



The **ULTIMATE**
COACHING
Planning Guide



SHAWN BROOKS

INTRODUCTION

What's the most powerful way to learn new business strategies and increase your bottom line?

A high-end, private coach can not only offer insights into new marketing, branding, systems, and business improvements, but they can also serve as a second set of eyes on your existing plan. Because they've been where you are, your coach is an invaluable resource as your business grows.

And to someone else, YOU are that coach. So what's stopping you from rolling out your own premium 1:1 coaching program?

If you already have a group program or several stand-alone training programs, then a 1:1 package is the next logical step, and it won't take much work to create.

In fact, one-to-one coaching is the ideal "top of the funnel" offer. Once your clients have worked through—and benefited from—your free content, group offers, and one-off training programs, they'll be clamoring for more. What's more, they'll already know your value, and they'll be more than willing to pay for continued access to you.

Even if you don't yet offer any group coaching, your own business experiences make you the perfect person to work with other up-and-coming businesswomen in a one-on-one basis. Just consider how much time you currently spend advising people (probably for free) via email and social media and phone calls and texts.

Clearly you have what they want. Now it's time to formalize your coaching package and make it available for sale.

Here's the real beauty of private coaching though: you can make a real impact on the lives of those you coach.

With group coaching or self-study programs, it's difficult to know how many people are actually putting your expertise to work for them. In a private coaching program, you'll be connecting with clients one-on-one, and you'll see exactly what's providing the biggest results.

It's a highly rewarding relationship not only for your clients, but for you as well.

STEP ONE: GET CLEAR ON THE PROBLEM YOU SOLVE

Just as with every aspect of your business, your private coaching package—if it's to be successful—must be highly targeted. You cannot simply hang out your virtual shingle, call yourself a coach, and expect clients to line up for an appointment.

Instead, you must position yourself as the expert you are. And since you're not an expert in everything, that means getting crystal clear on exactly what you do (and who you do it for).

When you can clearly articulate the exact problems you solve and who you work with, it will be much easier to find your tribe and attract buyers for your program.

For example, business coaches might focus on solving:

- Money mindset issues for women entrepreneurs
- Brand development for health and wellness coaches
- Marketing help for information product sellers
- Outsourcing issues for online businesses

Life coaches solve different issues. Dating coaches have their own area of expertise. Executive coaches focus on C-level employees.

You have your sweet spot, too, and it's probably easy to identify.

You already know your general area of expertise, whether it's business, life, health, finance, or other niche. Now think about who your favorite clients are. And if you don't yet have clients, think about those you've helped in the past in any way—even if it's through email or on social media.

Who did you most enjoy working with?

Which problems were you happiest to solve?

Which issues (and people) left you feeling frustrated and stressed out?

The clients and contacts you love the most—the ones whose emails you answer immediately and whose phone calls you pick up on the first ring—are your tribe. This is the client you’re building your 1:1 package for.

