can let them know, "When you're ready, know that I am here and we'll get started."

Raising Fees with Old or Current Clients

If you are considering continuing to work with someone after a longer package has completed and you've raised your rates, here are some suggestions of how you can explore that conversation with them:

Around the second to last session, if you don't share your new fee with a client, you can say:

- "If you're feeling like you may want continued support, I'm willing to make our last session include extra time so we can dive in, set you up for what's next and if at that time you're feeling like you want more support, we can explore what another package would look like."

You can also let them know that your rates have increased before the session:

- "My rates have increased since we started working together. How about this, I'm willing to add extra time on to the last session of this package to support you in what's next and if it seems like you're wanting continued coaching after that, we can talk about what that would look like. Is that something you'd like to do?"

Authentic Marketing

Communicating What You Do!

When you meet someone, and they ask what you do, I recommend saying 1 of 5 things:

1. Say what type of coach you are.

   - **"**I'm a _____ coach." (i.e. health coach, business coach, relationship coach, or it could be general life coaching. It just depends on what you do.)

2. Share a statement where you leave people wanting to know more.

   - "I help people go from good to great."
   - "I support people to play at the top of their game."

3. Say a statement that either everyone would want, shares the benefits of the work you do, and/or how it helps relieve people's challenges.

   For example, if you're a parenting coach you could say,

   - "I help parents have less stress and connect with their children more."

4. Tailor what you do, so that it directly speaks to the person asking.

   For example, if you're a business coach at a startup event, you'll probably introduce what you do differently to early stage entrepreneurs than you would to successful executives further along in their business development.

   - "I support entrepreneurs in avoiding the common pitfalls that most businesses go through in the early stages."
   - "I help executives who are already successful play a bigger game."

5. If someone asks you what you do and you already know you want to invite them in, you can say:

   - "Coaching is transformational and every coach works differently, so it's hard to put into words. I'd be willing to create 60 mins to support you all around what's most important to you or we could address one of the biggest stresses in your life. That way, you have an experience of it. Is this something you'd like to do?"

Personally Crafted Invitations

General Guidelines for Invitations - whether with Cold or Warm Leads:

- **Share the context** for what this is:

  Ex. "I'm simply offering x of my time. If I can help, I'd be happy to."

- **Help them get excited** - about what's possible in your time together:

  Ex. "This session could change the way you do business from now on."

  Ex. "This session has the potential to change your relationships from here on out."

  Fill these in with what makes sense for your business and with your words.

- **Offer to help them** with their challenges or their dreams:

  Ex: "This is a complimentary coaching session, where we'll dive into your life, your challenges and strategize about what's most important to you."

  Ex. "I have a couple ideas for you around x. If it would serve you, I'd be willing to make time to support you with it, whether we work together or not."

- Give people an easy out.

  Ex. "Please know that if this isn't something you'd like to do, I support you in saying no. Just let me know either way."

Cold Leads vs. Warm Leads

For Cold Leads, you will often invite them to a consultation before inviting them into a complimentary session. If it's a stronger relationship (warmer lead), you can invite them straight into a complimentary session to support them with what they're up to if that feels right. Use your intuition.

Here are some examples that you can reference and get inspiration from as you consider reaching out to potential clients and inviting them into either a consultation or a complimentary session. You'll want to make sure that you're doing the next appropriate thing to build that relationship.

Invitation to a Consult Ex. 1:

Hi Tim, I hope you're wonderful. You've been on my mind and I have a few ideas for you about your leadership team (whatever is true for you knowing who they are and what they are up to). If it would serve you, I'd be happy to jump on a call and share more about it. Let me know either way.

Invitation to a Consult Ex. 2:

Dear Sam,

You've been on my mind and I have some ideas for you. Let's talk…

Let me know if one of these times work for you:

Friday, March 3rd at 3pm

Sunday, March 5th at 5pm

Best

Invitation to a Complimentary Session Ex. 1:

Dear X,

I've been thinking about you and have some ideas for your business and how you might move forward on x y z (or whatever you know they're up to or would want support with).

