

IMPACT

MODULE 3
BEST PRACTICES

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OVERVIEW

Welcome to Module 3 of IMPACT

My intent with the BEST PRACTICES module is to share the thinking behind each stage, what I've learned, and simple examples. The goal here is to expand your mind, open up new ideas, inspire, and give you insights into areas you may or may not have considered. It is NOT to give you a script or a step-by-step process.

I have found in my own work and when mentoring others that real shifts occur when we embody a deeper understanding behind what we do as well as follow what works best for us. Even in the day to day practical needs of growing a business and serving our clients.

When we see the intent or possibilities, we deepen our understanding and can naturally align with our wisdom, and THE WAY emerges.

These videos are conversational, yet I also mix them with specific examples, or at times, I might share how I would articulate something. I allowed the time and space to share nuances in why I might do something and why I wouldn't. For instance, why I prefer not to do cold proposals, even when asked, or why it's important to nurture key relationships when hired inside an organization.

As you engage with the content, I encourage you to lean into the ideas that feel interesting, or new, or spark your curiosity. This active engagement will enhance your learning experience.

This PDF is filled with pointers, prompts, examples, and starters to get you going.



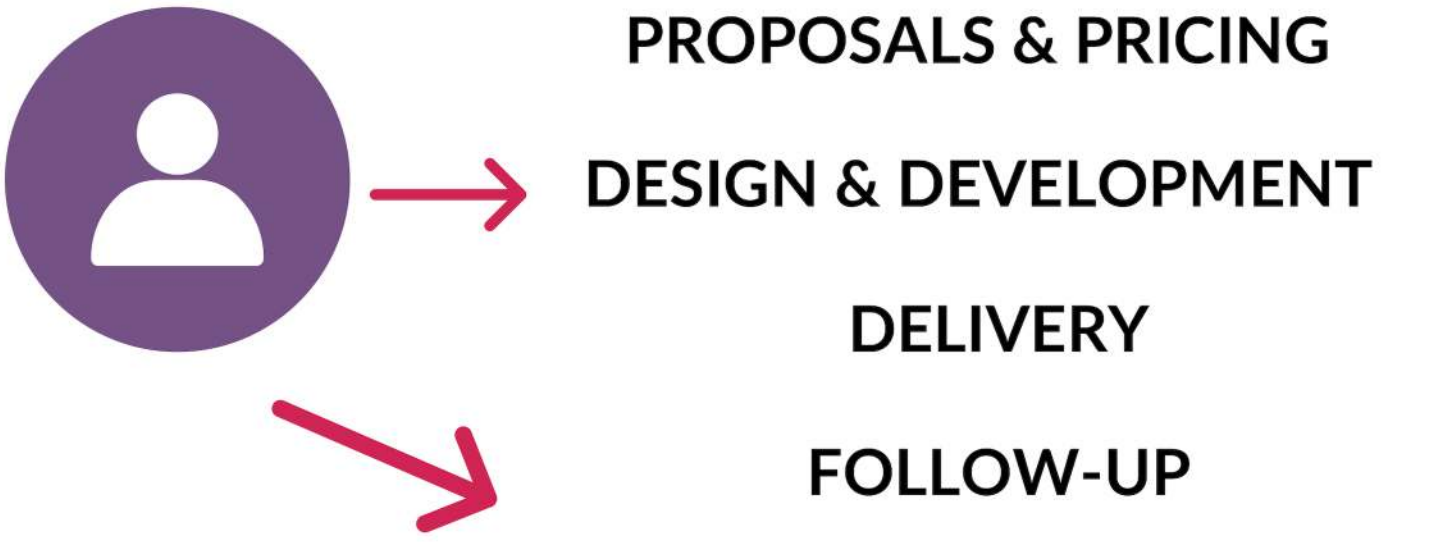
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CLIENT CYCLE

WHAT IS THE CLIENT CYCLE?

- To create a healthy, thriving and sustained business, every stage of the client cycle is worth our time and energy. Below is how I break it down. Others may highlight differently. I've focused on each of these topics in the videos and materials here.