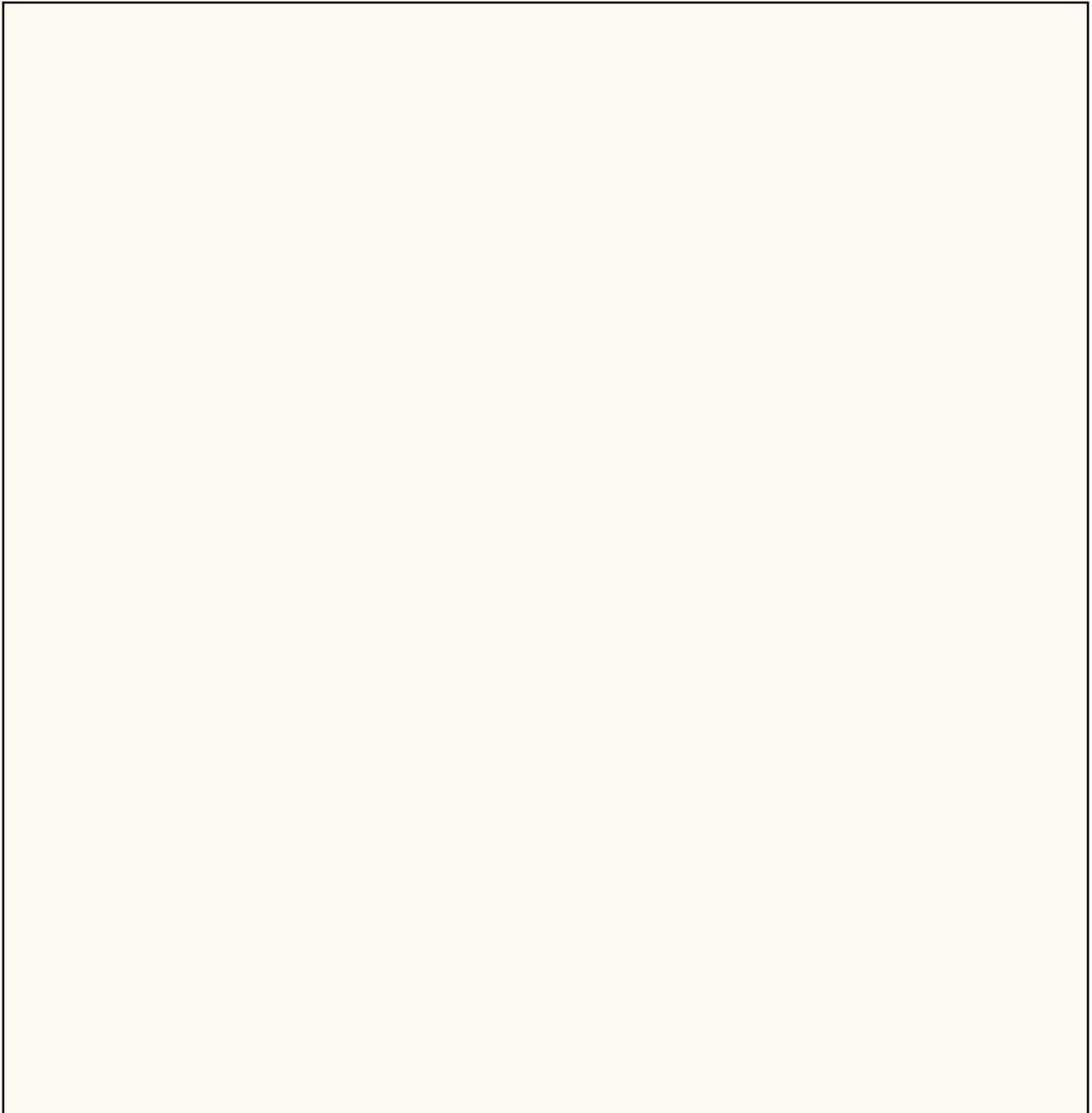
Next, consider what this client’s biggest issue is. One top business coach calls this “the bleeding neck.” It’s your ideal clients most pressing problem, the one they most need to solve, and the one they will gladly pay to fix.

Maybe their blog doesn’t get enough traffic. Perhaps their online dating profiles aren’t attracting their dream man. Or maybe their personal finances are out of control.

Whatever the problem is, you have the answer. And when you can craft a coaching package that gets results for your ideal client, you’ll have a winning program that people will line up to enroll in.

Exercise: Describe Your Ideal Client

If you haven't already done so, spend some time clearly defining your ideal client. Describe everything you know about them, including their experience level, their dreams, their family life, their frustrations, their income, and anything else that will set them apart from millions of other potential clients. (Use additional sheets if needed.)



Exercise: State Their Biggest Problem

Now that you know who your client is, define—as concisely as possible—the big issue you’re coaching will solve for them. (e.g. “They struggle with self-esteem and lacks the confidence to fully market their business.”)

STEP TWO: ESTABLISH YOUR DESIRED OUTCOME

Knowing what problem you solve (and for whom) is the first step, but this alone won’t sell your program.