If you're interested, I'd be willing to create 90 minutes to support you all around what's next steps for your business. This would be a complimentary session.

If this isn't something you'd like to do, no problem, just let me know either way.

Warmly, Diane

Invitation to a Complimentary Session Ex. 2: If you already have coaching clients and you only have a few spaces left in your practice, here's another example.

Hi X,

I love offering my time to support people who are making a meaningful difference in the world (or you could say: having something special to offer… anything that feels true for you).

Knowing what you're doing, I was inspired to reach out and offer you a complimentary coaching session. I don't do this very often, my coaching practice is generally full and I mostly work through referral, but I felt moved to reach out.

The intention of the session would be to strategize about what you're up to or we could get into an area of your life that isn't currently working and go for it.

The sessions I do are full on so if this doesn't resonate for you, I completely support that. Just let me know either way.

If yes, we'll want to make sure to set aside x (length in time).

And, either way, know I'm in full support of you and what you're doing the world.

All the Best, You

Once they've said Yes! See page 22 for more information.

Following Up

General rule of thumb: Anytime you follow up with a potential client, don't just follow up for you "checking in" with them. Be in service and offer something of value in your communications based on what you know they're wanting support with.

Ex: "I know you were looking for an office space and I have a referral for you that I think would be perfect for you."

Referrals

1. Who are you already serving?

Do they have people in their lives that could benefit from your services? Their boss, friends or family members? If they do, you can tell them:

- "I'd be willing to have a conversation with them as a way to support and see what will help them most moving forward."

Or, after a complimentary session with someone, you can ask them:

- "Is there someone in your life you know who could benefit from a session like you just had?"

2. Acquaintances or Strangers

If an acquaintance or stranger is telling you about someone who is having a hard time or needing support, you can say:

- "I work as a life coach (however you define your work). If you think it would serve x, I'd be willing to take time to speak with them and see what would be best for them."

If someone is being referred, you might ask:

- What are their challenges?
- Why would they be a good fit?
- People want to help each other and a friend having a solution would be happy to report back with support.
- Make sure to have the referral call you. You don't reach out to them.

Gifting a Session

Clients talk about people in their world. You can share with your client that they can give a session to someone in their life, as a gift from your client to their loved one.

- "If it would serve John, I'd be willing to offer him a session to sit with me and support him, as a gift from you to him. Is that something you would like to offer him?"
- "If at any point you have someone in your world you want me to support, I'd be willing to gift them a session from you. No strings attached."

Towards the end of the session that was gifted, you can see if they ask about wanting more support like this or you could leave it as it is. You could either say:

- "Do you have everything you need to move forward with this?"
- "You may have received everything you needed today but I just wanted to open the conversation in case you'd like to have more support with your goals."

That person may come back to you in a week, a year or maybe they got all their needs met. I wouldn't suggest trying to actively enroll someone in the same way if they came as a gift-a-session.

The Art of Creating Clients

Phone Consultation

This process will vary depending on whether you reached out to them or they reached out to you, so you'll want to gauge what makes the most sense for each situation. The main purpose of the consultation is to see if you want to invite them in for a complimentary session and possibly work together.

These guidelines are generally true for most consults.

1. **Hear from them.** Build rapport and connection. Slow down, listen deeply. What's going on it their world? What are they challenged with? What are they wanting to create?
    - "What prompted you to call me?"
    - "What are you looking for from coaching?"
    - "What's going on in your world?"
    - "So tell me, you reached out for coaching, what do you see as possible for yourself, what is it that you are wanting?"
2. If it feels right, **offer targeted value** around what they're wanting.
3. Answer questions they may have and educate them about what coaching is, if needed.
    - "Do you have any other questions for me?"
    - "Tell me what you know about coaching. Do you have any experience with it?"
    - If they need to know what coaching is, you might say,

    "Coaching is about about upleveling your life. It's about going from good to great."