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CLIENT CYCLE

BUILDING RELATIONSHIPS

- In this video, I speak to the value of building relationships as a consistent and foundational focus in your business.
- In addition to sharing the why and who, and how you might do it, I take a moment towards the beginning to speak to your mindset and potential thinking you may have that might be making this feel more challenging.

YOUR NETWORK



Friends & Family

Colleagues & CoWorkers
Current & Past

Super Connectors

School Mates

Current &
Previous Clients

Community Members

Acquaintances

People You've Attended
Training With

Email Contacts

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CLIENT CYCLE

BUILDING RELATIONSHIPS

- **Focus on Connection & Building Relationships**

  Focus on connection, building relationships, sharing what you're up to, and listening. Let go of trying to "find" a client or looking at these connections as a potential client. While that may happen, let it happen organically as a natural output. Be you, and enjoy the process and what these conversations open up for you and the other person.

- **Start With People You Know**

  Your personal network is the best place to start. These people already know you and trust you, which means they're more likely to work with you or refer you to others. You'd be surprised who might need your help or knows someone who does.

- **Keep it Simple & Genuine**

  Reach out. Be genuine and honest. Tell them that you'd love to connect, share what's happening in your life, and catch up with them. In the initial contact, all you're doing is inviting them to connect. You don't have to explain it all there. Simply invite them to a Zoom call or a meet-up in person.

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CLIENT CYCLE

BUILDING RELATIONSHIPS

- **Have Fun & Be Yourself**

  Let go of agendas and enjoy being with or speaking with this person. Focus on the rapport and connection. Be curious and authentic, and remember that while the ultimate intent is enhancing your network and building more relationships, this is a human-to-human connection. Let the organic nature of the conversation guide you.

- **Widen Your Circle**

  Beyond your personal network, where else can you get involved? Local community events, training, associations, alumni networks, business meetups, improv classes, etc. Where would you be interested in learning, meeting other like-minded people, or exploring new interests? Again, the goal is widening your circle and building relationships, planting seeds, and enriching your life.

- **Your Grounding is Your Best Asset**

  Self-consciousness, overthinking, self-doubt, or insecure thinking about this is common and does not have to stop you in your tracks. We all experience these in moments. Remembering that all feelings are temporary and we can find our bearings, come back to the present moment and take the next step.

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CLIENT CYCLE

SALES CONVERSATION

- **Initiate & Ask**

  Pay attention to where you can serve. Ask for the conversation. Let them know you can help. Be bold and anchor in the desire you have to serve. Let your wisdom guide you, let go of attachment and remember - IT'S NOT PERSONAL.

- **What Happens During the Conversation**

GET PRESENT & CONNECT HUMAN TO HUMAN

LISTEN, GET CURIOUS, ASK QUESTIONS & EXPLORE

LET DEEPER WISDOM GUIDE YOU, TRUST WHAT YOU SEE

BRIDGE & CONNECT THE DOTS BETWEEN THE UNDERSTANDING & WHAT'S ON THEIR MIND

RECAP AND CONFIRM WHAT YOU HEARD. DO THEY FEEL UNDERSTOOD?

EXPLORE POTENTIAL WAYS TO HELP & DETERMINE NEXT STEPS

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CLIENT CYCLE

SALES CONVERSATION

- **Nothing "Extra" Required**

  Credibility and trust naturally occur when people feel our presence, our interest, and our authenticity. You have nothing to prove. Learn to trust the power of connection and your ability to hear, respond and explore WITH this person rather than thinking you have to demonstrate anything. The last thing we want is persona driving the interaction.

- **Other Questions They May Ask**

  During the initial conversation, you may get asked, "What would it look like?" or "What do you charge?". In the video, I share my perspective, but as always, trust the moment and do what feels in alignment for you.

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CLIENT CYCLE

PROPOSALS & PRICING

- **The Proposal**

Keep it simple - it does not need to be fancy.

Overview:

What is the intent of the work? What are you aiming for? What is the benefit to the client, and how it aligns with their goals or needs? Use language that resonates for them.