For that you need to know what outcome your clients will achieve.

If you’ve ever written a sales page, then you’re familiar with the concept of features vs. benefits. Features describe the product. Benefits are the outcome.

A feature of a showerhead is that it’s “low flow.” The benefit is that you save on your water bill.

A feature of your new curtains is that they block light. The benefit is that you can sleep in on the weekends.

A feature of your coaching program is that you are an expert in [YOUR NICHE]. The benefit is the outcome your clients will experience.

When you’re thinking about the outcome you promise, try to see it from your potential client’s point of view. They have a problem. They’re in pain. They’re struggling to find a solution.

Ask yourself what their life or business will look like once they complete your program.

Will they make more money? How much? In what time frame?

Will they find their dream date? Get engaged? Married? How soon?

Will they grow their email list? By how much?

This big benefit—or desired outcome—is what will sell your coaching program. It's the light at the end of the tunnel that your ideal client is stuck in, and as such, every aspect of your coaching program should lead in this direction.

Now, of course you can't just make empty promises, so it can feel pretty challenging to create the desired outcome of your coaching package. Good case studies and testimonials—and even your own experiences—can help.

Look to your past clients and their achievements. What have they gained as a result of working with you? Chances are you have some testimonials you can turn to for details, but if not, don't be afraid to reach out to them to ask about their results.

Pro Tip: Create an "exit interview" as a part of all your training programs—both group and 1:1—so you can find out about results, ask for testimonials, and make improvements to your programs as well.

Exercise: State The Outcome Your Clients Will Achieve

As with your problem statement, use this space to get clear on the desired outcome of your program. (e.g. "My clients learn to dramatically scale their marketing efforts to triple their income within a year.")

STEP THREE: PLAN YOUR PLATFORM

Big breakthroughs don't happen overnight, and they don't happen by chance—as your clients have no doubt discovered by now. In fact, your ideal client has probably been struggling for a while. They read hundreds of blog posts, watched dozens of webinars, attended conferences, read books, listened to podcasts, purchased other trainings, and still, they got this problem.

To achieve big results, they need a focused, step-by-step action plan, and the best 1:1 coaching programs are designed just that way. They guide the client logically through each step in the process.

For example, a coaching program designed to help freelancers get started online might include:

- Developing service offerings
- Ideal client discover
- Pricing packages
- Creating a website
- Keywords and SEO
- Developing a sales funnel
- Creating contracts
- Marketing methods
- Sales calls

As you can see, each of these pieces is necessary, and many are dependent on one another. You cannot market your website if it doesn't exist yet. You can't work out pricing if you don't know what services you offer.

Your coaching program will very likely benefit from a logical flow as well.

Keeping your desired outcome as well as your ideal client in mind, think about where they are right now in business and life, and where they are going (with the help of your coaching). Then draw the map to get them there. This is the flow of your coaching program.

At this point, you may want to begin thinking about how long your program will last. One-to-one coaching programs range from a few weeks to a year or more, depending on the depth of the information and the outcome clients will achieve.

Realistically, how long will it take for your clients to work through the steps? Be sure to consider outside influences such as:

- Day jobs—if your clients are building a business while still working outside the home, it will reduce the amount of time they have available
- Family obligations—toddlers in the house, summer vacations, elderly parents and a host of other life events can limit the time a client can dedicate to your program
- Development time—websites aren't built in a day. Webinars aren't developed in a few hours. Sales funnels are not built in an afternoon. If your program includes elements that take time, consider extending the length of your coaching to accommodate them.

In step five, we'll talk more about contact access and frequency, but for now, simply start considering how long your overall program will be, and what the steps to completion include.

Exercise: Brainstorm Your Coaching Steps

What do your clients need to learn so that they can achieve your desired outcome?
Spend a few minutes creating a list, and then organize it in a logical order.

In what order should your clients cover the topics listed above?

Blank area for writing the order of topics.