> "Coaching is about helping you live what's most important to you. It's about closing the gap from where you are to where you want to go…"

If they ask about your fees:

- You can share how you work and share your fee, although you may choose to wait until you've had a Clarity Session to share this with them. You may say,

  "I won't know what's going to serve you unless we have a longer session about where you are and what you want."

  "I won't know the level of support you need until we have a longer conversation. How about this, I'm willing to offer you a complimentary session where it be all about you and what's going on in your life. By the end of it, we'd know what level of support would be best for you and can talk about details then. If on the other hand, I find that you would be better served by another coach, I'll make a referral then."

- Sometimes when coaches are busier in their practice, they often won't sit with someone unless they know their fee first and they'll say something like,

  "My fees are $x for x length. I don't know if working together makes sense. At this point it's still too early to know until we have a longer conversation."

4. A**ssess** to see if you would invite them into a Clarity Session or if you'd send them off with another referral.

5. **Invite them into a Clarity Session:**

If you do offer them a Clarity Session, you could say something like this,

- "If we were going to take the next step, we would do a real coaching conversation and by the end of that, we would know if working together made sense."

- "I never offer to work with anyone before having a complimentary session to hear what they're really wanting, how ready they are and if I can help. This is the way that I choose my clients and people get a lot of value in the process."

6. Once they've said Yes!

- Book the session right there on the phone. You can email them later, but I think it's more convenient while you're both there.

  I suggest sharing 2 times for the session so you take leadership and streamline things:

  "Here are two times: "May 4th @ 5pm or May 6th @ 2pm"

  Again, have the session in a professional setting, undistracted.

- Help them get prepared.

  Dear X,

  We're all set for Friday March 18th at 1pm PST.
  As a way to prepare you to get the most out of the session, please answer the following questions:

  1. If you didn't have any fear or limitations, what would you create in the next 12 months?

  2. What do you imagine has the potential to get in the way of you achieving this?

  Please send me the answer to these 24 hours prior to our session.

  My office address is X.

  Make sure to leave 90 minutes for our session.

  Thanks,

  You

Another thing you can do instead of sending general questions, is to send them more targeted value with either a TED talk or article based on what you know they're up to and have them send you their thoughts reflecting on it.

Keep it simple but help prepare them and get them excited for your time together.

If someone shows interest and you don't hear back.

If you send specific times to connect but don't hear back… The key for this is total innocence - just service and neutrality.

Here is what a follow up email could look like:

> *Dear "x"*
>
> > *I want to make sure you received the email below.*
>
> *- Or-*
>
> *Dear "x"*
>
> > *I just want to make sure you're not interested in having me hold on to one of these times for you, before I give them away.*

Challenges with Scheduling

If a potential client is back and forth around scheduling, they've cancelled or re-scheduled more than once and you can tell they are not making this a priority or that excited about it, that's when you want to tighten the frame and either have them be in or out. This isn't about shaming them, it's about getting clear.

- Get them on the phone for a quick call. You may say something like,

  "I'm not sure this is the best time for you. Let me know when you have something you really want support with and we'll go for it."

  "My sense is this isn't a priority for you and that's totally fine. Is that accurate?"

  "My sense is this isn't a priority right now and that's totally fine. I'm going to take the session off the books. When you have something you really want support with, let me know."

Clarity Session Examples

The 7 Steps of a Clarity Session

1. **Context**. Essentially, it's about orienting them to what you're offering in a Clarity Session.
2. **Connect:** Authentically be there, listen to them, and build a trusting relationship.
3. **Vision:** Help them clarify their dreams and what their ideal situation looks like.
4. **Now**: Where they are now in relation to their goals?
5. **Obstacles**: What might hold them back from living into their vision?
6. **Serve:** Demonstrate a piece of your work, ideally with one of the blocks you identified or help them strategize about a dream they have.
7. **Offer:** If it feels right, you can invite them to work with you based on what would serve them and how you work.