Approach:

What elements are you including? Intake calls, coaching engagements, workshop or training days, follow-up, etc.

Timing:

When will each phase take place? Intake, coaching and/or workshop timing.

Investment:

How much overall? How much do they pay upfront? When will additional payments be made? How will you handle travel expenses?

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CLIENT CYCLE

PROPOSALS & PRICING

- **Let's Talk Pricing**

Helpful guidelines when determining pricing...

- There is no right way or one way to price.
- You can change your pricing with every new engagement. You don't have to figure it all out now. Let yourself learn along the way.
- Do what feels good to you. Let wisdom guide you.
- Where are you in the stage of your work? At times, our goal is to get as many opportunities as we can to share, teach, and learn. While you don't want to undervalue yourself, you might be more willing to be flexible.
- Is there value other than money earned by working with this client?

- **Following Up on the Proposal**

If you don't hear back regarding the proposal you will want to follow up. In the video, I share insights and how I might navigate this. There are no rules here so we want to get comfortable listening to and trusting ourselves.

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CLIENT CYCLE

DEVELOPMENT & DESIGN

- **Consider Your Time at This Phase in the Proposal**

  When you're thinking about pricing, you want to consider the time it will take to develop and prepare. For instance, if intake calls are part of the proposal, how many will you be doing?

- **Communication & Buy-In Along the Way**

  Who, what, and when? Communication at this stage helps create buy-in before the event. If you're doing leadership coaching, who would be good to talk to prior to the start of the engagement? If doing a workshop or retreat, how might you connect with attendees or a sampling of them? This allows you to gain more insights and speak to what's relevant to the leader or group.

- **Your Key Contact**

  Stay connected. Focus on this relationship. It's important to nurture this relationship. They are your internal advocate and have a line of sight that you don't have. You are partners.

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CLIENT CYCLE

DELIVERY

- ### What Do You Need for the Venue or Space?

  If doing an intensive workshop or retreat, where will it take place? If you want to have it off-site, which I recommend, you need to discuss this early on in the process. If a company is making the arrangements, do you have a contact to discuss the logistics? What do you need for an intensive or workshop? Flipchart's, how the room will be set up, etc.

- ### Your Grounding

  During delivery, where you come from will guide the room, the tone, and the depth. No perfection is needed. Your inner climate will be your gauge and your guide. Feeling into the room, trusting where your wisdom guides you. You have everything you need.

- ### Listen to the Person or the Room

  Where is the energy? Are people present and reflective? Is a break needed? Has it started to feel too intellectual? Is movement needed? Would it be helpful to do an exercise and create opportunities for sharing? Be flexible. If you see someone who seems to be struggling or unengaged, speak to them at the break. Pay attention to when the room or the person seems “full”, Check in with the person that brought you in.

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CLIENT CYCLE

FOLLOW-UP

- **What's Included in the Proposal**

  Consider including follow-up as part of your proposal. Follow-up sessions, either one-on-one calls or group meetings and webinars, allow further integration and help people transition their insights into their day-to-day lives.

- **Other Forms of Follow-Up**

  Beyond the proposal and what's included, staying connected, checking in, and offering to support your clients or the attendees, if needed, is a great way to stay connected and to serve. Ultimately, the more the client sees and integrates, the more helpful it is to them and the more they see the value of what we do. Maintaining the relationship serves you and the client.

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CLIENT CYCLE

ON-GOING SUPPORT & SCALE

- **How Else Can You Serve & Support?**

  Don't be afraid to suggest other ways you can serve. As you get to know your client and the organization, you will see other opportunities to support them in achieving their goals or supporting their organization. Don't wait to be asked. Often, people may not be connecting the dots, and we can do that for them. We can offer suggestions based on what we've seen or learned by working with them.

- **Being a Trusted Partner**

  Our relationship with the client or organization has the potential to deepen and grow. When we listen to what matters to the client and see ourselves as their partner, our conversations, feedback, and suggestions come from the place of service. We help them explore and problem-solve. We use our expertise in service to think beyond the coaching conversations and see how else we can support.