Exercise: Plan Your Program Duration

How long will it take your clients to work through all the steps above?

Blank area for writing duration (weeks/months/years)

STEP FOUR: DESIGN YOUR COACHING TOOLS

The best 1:1 coaching programs not only follow a proven format, but they offer more than phone calls and Zoom meetings as well. Consider offering:

- Additional reading material (books, ebooks, blogs, etc.)
- Video—either for training purposes, to illustrate a point, or to offer inspiration
- Audio content
- Checklists
- Worksheets
- Templates
- Even simple printables to help illustrate ideas and concepts

Many of these you can easily repurpose from your own business. For example, if you have standard operating procedures or set up checklists that would be beneficial to your clients, rebrand them and offer as PDF downloads.

You can also create a reading list of your favorite books, compile a list of useful YouTube videos, or package up your email canned responses to share.

Worksheets that offer fill-in-the-blank questions can help your clients work through complex or confusing processes, and will serve as a reminder in coming weeks or after their coaching program is completed, so they can continue to benefit.

Another option for high-end coaching programs is to send your clients physical books that will help with their growth. One popular dating coach sends each of his clients a copy of “Attached,” by Amir Levine because he feels so strongly about the ideas presented in the book.

If you’ve written a book, another idea is to send clients a physical copy of your book, perhaps even customized for them, with notes in the margins or sticky notes to highlight important chapters.

Exercise: Plan Your Tools

What tools, training, worksheets and other resources will help your clients achieve their goals?

Tool	Format	Complete (y/n)	Notes

STEP FIVE: DESIGN YOUR 1:1 COACHING PACKAGE

At the heart of your 1:1 coaching package is access to you. After all, that's what your clients most want—the ability to consult with you and learn from your experiences.

So an important part of your coaching package design is to determine exactly how you'll connect with your clients, when the contact will happen, and where.

Your options here are as flexible as you want them to be, and can include:

- Email
- Phone calls
- Private Facebook group or forums
- Zoom
- Text messaging
- Mastermind group calls
- In-person, VIP days

In addition to determining how your clients will connect with you, you also need to decide how much contact will be allowed. Again, the details are completely up to you. You can offer:

- Weekly phone calls
- Monthly phone calls and daily email
- Emergency phone calls only with daily emails
- A limited number of "Urgent," on-demand Zoom chats
- Monthly mastermind group calls + private calls
- Monthly Zoom calls with text messaging for emergencies

And here's a tip: Daily access via email is an extremely valuable benefit... and very few people will actually use it. Making yourself available to clients in this way will make them feel special, and you will (naturally) answer their questions when they ask, but your workload will be limited since so few will take advantage of the offer.

The bottom line here is just this:

What will make your clients feel supported, without causing you to burnout?

That's the contact frequency and format you should aim for.

In addition, consider how your clients will contact you. You probably don't want to give clients your home or cell number, so consider a conference line (UberConference.com is free and easy to use) or a Google Voice number for privacy.

Email access is easy, but to keep client work organized, it may be better to set up a dedicated email address that you use just for coaching clients. This will be especially helpful if you offer something like daily email questions with a promise of a 24-hour response time. That way your important client emails won't get lost among the coupons from Target and pictures from your cousin's wedding.

Higher-touch coaching packages might offer in-person or virtual VIP days or even group retreats. VIP days can take place entirely online via Skype or Zoom, or your clients can visit you in your location (or vice versa).

Typically, a long-term coaching program might offer one or two VIP days per year. This offers an opportunity for you and your client to work hands on, side-by-side in their business or life plan. Without the distractions of home and kids, you and your client will accomplish a lot during a single VIP session.

Exercise: Decide Your Access & Availability

Contact Type	Frequency	Duration
Phone calls		
Email		n/a
Mastermind call		
Text messaging		n/a
Zoom Calls		
VIP Days		

Exercise: Create Your Private Phone Number & Email Address

Coaching Phone Number:

Coaching Email Address:

STEP SIX: DETERMINING YOUR PRICE

Perhaps the most difficult decision to make when it comes to your private coaching program is cost.

