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RESOURCES & TEMPLATES SECTION

Time Management

[Priority & Time Management – How to Get More Done Without Going Into Overwhelm](#)

[Exec Summaries-Life Matters \(Time Management Strategies\)](#)

[NYT – Smarter Living- Productivity Isn't About Time Management It's About Attention Management – The New York Times](#)

[Task Focus Filter](#)

Foundation

[One Page Strategic Business Plan Leapstart](#) – from Leapstart Program which looks out 18 months

[One Page Strategic Business Plan](#) in PDF or [One Page Strategic Business Plan](#) in Word format- for your annual plan

[My Strategic Business Model](#)-This looks at various different models that coaches can use within their business

[Compelling Purpose Workbook in Word Format](#) or [Compelling Purpose Workbook in PDF Format](#)

[Compelling Purpose Visualization](#)

[Values Clarification Exercise](#) in PDF format and [Values Clarification Exercise](#) in Word format

[Saboteur Clarity Tool](#) in Word format and [Saboteur Clarity Tool](#) in PDF format (updated 6/2020)



[Tracking spreadsheet for clients hours and payments](#) Sample spreadsheet to use to track client hours and payments on monthly basis

[Coaching Agreement sample](#)

[Completion](#) Word Doc and [Completion](#) PDF – This document has some suggestions on how to prepare and move through your completion call, including a template of questions you can ask to move through the completion.

Creating a Compelling Client Experience [Word doc](#) and [PDF](#)

Niche & Ideal Client

[Niche in a Nutshell Training](#)

[Niche-in-a-Nutshell-Powerpoint-Slide-Deck](#)

[Divine Ideal Client Clarification PDF](#) or [Word](#)

[Sample Divine Ideal Client PDF](#); [Sample Divine Ideal Client Word Version](#)

[Personal History Exercise PDF Format](#) or [Personal History Exercise in Word Format](#)

[COI Interview Guide PDF](#) or [Word](#)

[COI Tracking Spreadsheet](#)

[Centers of Influence Interviews information PDF](#) or [Word](#)

[COI Summary of Findings PDF](#) or [Word](#)

[Sample – COI Summary of Findings in Word Document Version](#) or [Sample – COI Summary of Findings in PDF](#)

[COI Follow Up Guide PDF](#) or [Word](#)

[Sample COI Interview](#)

[Sample White Paper – “Challenges Facing Women Physicians”](#)



Branding & Messaging

Framing Your Unique Value Proposition Word version or Framing Your Unique Value Proposition PDF version. NOTE – This was recently separated out from the Positioning to Your Ideal Client document

Positioning to your Ideal Client Word version or Positioning to Your Ideal Client PDF version. NOTE – the first section of this document on Compelling Value Proposition was recently separated into its own document listed above

My Zone of Brilliance in Word format or My Zone of Brilliance PDF format

Choosing a Color Palette-This will help you navigate choosing your Color Palette for your brand

Walk the Process Exercise

[Sample Process](#)

Creating a Marketable Program-This details the methodology around creating your packages for your program

My Brand Story Training – on how to use and fill out the My Brand Story document

My Brand Story worksheet

My Brand Story – Word or My Brand Story – Writeable PDF (you will need to download it to make it writeable)– This is a 2 page 11×17 document that brings all your Branding Elements together.

My Brand Story Guide Word version and My Brand Story Guide PDF version – this is the guide that will walk you through how to fill out the My Brand Story document.

Article on Determining Pricing of Your Packages/Marketable Program

Linked In Profile Best Practices Updated 8/21/19

Marketing / Biz Development



[Business Development and Marketing Plan Made Simple](#) – handout and accompanying video (video under [Business Development Strategies](#)).

[6 Email Scripts To Land Clients Quickly](#) – This has 6 outlined groups that you can email to immediately get prospects into your business. It has customizable templates for you to use to connect with these groups

[Marketing and Business Development Strategies for Coaches](#) – Formerly known as *Conversational Truth Guide Marketing and Business Development Strategies*. This document goes along with the below training and lists out many of the most popular and successful strategies for coaches. This is meant to be a list to peruse to see which strategies potentially resonant with you for your Strategic Business Plan.

Business Development Strategies for Conversational Truth Guides Training

Determining Your Coaching Capacity Training

-Accompanying [chat from training](#):

[PowerPoint of the presentation](#)

Pipelines Training:

[Example Pipeline](#) This is an example of a pipeline to support the 2-3 primary Business Development Tactics/Strategies you choose.

[Blank Pipeline](#) This can be used to help sketch out your Pipeline for your primary Business Development Tactics/Strategies. This was created in Mindjet and I can provide a mindjet file. You may just want to create one something like this on paper by hand.

[Example Online Marketing Pipeline Sequence](#) – This is an example if you wanted to focus on selling programs and products online. This is discussed in the Pipeline Training.