Context:

➢ Ideally, you'll do this in the consultation, but if not, you'll want to do this in the beginning of your session. You'll let them know:

how long the session is
how they can prepare to make the most out of your time together
help get them excited for what's possible
you may want to ask if they know what coaching is and isn't.

Connect:

➢ Slow Down, Be There Fully and Listen Deeply

"Really, tell me more..."
"What's that like for you?"

"I hear you…"
"I can appreciate that..."
"Wow, that sounds really challenging / wonderful..."

- Meet them where they are. What is this person into? Are they a poet and appreciate metaphors or are they a triathlete and like a challenge?

Questions to Elicit their Vision:

- "What does an extraordinary life look like for you?"
- "If you looked back and said that was the best year of your life, what would it have been like?"
- "If you didn't have any fear or limitations, what would you do?"
- "How would you like your life to ideally be in the next 12 months (insert your length of packages)?"
- "If you transformed one area of your life that would make the biggest difference, what would that be?"
- "What are your top 3 goals for the year?"
- "What inspires you? What gets you most excited and lights you up?"
- "What's an area of your life you want a breakthrough in?"
- "If we were going to address one thing in your life, what would it be?"
- "What are you not doing that in your heart you know you should be doing?"
- "What's missing in your life?"
- "What's great that you'd love to improve?"
- "What's the most important thing to you? Are you honoring and living it daily?"
- "What do you see as possible if we were to work together for x months from now?"
- "What is the legacy you want to dedicate your life to and leave behind?"
- "If there were 1 thing we could work on together that would

transform your life, what would that be?" Help them see bigger, into what really matters to them and then coach them on that!

Secret Tip: Help them Identify the Deeper Goal

- "What do you want (X) money for? "
- "What do you imagine it will give you? Or what would life be like with x?"
- "Why does accomplishing these goals matter to you? What would it mean if they happened? What would it mean about you and your life?"
- "What are you doing this for? Why?"

Now:

- "What percentage of your vision are you living now?"
- "What happens if you don't do anything about this? How will things be 6-12 months?"
- "How would you feel if things stayed the same?"
- "What do you risk by not going for your dreams?"

Obstacles:

- "What are the obstacles you perceive are in the way?"
- "What has prevented you from living your dream? Or really going for it?"
- "Why haven't you achieved this yet?"
- "From your perspective, what do you see as the deeper issue here?"
- "What's the biggest challenge you're facing right now?"
- "What's the biggest source of your stress in your life?"

- "If we were to work on something together what is the biggest project or fear we could address?"
- I also suggest offering what you see as possibly holding them back based on what you notice in your session and see how it lands for them.
- Some common ones I see are:

  People pleasing
  Fear of failure or fear of rejection
  A limiting story about not having enough time or money
  Insecurity and self doubt
  Perfectionism
  They don't feel ready yet

Serve:

This is where you give them a taste of what you do. Demonstrate some of your work with them. Leave them better off for having connected.

Mastery Tips

- Here are some specific suggestions for offering a powerful coaching session:

  Make sure they want feedback or coaching before you offer to support them.
    "Is it ok with you to share what I see?"
  Help show them that what looks impossible, isn't.
  Help them let go of a judgement or a fear.
  Watch their body to look for what's true- more than what they tell you.
  Challenge a perception they hold and how they see the world.
  Ask insightful questions so they can hear their own wisdom.
    "Does this show up in any other area in your life?"
    "What do you get for hiding / judging yourself / whatever problem is? What's the benefit or payoff?"
  Help wake them back up to who they really are! Help them see their wholeness...

Before making an offer I suggest getting a sense for how important what you've identified as their vision is to them. You could ask,

- **"On a scale from 1-10** (10 being this is the most important thing for you right now) How important is what you identified as your vision for you?"
- "I only coach people who have a project they rate at an 8 or higher."

If it's lower then maybe it's not the right project or maybe it's not time and they don't want it. It serves you and them to be clear up front.

You may choose not to offer to work together for whatever reason. If so, frame this so they can see how it's in service them.

You can say:

- "My sense is I'm not the best coach for you. Here is someone I think will serve you better based on x y z."

