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Build Your Successful Coaching Practice
Action Worksheet 6a: 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 (about 25 minutes).**

   Get to know your client, and give him or her an opportunity to experience your style of coaching. Listen as you would in a regular coaching session, asking good questions and offering helpful observations in your usual coaching style.

   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.

2. **Ask about your client's coaching aspirations (about 15 minutes).**

   Learn about your client's goals and needs, and what kinds of help he or is seeking from a coach.

   Spend some time exploring your client's responses to these two questions.

   A. Imagine yourself in the near future, having worked with a coach for a period of time. You look back and conclude that this was the best thing you could have done because you got everything you needed to get from it. What would that look like?

   - This is your client telling you where he or she wants to go (**coaching goals**).

   B. What kinds of help do you think you'll want from a coach along the way?

   - This is your client telling you how you can best help (**coaching needs**).

3. Describe how you could help (about 10 minutes).

Target the discussion to how you could help with the specific coaching goals and needs your client has described.

If you'd like to work with this client, you're now able to describe your expertise, approach, and process in ways best suited to the types of goals and needs he or she has identified.

You're ready to discuss:

- Brief description of your particular expertise and approach.
- High level description of the steps you would take together.
- A more detailed plan for the first session.
- Your typical session agenda/flow.
- Support and accountability between sessions.
- Session scheduling, duration, and frequency.
- Client's questions.

4. Discuss fees, scheduling, and next steps (about 10 minutes).

Fees

The key to making this quick and painless is to be sure the client saw this information during the scheduling process and decided to meet with you anyway.

You offer a valuable service and you deserve to be well compensated for it, so 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?*

If your client didn't review the fees, or doesn't remember them, you can cover them briefly. (This will happen very rarely, if at all. People remember fees.)

That's it. There's no need to linger on this. You are a professional, and those are your fees.

Scheduling and Next Steps

Close the consultation in a way that's confident and professional, and that reflects your respect for your client as the authority about what's best for him or her.

What happens next is entirely up to you. We can schedule a first session, or you can think it over and let me know what you decide.

If your client answers "Yes, I'm ready."

- *Let's agree on a day and time.*
- *Do you know which package you'd like to choose?*
- *I'll email you a confirmation and everything you'll need to get ready for our first session.*

If your client answers "I need to think about it."

- *Let me know any more information you might need to help you decide. I'll be glad to answer your questions or schedule a session any time you feel ready.*
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- Follow up with a thank you email, perhaps including a helpful suggestion or link.