

## Visioning Practice Activity

1. Close your eyes and imagine yourself working with your ideal client.
  - a. Who is your ideal client?
  - b. Do you work with individuals, groups or both?
  - c. Are your clients male or female; young or old; urban or rural; married, single or divorced; with or without children?
  - d. How did your ideal client hear about your practice?
  - e. What is the primary reason they have come to see you?
  - f. Why are they choosing to work with you?
  - g. What health problems, concerns or needs do they want to work on?
  - h. What solutions are they looking for?
  - i. What benefits do they see in solving their problems?
  - j. What are their success criteria?
  - k. Complete a description of your vision.
  
2. Close your eyes and imagine yourself working in your ideal practice.
  - a. Where are you?
  - b. Where is your practice located?
  - c. Are you in a solo or group practice?
  - d. Are you working with one individual, groups or both?
  - e. Are you working in person, by phone or online?
  - f. How big is the practice?
  - g. How busy are you?
  - h. If your practice were a color, sound, animal or piece of music, what would that be?
  - i. Complete a description of your vision.
  
3. Imagine yourself in a conversation with your future self, five years from now. Your present self asks your future self for guidance in answering the following questions:
  - a. What inspiration, dream, passion or gift do I bring to my practice?
  - b. Why do I do it? What is my purpose?
  - c. What values does my practice stand for?
  - d. What do my customers and colleagues say about my practice?
  - e. What are my success criteria?

**Business of Coaching Practice Activities**

4. Use your responses above to provide insight as you complete the following:

a. The Vision for my practice is:

b. The Values of my practice are:

## Positioning Practice Activity

People – describe your ideal client, who will buy your services or products:

Services and Products – describe your service and product mix:

Pricing – describe your strategy and pricing mix:

Place – describe where your target audience will most likely be able to learn about your services and purchase them:



## **Business of Coaching Practice Activities**

Unique Selling Proposition (USP) – describe what differentiates you from others:

Promotional Strategies – describe the marketing strategies you will use considering the three broad categories:

Active:

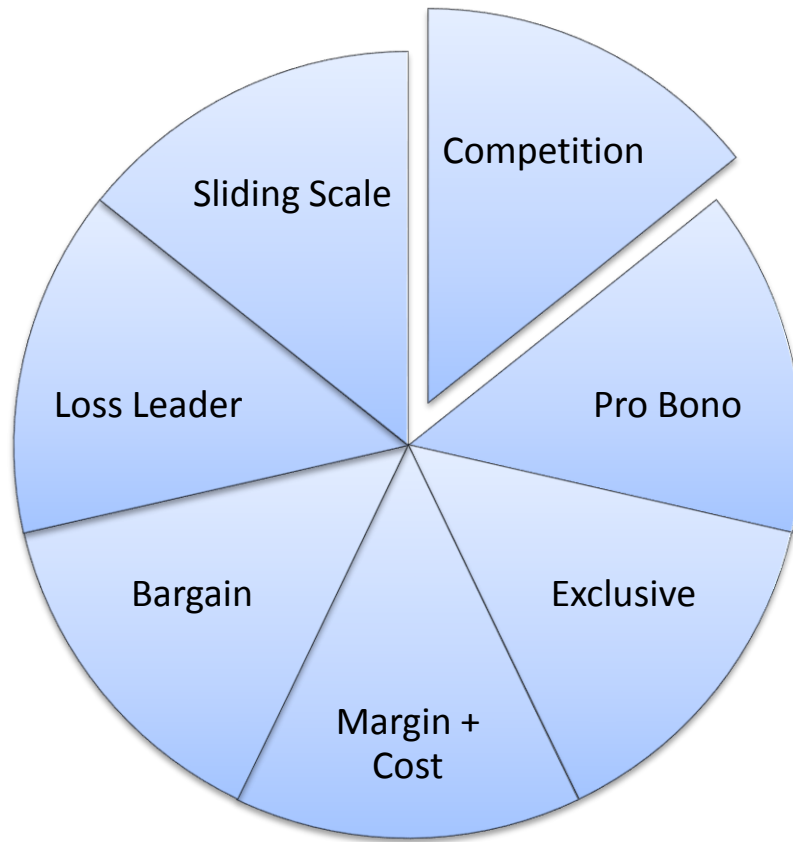
Passive:

Keep-In-Touch:

## Pricing Perspectives Wheel Practice Activity

1. Draw a circle divided into 7 sections.
2. Assign a pricing strategy to each slice:
  - a. Competition: Study the competition, see what they charge and charge similarly.
  - b. Margin + cost: Decide the profit over the cost and overhead.
  - c. Exclusive: Determine whether you offer an exclusive service.
  - d. Bargain: Decide if you should underprice competitors to establish a client base.
  - e. Loss leader: Decide if you should charge a very low, initial price to attract new clients.
  - f. Sliding scale: Note whether you will vary your pricing according to a client's ability to pay.
  - g. Pro bono: Will you offer free services and products?
3. Decide a pricing amount for each strategy and write it in the slice, if it applies.
4. Imagine posting each pricing amount on your website or in a brochure.
5. Imagine a conversation between you and your ideal client where you explain each one of the seven pricing strategies and the associated fee.

As you work through this activity, keep the strategies that most resonate with you and eliminate the ones that make you feel uncomfortable.



### Market Presence Practice Activity

To begin developing a plan for your Internet and social media market presence, complete the following worksheet to consider your strengths, weaknesses, needs and level of priority for each approach.