Making the Offer

Embody your professionalism, take leadership and know the value of your work.

1. Initiate the Offer:

- "Is this something you would like support with?"
- "Do you want to invest in yourself in this way?"
- "Would you like to hear how I work with people?"
- "Did you want to talk about the possibility of us working together?"

2. Share the details of how you work.

- "I only take on a limited number of clients a year. When I take someone on, I either work with them for 4 months or 8 months. I meet with clients 2 times a month for an hour and a half each with spot-coaching in between as necessary…"

- "I work with people in these 2 ways: x and x. For you, my sense is x would be best. I see clients in that way for x times a month for x length and I offer spot-coaching in between sessions as needed."

3. Ask if they have any questions about those details of HOW you work first:

- "Thoughts, feelings, questions?"

4. Then, share the investment (I use the word "Investment" instead of cost)

- I recommend sharing 1 or 2 packages you offer. Not more. You don't want to overwhelm them with options.

  "For a 3 months of coaching it's $X or 6 months for $X"
  "The investment for x months of coaching is $X".
  "The total investment for the 9 month program is $X."
  "You can pay it upfront with a bit of a savings or you can pay it monthly."

5. Silence. Get comfortable with silence. Allow them to tell you where they are.

Then they'll say yes, no, maybe or have questions…

Switched Roles

Every once in awhile a potential client will try to take control of this conversation. They say may something like:

- "What will you or coaching do for me?"

They try to put the responsibility on you and I see a lot of new coaches and some seasoned coaches get caught by this. Don't fall into this trap.

- A Gentle approach to Stay in your Authority would be if

  They ask: "What will you do for me?"
  You respond: "I don't know, that's going to be up to you…"

- **A more Direct Approach** could be if

  They say, "What will you do for me?"
  You respond: "If I were willing to work with you, it's not about what I'll do for you. It's about you showing up for what it is you really want. So tell me, how committed are you?"

Requirements

You may choose to set up specific requirements before working with someone based on what will serve them.

To find out if it would be helpful to set up requirements and you're unclear, you can ask them this and check in with yourself based off their response:

- "What would have the potential to get in your way?"

Some examples for how you can set those requirements up are:

- "If we were to work together, I'd have some requirements for you. One, is that you be 'all in' for (whatever the project is they say they want support with) because I know that's what will serve you. This half-in, half-out dance is holding you back and if you want change, I'm here to help you take a stand and really go for it."
- "If I were going to coach you, a requirement I would have for you is that you be willing to take consistent action even when that pattern comes up. Are you willing to do that?"
- "If I were going to take you on as a client, fear of rejection can't be an excuse. It can still be there, but you can't let it hold you back. Are you willing to commit to taking consistent action and work with the material that comes so you can get free and live the life you want to live?"

Handling Various Responses to the Offer

It's a, "Yes!"

Get Ready to Launch

- Get out your calendars and book your launch date right then and there.

  Ask them, "Do you have your calendar now?"
- Don't wait to book the first session, unless there's a good reason to.
- If you need to start much later, like 3 weeks or more, I suggest having them put down a deposit to hold their place on your calendar. And, this is a personal and intuitive call.
- Make sure they're clear how you handle payment. You can say something like:

  "Payment can be handled by sending a check before we start" Or...
  "Please bring $x amount to our first session."

If they say yes, but you don't hear from them

*If any concerning material comes up after they've said yes, or if they have questions about fees, etc., get them on the phone. Lots of misunderstandings can happen in an email and you want to avoid that.

Dear X-

Let's jump on a 20 minute call.

Here are options:

X

X

Do one of these work for you?

Warmly,

You

Other Responses

If they have concerns or questions, you ideally want to address those in the room with you in the Clarity Session then vs them calling you later with second thoughts. You want to leave them in the possibility of their dreams, rather than focusing on their obstacles or whether or not they can afford it.