Beginning coaches in all niches might charge as little as \$97/month, while top business coaches can easily command \$40,000, \$50,000 or even \$100,000 per year. Where will your program fit? It depends on a variety of factors, such as:

- Duration. A yearlong program is more costly than a 6-week offer.
- Niche. Certain industries, such as business, can demand higher price tags than others.
- Client. Beginners will be less likely to shell out big bucks for coaching than will more advanced clients.
- Outcome. If your outcome includes an increase in profits for a business, then a higher-priced program is possible.
- Your experience level. With a proven track record of success for yourself and your clients, you can easily ask top-dollar for your 1:1 package.

In addition to these elements, consider comparable programs from your coaching colleagues. What do they offer and for how much?

Exercise: Determine Your Program Length and Cost

Note: You can create multiple levels here as well. For example, you might offer both a 3-month and a six-month program.

Program Duration	Cost

STEP SEVEN: SETTING BOUNDARIES

Even with a clear communication plan and format in place, there will be temptations—on both sides—to push the limits.

- Clients will keep you on the phone longer than you intended
- They will email you more than is allowed
- They will text you for non-emergencies
- They will send you messages in Facebook, on Twitter, on Voxer, or anywhere else that is convenient for them—regardless of your preferences

And it works both ways!

You will be tempted to reach out on a weekend to answer a question, or schedule a call on a Sunday afternoon because that's when your client is available. While you might think this is just good business—after all, you're building a relationship, right?—the fact is, it will lead to burn out. You'll always feel like you must do more for your clients, and sooner or later, you'll lose touch with your own health and personal space.

Boundaries are the answer, for both you and your clients.

Establish from the outset exactly what is included with your coaching package, and be sure to include when contact will take place. For example, you might say:

“Your coaching package includes one monthly, 50-minute phone call with me + one question by email each working day. My work days are Monday through Thursday from 10am to 4pm Eastern, and all calls and emails will be answered during that time.”

With this format, you've established:

- What the client gets (one phone call and once daily emails)
- When they get it (Monday through Thursday from 10am to 4pm)

You'll also need to establish exactly how your clients should contact you, and what will happen if they do not follow the procedures. As we discussed in the last step, it can help to set up specific email addresses and phone numbers or conference lines exclusively for your client use.

Another step you can take is to create "canned responses" to send out when a client attempts to contact you outside of your established system. For example, if you receive a Facebook message (and you don't offer this as a form of contact) you might respond with:

"Thank you for reaching out. This is a great question, and I'm happy to help you with it. For better organization of my client files, though, I do ask that you send all your questions to my email address at yourname@yourdomain.com."

A gentle reminder of the "rules" is often all it will take to establish clear boundaries, and create a better coaching relationship for both of you.

To keep phone calls from running over, a simple kitchen timer will help. At the start of the call, tell your client, "We have XX minutes today, so I'm going to set a timer for YY minutes to remind us when it's almost time to end. That will help ensure I can answer all your questions today."

Then set your timer for 5 minutes before the call is to end. When the timer goes off, let your client know you have 5 minutes remaining, and ask if they have any final questions before you hang up.

Following this simple system will prevent those endless phone calls that you just can't seem to end.

Remember though, you have to respect your own boundaries, too! Resist the temptation to allow calls to be booked outside of your working hours, or to respond to questions on the weekend, or to book additional appointments "just this once."

Doing so will make it appear to your client that your boundaries are flexible, and will invite them to push the limits as well. After all, if you email on the weekend, it must be ok, right?