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EXPAND YOUR OFFERINGS

WAYS TO SERVE

In each of the videos for this section, I go into specific examples for each area.

- **What is Alive Within You?**

  These videos are designed to help you think more creatively about ways you can serve clients. They are meant to see what gets sparked inside of you. Where are you drawn? What interests you? Letting what is alive in us guide where we go leads to more flow, fun, and fulfillment.

- **Choose one and engage**

  I have seen the most success for myself and my clients when they listen to what is alive along with the next right move for them. We can get excited about all the possibilities and spread our energy too thin, trying to make it all happen. We get overwhelmed, and it can be difficult to get traction. If you are interested in expanding your offerings, pick one thing and move in that direction.

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EXPAND YOUR OFFERINGS

WAYS TO SERVE

- **Coach, Consultant, Trainer**

  This is a simple distinction that allows you to consider if you naturally resonate with a particular way you want to show up to the client or opportunity. All ways serve, and you might alternate based on the need, or you might get clear when listening to the wisdom within and decide that, for now, you prefer one over the other.

- **Individual / Leadership Coaching**

  In addition to the one-on-one sessions, how can you create a robust, in-depth offering that might include leadership assessments, intake calls with bosses, peers, team members, etc.? Will you do intensives plus coaching? How do you involve their boss if hired by the company?

- **Small / Large Group Workshops & Retreats**

  There is so much room to get creative and serve in this model. Are you working with a specific team trying to solve a particular problem, or are you teaching about state of mind, inner climate, well-being, etc?

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EXPAND YOUR OFFERINGS

WAYS TO SERVE

- **Customized Solutions**

  Design a program, workshop, or meeting around a specific issue that the organization or team is trying to solve. Are they trying to be more innovative? Do they have big decisions they need to make? Etc

- **Pilots & Tasters**

  Offering a pilot or a taster is a great way to give people an experience of your work or to help them create more internal buy-in for an extended proposal.

- **Virtual, Online & Hybrid**

  How else could you teach and share? Are you inspired to create content? Could you serve a client that has employees across the country or the world by doing a virtual session? Opening your mind to alternative ways can create new opportunities.

- **Collaborations**

  Collaborations have been an incredible way for me to step into new forms of teaching. They can be a great way to offer even more to a client. They expand our thinking and often help us step up in new ways.

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MODULE 3

PROMPTS & STARTERS

- **Relationship Building**

  Make a list of 25 people that you can reach out to for a connection.

Need a little inspiration to get you started?

The tone of this is casual but you may adjust based on who the person is. Again, this is meant to inspire - please use your own words.

subject: Connect

Hi __,

It's been ages. How are you? How is life?

Things are good here. I'm (pursuing new adventures/shifting directions/finally doing what I've been dreaming about) and now I'm getting the word out.
Or
Over the last year, my work has (evolved/transitioned), and I've made some big moves) and I realize I haven't been great about getting the word out or letting people know.

It would be great to connect. I'd love to hear how work and life are going for you and to share more about me.

Let me know if that sounds good to you and when you have the time and space.

Until then, please know I'm thinking about you and wishing you all the best.

Sincerely,

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EXPAND YOUR OFFERINGS

PROMPTS & STARTERS

- **Widen Your Circle**

  What are 5 ways you can get involved, try new activities, and meet new people?

- **Sales Opportunities**

  List 5 people or companies you know could benefit from your services.

  How could you initiate a conversation with each of them? If an introduction is needed, how could you make that happen?

  Where could you build relationships or get involved to foster relationships with these companies or individuals?

- **Current or Previous Clients**

  List 2-3 clients that you would like to explore where you might be able to serve in more ways. Have you follow-up with them in a while?

  What do you see? Who would you need to talk to?

  What would it take for you to initiate that conversation?

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EXPAND YOUR OFFERINGS

PROMPTS & STARTERS

- **Expanding Your Offerings**

  Where are you most inspired to try something you haven't done before? What is the next step to take?

  Would you like to collaborate with anyone? What would that partnership offer you, them, and the potential clients?

  How could you approach them?

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NOTES

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