Internet/Social Media Approach	What are my strengths when considering this approach?	What are my weaknesses when considering this approach?	What other education or resources would I need to fully use this approach?	Rank in order of priority, with 1 being the top priority.	By what time would I like to be fully using this approach?
Website					
Blog					
LinkedIn					
Twitter					
Facebook					

## Creating a Compelling Conversation Practice Activity

Use the following outline and questions to create an elevator pitch and audio logo for your coaching business.

### **Elevator Pitch Planning**

I work with (target clients) \_\_\_\_\_

\_\_\_\_\_

To solve (biggest problems) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

They would like to have (desired result) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What makes Integrative Health Coaching different is (USP) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

This results in (changes) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

The benefit is (overall impact) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**Audio Logo Planning**

Hi, my name is (self) \_\_\_\_\_

I'm the owner of (practice) \_\_\_\_\_

I work with / I help (ideal client) \_\_\_\_\_

To solve (problem) \_\_\_\_\_

\_\_\_\_\_

This results in (changes) \_\_\_\_\_

\_\_\_\_\_

Working with me means (benefit) \_\_\_\_\_

\_\_\_\_\_

I can be contacted at (details) \_\_\_\_\_

\_\_\_\_\_

**Complimentary Coaching Consultation Planning**

Use the following questions to individualize a script for a complimentary consultation session.

**Start:**

- How is your current health situation affecting your life?
- What bothers you most about your current health situation?

**Opening:**

- How would you like things to be different with your health?
- What would an ideal health vision look like for you?
- If you had your ideal health vision, what impact would it have on your life?
- How important is this vision to you? Suggest rating from 1-10.
- How confident are you that you can achieve this vision? Suggest rating from 1-10.

**Address Concerns:**

- What are the obstacles in your way?
- What is holding you back from achieving your ideal health vision?
- What challenges are you facing in overcoming these obstacles?

**Summary:**

- This is your current health situation.
- This is your ideal health vision.
- This is the gap between your current health and your ideal health vision.
- This is what is holding you back or keeping you stuck.

**Offering\*:**

- I would like to work with you.
- I think we would make a good team or partner well together.
- Here is how I see us working together to bridge the gap between your current and your ideal health:

**Business of Coaching Practice Activities**

Describe your offering:

- **Features:** Individual: one, group, retreat; weekly, bi-weekly, monthly; email or telephone support
- **Structure:** vision or values, assessment, planning, working the plan or revision, maintenance
- **Benefits:** support, accountability, holding the space, growing edge, real time feedback, confidentiality
- **Impact:** significant change in health behaviors or significant movement towards closing the gap between your current and ideal health vision

Suggest a start date:

- Ask for a three-month commitment
- Present your fees and how you accept payment

**Follow-up:**

- Money: affirmation, exploration, alternatives
- Time: affirmation, exploration, alternatives
- Fear of change: affirmation, exploration, alternatives
- Unable to make a decision: exploration, alternatives

**Closing:**

- Summarize what you have agreed
- Next steps for the client
- Next steps for you-the coach (includes a communication confirming the outcome of the CCC)

\*If you do not think you would make a good team the offering is the place to have that discussion.

## Determining a Business Name Practice Activity

Choosing a business name is an important step in developing your practice. The name you select should reflect your business identity. You may also need to consider how your clients will perceive your business name and how it will appear in print and online.

1. To begin considering possible names, first consider the following questions:
  - a. Who are your intended clients?
  - b. What are the core values your business represents?
  - c. What is unique about the services or products your business represents?
2. Brainstorm a few potential business names that may represent your responses above. Write them down here.
3. Take note of the options you have written and which one(s) stand out the most to you. It may be helpful to have others review and comment on your top choices before narrowing your options.
4. Go to your Secretary of State, State Corporate Filing Office, to determine the registration requirements and process for your state. In many cases, the first step will be a name search to ensure the potential name(s) you have selected are not already registered by another business.

**Managing Finances Practice Activity****Permits and Licenses**

Filing fees for business name and registration \$ \_\_\_\_\_  
Filing fees for LLC \$ \_\_\_\_\_  
Business/sales licenses \$ \_\_\_\_\_  
Occupancy permits \$ \_\_\_\_\_  
Trademarking fees (if applicable) \$ \_\_\_\_\_

**Bank Account Fees (if applicable)** \$ \_\_\_\_\_

**Insurance** \$ \_\_\_\_\_

**Salary**

Coach \$ \_\_\_\_\_  
Other staff (if applicable) \$ \_\_\_\_\_  
Consultants (if applicable) \$ \_\_\_\_\_

**Professional Fees**

Professional development or training needs \$ \_\_\_\_\_  
Renewal fees for any professional licensures \$ \_\_\_\_\_  
Continuing education registration fees (if required) \$ \_\_\_\_\_

**Rent** \$ \_\_\_\_\_

**Equipment**

Phone and hands-free headset \$ \_\_\_\_\_  
Mobile phone \$ \_\_\_\_\_  
Computer \$ \_\_\_\_\_  
Computer software (financial tracking, client management, encryption) \$ \_\_\_\_\_  
Secure filing cabinets \$ \_\_\_\_\_

**Marketing**

Website development and maintenance \$ \_\_\_\_\_  
Website hosting fees \$ \_\_\_\_\_  
Business cards, brochures or other print materials \$ \_\_\_\_\_

**Miscellaneous Expenses** \$ \_\_\_\_\_

**GRAND TOTAL:** \$ \_\_\_\_\_