Exercise: Map Your Work Hours

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							

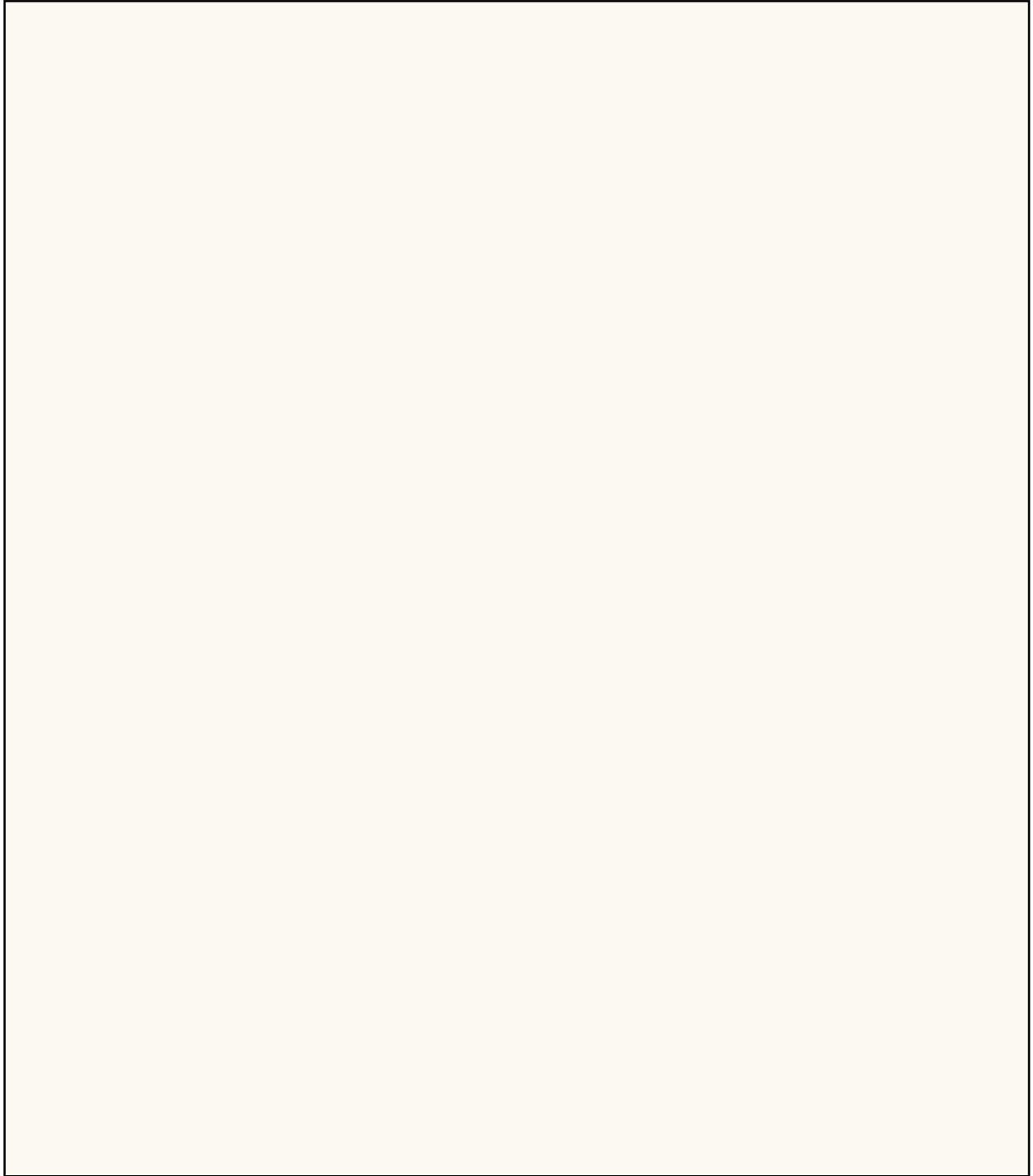
Exercise: Craft Your Boundary Responses

How will you set the expectation at the start of a call so it does not run over?