If it's a, "Maybe"

Ideally, you want to get clarity in the room. Are they thinking:

- Do I want coaching?
- Is it worth the fee?
- Do I have what it takes?
- Is it a polite way to say no?

To find clarity, you could ask,

"Are you considering whether the program is right for you, or is it something else, like the investment?"

Response A- You may coach them to get to a Yes or a No- There will be times that you're going to lean in and support someone around the power of making a decision, whether you work together or not.

To do this you might say:

- "I appreciate noes. It's when we hang out in too many maybes in our lives that there's an opportunity. I'm here to support you in whatever is true for you, if you want that..."

Some ways you can help them make an informed decision is by asking them:

- "If you decide to do this now, how does it feel?"
- "If you don't decide to do this, how does it feel?"

If you sense they're leaning towards a "no," you can coach them to say no. You might say:

- "You don't need a coach. You can do this on your own. Take it as far as you can and when you get stuck, let me know and we'll go for it."

Response B- You may withdraw the offer- In these cases if they can't make a decision, it serves them to make the decision for them by removing the offer.

You can say:

- "It's a no for now."
- "I'm withdrawing the offer. My sense is this isn't the time for you and that's totally ok…"
- "I don't want to keep you hanging out in doubt. If you aren't sure right now, that means it's a 'no,' and at some point in the future, if you want to work on this, let me know and we'll get started."
- "It won't serve you to strengthen this pattern of doubt and not make a decision. Since you're not 100% in, I'm going to support you by withdrawing the offer."

Response C- You may create a 2nd session for them- It is rare that I would do this with an indecisive client, but you may choose to and in another video I'll get into the specifics of when I would offer these.

You might say:

- "My sense is there is more in here for you and I'd be willing to make myself available for a 60 min session because I see xyz for you. By the end of that session, we'd be clear around what's best for you moving forward."

Response D- There'll be times that you'll say, "Take all the time you want…" and just let them go. In these situations, don't hold on, just simply move on.

It's a, "No"

Always meet their "No" with acceptance and openness. This isn't about talking someone out of their no. The opportunity is when they want coaching, but something else is coming up to prevent them from moving forward and they want support clearing it.

There are 3 types of Noes you might offer coaching around:

No #1. "**No for now, but maybe later."**

In this situation, you just want to make sure they know you can't guarantee where you'll be with pricing, availability, etc. They're welcome to be in touch, but this way they're not expecting the same offer later.

- "Take as much time as you need. If I'm full then, I can refer you to another great coach."
- "I hear you that now isn't the time for coaching. When you're ready to create "x" in your life, let me know and we'll get started. In the meantime, I'll send you a book that I think will really support you."

No #2. - The**, I don't think I can do it….** I don't believe it's possible for me or I'm not capable, kind of no. This is a great coaching opportunity to support them in knowing what they're capable of, beyond that belief, if they want support in this way.

No # 3. Then, we have the, "**I want to do this but I can't afford it"** kind of no.

In this situation, you want to first make sure that they really want coaching. You could ask:

- "Is this something you really want? If so, is money the only thing in the way of you not moving forward with coaching?"
- "If someone gave you "x" amount (price of your fee) would you be investing in coaching?

If yes, you may respond in one of two ways:

Option A. Coach them to know their resourcefulness

Option B. Create A Smaller Package

Option A: Coach them around their Resourcefulness

If they do want coaching, and you're clear that it's really about not having the money, then you may choose to support them around their resourcefulness. With permission, you could either do it right then and there in that session or you may create a second session for them around this. If you do this, you'll want to make sure that they don't feel defensive. You can say:

- "If you really want this and money really is the only thing in the way, I'm willing to have a conversation with you about creating the resources. Not necessarily so that you hire me, but so that you see and experience how capable you are."
- "Let's put more time on the calendar. I'm willing to create another session to support you in knowing how you can create money in your life, if you want that. I don't want you walking away from this feeling disempowered thinking you can't."
- "I believe in your strength and abilities to create money for yourself and I want you to have an experience of your own resourcefulness, if you want that. I'm willing to have a conversation with you about creating the resources and it doesn't mean you have to hire me. Is that something you'd be interested in?"
- "Let's put coaching to the side for a moment. If you really want support around this, I'm willing to coach you right now regardless of if we work together or not..."