[Sample spreadsheet to calculate clients and revenue](#) – This is a spreadsheet to project your revenue and capacity with your various offerings

[Launching Your Engagement Strategy Word Version](#) and [Launching Your Engagement Strategy PDF Version](#) – This goes into the development of your Engagement Strategy to your Network and Email List, as well as sample emails to send as your inaugural emails. And here is a spreadsheet to track your individual



[reach outs to stay in meaningful dialogues 1:1](#) [Sample Engagement Strategy Spreadsheet PDF](#) [Sample Engagement Strategy Spreadsheet Excel](#)

[2020 email marketing calendar from World Data](#) This is a calendar of Top, Average, and Poor performing dates for email marketing in 2020 based on the analysis of 40,000 email campaigns sent the previous year. Take this with a grain of salt. I would avoid the Poor performing dates and aim for the Top, but don't avoid sending on an average day if it is important and time sensitive for you. If you are doing a launch, it would be good to plan the launch based on some top performing dates 7-10 days before your launch.

[Marketing Foundation for Archetypes](#)

[Credibility Marketing Timeline \(from Leapstart Module 5\)](#)

[Social Media Monthly Strategy Doc Word Version](#) or [Social Media Monthly Strategy Doc PDF Version](#) This is a template to document your social media strategy for the month, if this is an integral part of your marketing strategy

[Nailing Your Breakthrough Sessions Workbook \(AKA Sales or Enrollment Conversations\)](#)

[Client Enrollment: Getting to a Powerful Yes! Training Part 1](#)

[Powerpoint for Getting To a Powerful Yes Part 1](#)

[Client Enrollment: Getting to a Powerful Yes! Training Part 2](#)

[Powerpoint for Getting to a Powerful Yes Part 2](#)

[Effective Presentation Strategies](#) -This details how to develop a talk as well as best practices for preparation and doing talks/presentations

[Crafting a Compelling Signature Talk Training](#)

[Crafting a Compelling Signature Talk](#) – PowerPoint that goes along with the [Crafting a Compelling Signature Talk Training](#)

[Sample Participant Feedback](#)

[Effective Presentation Checklist](#)

[Effective Presentation Purpose Outcome Plan](#)



[Sample Signature Talk Description](#) To be used to help book speaking engagements and help organizations promote your event

[Asking For Referrals](#)

[Sample Proposal – for corporate coaching or consulting engagements](#)

[Facebook-Ad-Template](#)

[Strategic Alliance Exploratory Meeting Interview Guide – Word Version](#)

[Strategic Alliance Exploratory Meeting Interview Guide – PDF Version](#)

[Savvy Strategic Alliances Training](#)

[Sample Independent Contractor Agreement](#)

Website Development

[Creating Captivating Websites](#) in PDF [Creating Captivating Websites](#) in Word
Updated 3/2021

[Homepage Copy Template](#) in Word [Homepage Copy Template](#) in PDF

[How to Choose a Shopping Cart Solution For Your Website](#)

[Email Autoresponder for Free Gifts](#) – this gives templates for emails for the “autoresponder” for when people opt in to your free gift on your website

[Beginner’s Guide to Merchant Accounts](#)

[Testimonial Template](#)

Programs & Events

Online Events / Telesummits:

[10 Week Launch Plan](#) – for launches of programs, telesummits or workshops

[Speaker-Agreement-and-Media-Release](#) sample for telesummits and podcasts

[Speaker-Call-Sheet-Example](#) for telesummits and podcasts



Promotional Packet Example for Telesummits and Launches

In Person Events:

Creating KickAss Retreats Training

Handout: Creating KickAss Retreats

Signature Talk

Effective Presentation Strategies -This details how to develop a talk as well as best practices for preparation and doing talks/presentations

Sample Participant Feedback

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Sample Signature Talk Description To be used to help book speaking engagements and help organizations promote your event

Crafting a Compelling Signature Talk Training

Crafting a Compelling Signature Talk – PowerPoint that goes along with the Crafting a Compelling Signature Talk Training

Creating Engaging Webinars Training

Handout: Webinar Training

General

Client Resources Table of Contents - this outlines every section and the templates, resources, trainings, etc. available in each section

Entrepreneurial Edge Coaching Program Action Plan (Excel version [here](#)) updated 3/3021. This has every major action to move through the Entrepreneurial Edge Coaching Program. You can add your particular actions, as well as modify or eliminate actions that don't resonate for you. This is the overall roadmap but we can change YOUR route to make sure it works for you.



[pre-coaching session reflection and update](#)– updated 6/2020

[Peer-Coaching-Intro](#)-This is if you decide to choose someone in the group to do peer coaching with. (it's not a formal part of the program but I'm happy to help find someone who would be a good peer coach for you!)

[Entrepreneurial Edge Coaching Program Directory](#) – updated 7/6/21

[Resources document](#) – this has the various different service providers, technology options, etc that I recommend (updated 7/1/21)

[Tracking spreadsheet for clients hours and payments](#)– This is a tool to track and forecast the number of clients based off your business development strategies

[Year End Exercises](#)