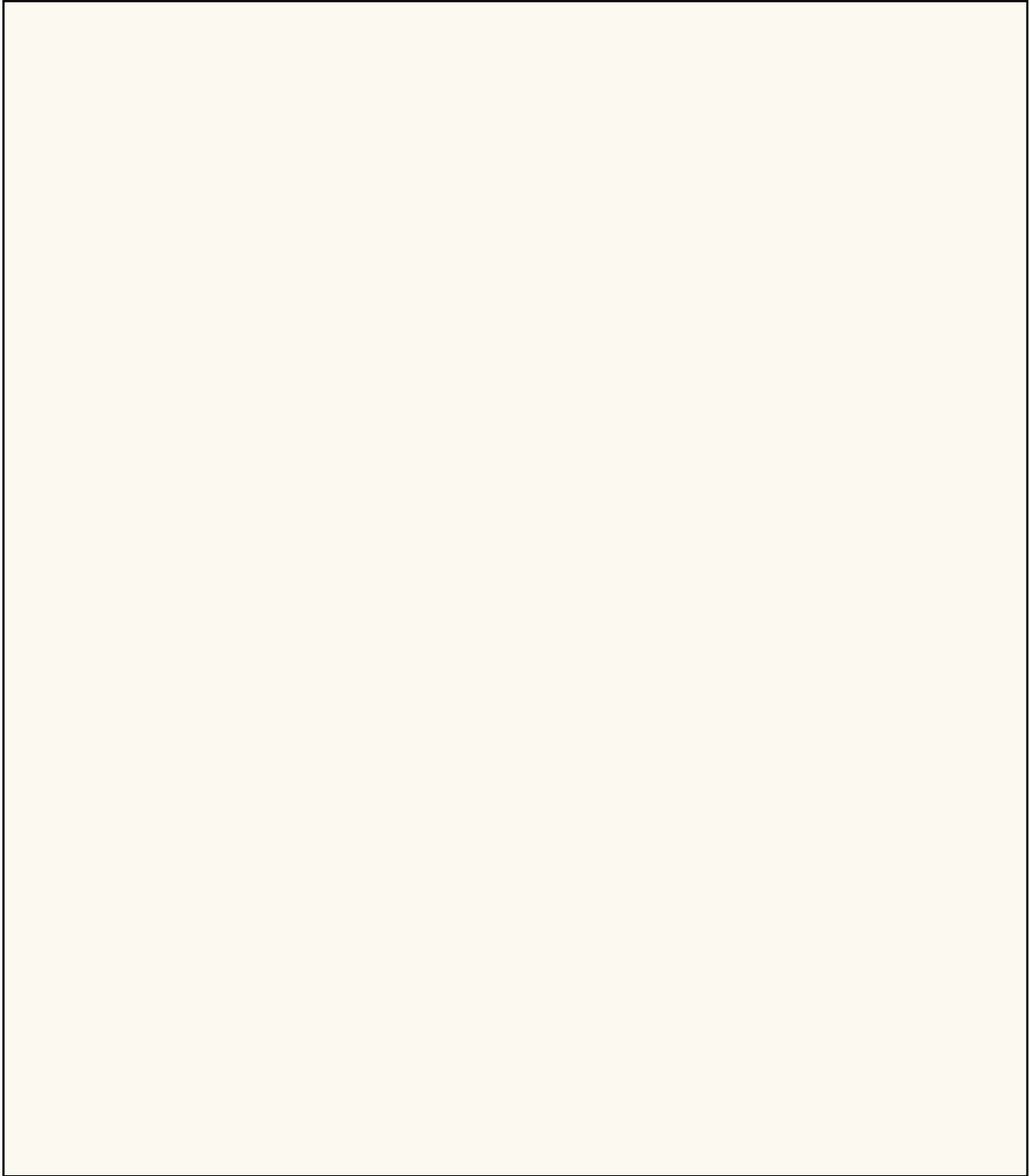
How will you respond if a client contacts you outside your established system?

What will you tell yourself when you fail to respect your own boundaries?

