

**Build Your Successful Coaching Practice**  
**Action Worksheet 11: Convert Consultations into Paid Coaching Engagements**

**Objective:** Hold efficient and effective consultations that allow you to turn your steady stream of consultations into a full schedule of paid client sessions.

**1. Listen to your client's story (approximately 20 minutes).**

*I promise that I'll tell you all about my approach to coaching, and answer any questions you might have, but if you don't mind, I'd like to start by hearing your story.*

Ask questions and offer helpful observations in your usual coaching style.

**2. Help your client to begin to describe a preferred future (approx. 15 minutes).**

*As your coach, one of the things I would do is help you to clarify how you want the future to be different from the present, so that we can work together to help create a path toward that better future.*

*When you think about a better future, what might it look like?*

*What are some of the strengths and resources you could use to help make it happen?*

*Can you describe one step toward that future that might be in reach?*

**3. Discuss gaps between the present and the preferred future (approx. 5 minutes)**

*Try to imagine you're in the not-too-distant future and you've achieved what you've just described, or you've made a lot of progress toward it.*

*What had to change for you to get to that future? What did you have to accomplish, or learn, or gain clarity about or confidence in?*

*What might it take for you to accomplish or learn those things, or to gain that clarity or confidence?*

#### **4. Describe how you could help (approx. 5 minutes)**

- Brief description of your particular expertise and approach and how they could benefit this specific client.
- High level description of the steps you would take together.
- Your typical session agenda/flow.
- Support and accountability between sessions.
- Suggested plan for the first session.

#### **5. Review scheduling and fees (approx. 5 minutes)**

- Review session length and scheduling.
- Review fees and packages (practice this until you can do it without apology):
  - *Were you able to review the information I sent you on fees and packages?*
  - *Do you have any questions?*

#### **6. Invite questions and agree on next steps. (approx. 10 minutes)**

*Do you have any questions at this point? Would you like to go ahead and schedule a first session?*

Yes, let's work together:

1. *Let's agree on a day and time. I'll email you a confirmation and my coaching agreement, as well as everything you need to get ready for our session.*
2. *Which package do you think is right for you, and how would you like to handle payment?*