Questions You can Ask to Help Them Identify Their Resourcefulness:

- What are your reference points for creating money in your life so far? Tell me about times you had to generate money...what did you do? How did you do it?

- If I told you you would get a new house if you came up with $X amount in 3 weeks... What would you do? How would you do it? Help them see their options.
- If you couldn't believe "I can't" and pretended for a little while that anything was possible, how would you come up with money?
- What if you had to raise the X amount. What service would you offer? What would you sell? You want to help them see that they're empowered and have choices.

Play The Game of 20

Have them list 20 ways they could create money, if they want to - no matter how silly the idea is. List it. This helps shift the mind from I can't to I can.

Ex:

I could get a roommate

I could do x y z services

I could get another job

I could be vulnerable and real and ask X for a loan or for support

I could start a crowdfunding campaign and ask for donations

I could do a garage sale

I would feel better about having a potential client leave feeling empowered, even if that means they don't choose to move forward with coaching and I coached them to say no.

Let people leave either choosing to work with you or not, but either way from a place of power rather than from victim or doubt. Help them see their resourcefulness and you will have served them well, regardless of if they become a client or not.

Option B: Creating Smaller Packages

You could also choose to create a smaller package for them to be able to work with you.

- For example, if you typically do 4 month packages with 2 sessions a month, you may choose to alter that to a 4 month package with 1 session a month with homework in between to help them stay consistent with their goals.
- You could also offer 2 months with 2 sessions a month if that serves them more or even just do a half day. This will depend on you and what will serve them.

Only offer an alternative to your package(s) when…

a. You're looking to fill your practice.

b. You feel inspired to work with a potential client and sense that you can truly help them.

c. Most importantly: The reason your potential client can't commit to your package is money related, not fear related.

I suggest letting them know this isn't the way you typically work. If you are willing to offer this, then I would only offer it to them now and not let them "think about it later". You could say:

- "I don't typically do this, but given who you are, I may be willing to offer you a smaller package. If I did, and I ask that this be confidential, would that be something you'd move forward with today?"
- "If I were to make an exception, and I offer you a 3 month package for "x" is that something you're prepared to move forward with?"
- "Given what you've shared, if I were to be willing to make an exception for you and create a smaller package to serve you at my same rate, is that something you would be interested in hearing about?"
- "If I were to be willing to make an exception for you and create a payment plan, is this something you are prepared to say yes to today?"

If their response is a "no," this tells you it's not actually money in the way and you could say:

- "Great, so now we know it's not money that's in the way…"
- "So, it sounds like you're not ready to commit to coaching?"

You then either work with the deeper thing, or just withdraw the offer.

Self-Assessment Guide

Here are some questions you can ask yourself to help you learn from your experiences as you go:

1) Did I help them connect the dots in the session so they could see clearly what's possible if we worked together over a longer period of time? Or, was it too focused on the problem at hand?

2) Did we identify a project that was worth the investment of time and money?

3) Did I demonstrate value or did I just talk about it?

4) Did I share stories about what happens when people invest in coaching?

5) Did my enthusiasm over-ride theirs or did it support theirs?

6) Did I hold back? Was there something that I wanted to say and didn't? Was I attempting to please them or was I honest and courageous?

7) Did they hold back? Did I have a sense they didn't share a worry or concern with me?

Handling Payment + Policies

You can handle payment in whatever way feels right for you. Here we'll cover payment in full up front, using payment plans, and Third Party Payers.

Payment in Full up Front: The main reason you would do this is to support someone in being 'all in'. Payment up front helps people commit and not have to rethink it each session.

If they can't make payment up front, and you want to work with them and you know it's not about money, you can say:

- "If I were to make an exception for you and allow you to make 2 payments, are you prepared to say yes today?"
- If they say let me think about it, then you say "It sounds like you're not ready to say yes. Is that right?"