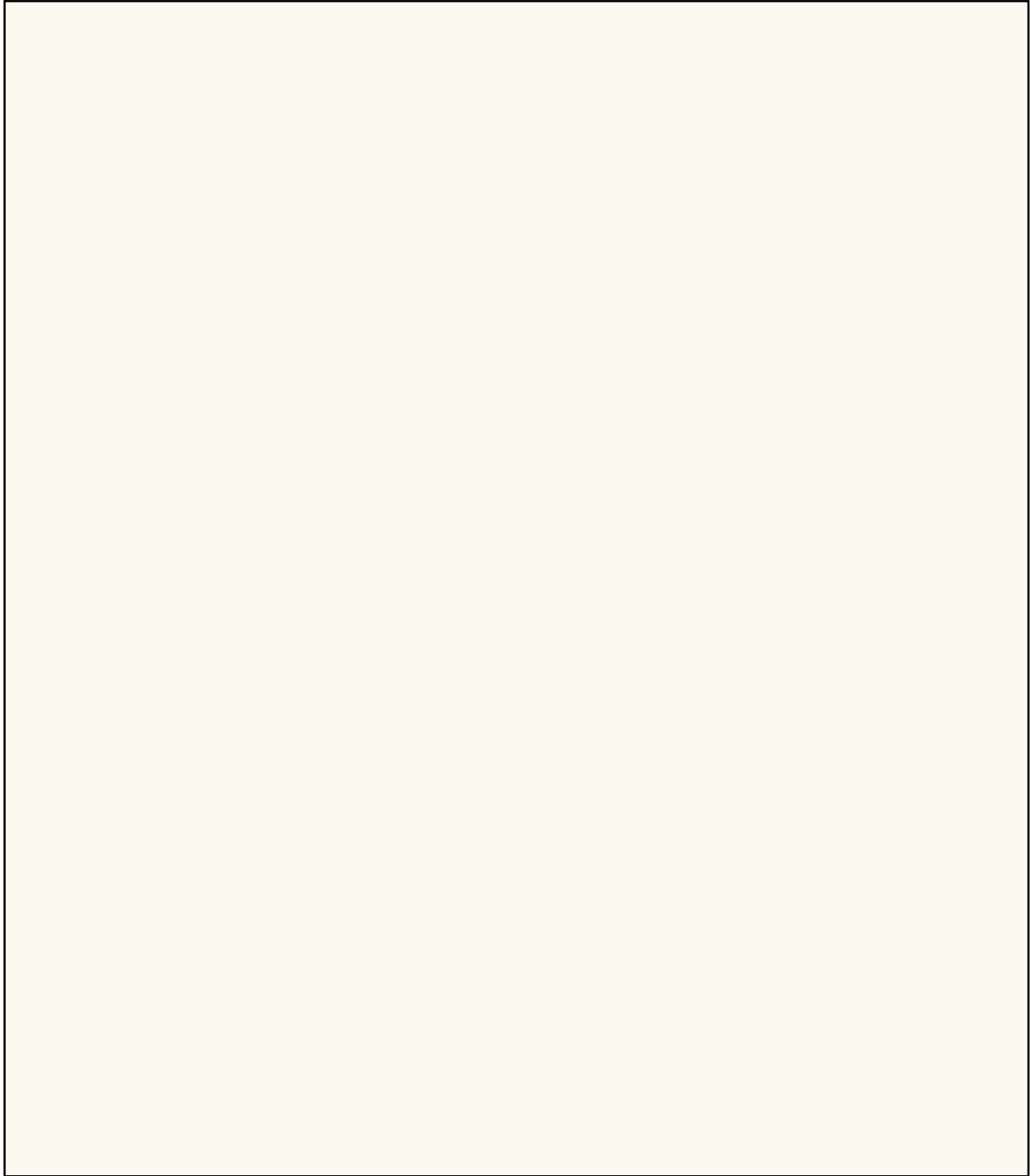
Additional Notes



Additional Notes



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Are you ready to take your business to the next level?

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Don't miss out on this opportunity to accelerate your success. *Book your consultation now and unlock the keys to achieving your goals.*

<https://shawnbrooks.com>