Payment Plans: This can be a good option for new coaches because it creates one less barrier to creating a client.

- Be clear with the dates for which payments are due in your policies form.
- Have payments be up to date, meaning that the payment is due before the current session so you're not collecting on sessions already past.
- Make sure that both of you sign and get a copy of the policies form with payment outlined in there.
- You could also have clients write post-dated checks.

3rd Party Payers:

- Set up clear agreements and boundaries in the beginning.
- With companies or parent-child relationships, you want to be clear around confidentiality and how payment will be handled so there aren't any hiccups later.
- Make sure your client has 'skin in the game' so they show up fully.

Policies + Agreement

- These forms essentially outline:

  Your cancellation policy.
  How you handled payment + when.
  How often sessions are.
  What your availability is.
  It outlines confidentiality, the nature of the work, and mainly clarifies things upfront so there are no unspoken expectations.
- There are some example agreement forms in the Resource Center from the International Coach Federation for you to make your own.
- There are also suggestions for places to get liability insurance if you'd like that for your coaching business.

Bonus Material!

How To Re-Enroll a Client:

When your coaching package with a client is ending, but you'd like to continue, you have an opportunity to do a new Clarity Session with them (assuming you're not in a monthly retainer and it's only been a month).

You may add on the extra time to explore where they are now, what they have learned, help them acknowledge all they did, and then see what's next. Another session like this, primarily step 3, will help them see what's next and also explores what might be possible if they were to continue.

I've heard many stories where clients thought they were completing and then decided to continue based on the power of the new Clarity Session, so you never know.

Prepare for the Clarity Session:

1. Let them know when they have two sessions left.

2. If they want to explore what it would look like to continue working together, or, if you sense there is more you can support them with, you can say this…

   a. "How about this, if it would serve you, I'm willing to add time to our last session to set you up with what's next and, if in that session we discover you're wanting more support, we can explore it then. Would that be of interest to you?"

   b. "Do you want me to add an additional 45 minutes to our last session to explore what it could look like if we decide to continue working together?"

3. If you do move forward with another Clarity Session, ask them to come prepared having reflected on a few questions, here are some suggestions (you can also use these as a way to complete with a client in a final session):

   a. What's different in your life, both internally and externally?

   b. What do you appreciate about yourself and how you've grown?

   c. What have you learned?

   d. What would you love to cover in our session of the package?

   e. What's next? What do you see as possible for ___(whatever you've been coaching them with)?

Help them acknowledge all that they have accomplished, while powerfully setting up the context for what's next.

1. Spend time considering what will serve them most in the last session of the package:

   a. How can you powerfully serve them where they are?

   b. What didn't you cover? What were you afraid to bring up?

   c. What do you think is next for them? How do you see yourself supporting them with that?

And then create the deepest, most powerful session they've had.

I personally won't take on a client for another package unless we dive into a new area of their life or we 'up' the game. I don't want either of us getting too comfortable in roles since that's not where transformation happens.

If you were to re-enroll a client, I recommend setting new agreements:

1. Give them the opportunity to articulate what they see as possible for themselves if they were more 'all in.'

   a. "If anything were possible, what would you want to accomplish next?"

   b. "How would you be willing to show up in a way that you didn't last time?

2. Then, call them forward into those goals. Look for the deeper goal, what they really want, and use that to set new agreements.

   a. "Great. So, if we were to work together again, these would need to be the new requirements…"

   b. "In service to your growth, if I was going to coach you again, we would need to establish new agreements..."

Other times, you'll just intuitively know it's done. This is beautiful. Trust that.

1. This allows for new energy. Your client has the space to learn from new coaches or to be on their own and test out what they've grown into. You also will have the space in your calendar for new energy and clients.

2. They may come back later when they have another big project. Stay in the flow.

3. You may not want to continue. There's no need to feel guilt about feeling complete. Make sure they're set up for what's next, maybe with a program, a book, or another coach you recommend.