MODULE 11

HOW TO MANAGE YOUR CLIENTS

The Coach School

Workbook

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MODULE 11

How to Manage Your Clients

From onboarding to asking for referrals, managing your client load can be a full-time job. When you create a client management process that works for you, you free up more time to actually spend with your clients to help them make progress on their goals.

Lesson Checklist:

- **Training 11.1 : Developing Your Client Management System**
- **Training 11.2 : Serving Current Clients While Bringing in New Ones**
- **Training 11.3 : How to Keep Clients Coming to You**

Training 11.1

Developing Your Client Management System

You need a client management system that is replicable, eliminates confusion for you and your client, enables easy communication, and is perfectly organized and efficient.

Describe your current client management system. What works? What doesn't work?

As we prepare to set up the perfect client management system for you, let's define what that looks like.

What do you need from a client management system?
Ex. Organization, easy access, syncs to all devices, replicable, etc.

What do your clients need from a client management system?
Ex. Free of confusion, easy to use, organized, all in one place, etc.

If you haven't yet, take time to stop and watch the Basecamp walkthrough video bonus you unlocked at the end of this module's training videos.

Remember, simply using email is an unacceptable form of client management. You will need to use an online project management tool to manage your clients. If it's not Basecamp, that's okay, but you need to choose a platform that you will use.

Now, it's time to set up your client management system! You will create a portal within the platform you've chosen for each client you have. There are 5 steps. Follow each step for every client you sign and then once more so you have a fully ready client portal set up for the next client you sign!

Step 1: The Welcome Letter

The welcome letter should be waiting in the client portal when you first give your client access. The purpose of the welcome letter is to:

- Welcome them to their client portal
- Explain their next steps
- Give them a couple of pointers on how to use their portal

Make a bullet point list of everything you'd like to include in your client welcome letter below.

Next, write your client welcome letter and save it in your online client portal. You can edit this at any time (and you will!) but for now, write your first draft of a welcome letter. Be sure it includes everything you listed in your bullet points above.

Step 2: Journal

Next, we will establish a place in your client portal for your clients to journal about their progress, roadblocks, and goals. Whatever platform you use for client management should have a text document feature. This is a great place for the journal.

Give your client clear instructions for the journal. They should fill it out before each session with you. You can tailor the questions in the journal to your coaching business. I always ask:

- What are your current challenges?
- What do you want to work on next?
- What are your 3 goals for the next week?

What questions will you ask your clients in your journal?

Set up the journal in your client portal.

Be sure you have communicated to your client the expectations around the journal (welcome letter is a great place to do this!) and set a time in your calendar to review their journal before your sessions.

Step 3: Discovery Document

The Discovery Document should be one of the first things you have new clients fill out. It will help you tailor your services for each specific client.

What information is vital for you to have about a new client? List everything you can think of below.

Is there anything else you need to know to best serve your clients?

How will you get to know their personality so you can connect and coach each individual client? Will you use a personality or enneagram test? Take time to choose how you will get to know their personality and write it down here.

Using everything you've written down in the last three questions, what 5-10 questions will you include in your Discovery Document? Remember, the goal is to get to know them but not to overwhelm them!

Create your discovery document and save it in your client portal.

Step 4: To-Do's

Your client portal should also include a place for you to assign to-do's. You can decide if you want to assign to-dos after each session for your client or you can leave it to your client to choose to use this section or not. It gives them a place to plan the actions they will take after you have a session with them.

You want to encourage them to use it. It will give you another glimpse into their progress and growth.

Designate a space for to-do's in your client portal and be sure you communicate to your client how to use this space.

Step 5: Communication

The final part of your client portal is a place for communication. Before we establish the place for communication, let's talk about communication boundaries.

What hours will you be available to your clients?

____

____

How will you be available to your clients? Check the options below.

- [ ] Email
- [ ] Portal
- [ ] Phone call
- [ ] Text
- [ ] Other ____

Set up your space for communication with your clients in their portal and be sure to communicate your availability to them.

Congrats! Your client portal is all set up! Before we move on, ask yourself: Is there anything missing from this portal that is vital to my coaching business? Your business is unique and you may need to add something else to the portal. If so, add it now.

Finally, repeat steps 1-5 for each of your clients and then once more so you have a portal set up and ready for your next client.

Training 11.1 Notes

Serving Current Clients While Bringing in New Ones

Do you find it challenging to serve current clients while bringing in new clients?

Consider your current plan for your time. Pull out the time audit you completed last week in Module 10. If you skipped this activity, here's the template on Google Sheets for you to complete now. Or, turn to the next page of this workbook for a clean copy.

Highlight the hours you spend managing current clients, then highlight the hours you spend marketing to potential new clients in a different color.

Count the total hours you highlighted. This is the number of hours you spend working on your coaching business.

Write it here: ______________________________

Now count the hours you spend managing current clients and divide it by the total number of hours you work on your coaching business. This is the percent of your time you spend managing current clients.

Write it here: ______________________________

Next, count the hours you spend marketing to new clients and divide it by the total number of hours you work on your coaching business. This is the percent of your time you spend marketing to new clients.

Write it here: ______________________________

What is your goal number of clients? ______________________________

How many clients do you currently have? ______________________________

	7:00	8:00	9:00	10:00	11:00	12:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00
MONDAY															
TUESDAY															
WEDNESDAY															
THURSDAY															
FRIDAY															
SATURDAY															
SUNDAY															

Do you have more time or more money to invest in your coaching business? Explain.

Based on the training, how do you feel about the percentage of time you spend on each of these priorities? Does anything need to change? Remember, even when you are at your max number of clients you should still be spending 20% of your time marketing to new clients.

Do you need to spend more or less time managing current clients? Why?

How will you make these changes?

Do you need to spend more or less time marketing to new clients? Why?

How will you make these changes?

Based on your answers to the questions for Training 2 in this workbook, what next steps do you need to take to better balance client management with client acquisition? List at least your first 3 steps.

SCHEDULE TIME TO MAKE THESE CHANGES!

Training 11.2 Notes

Training 11.3

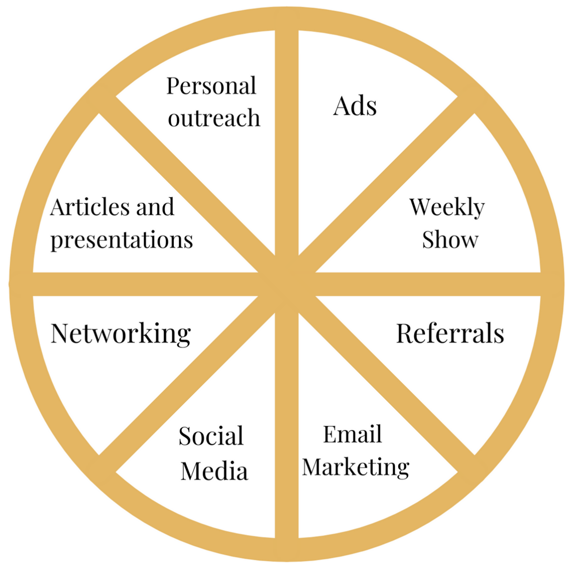
How to Keep Clients Coming to You

Welcome to Momentum Marketing! This workbook is going to help you implement a marketing strategy with energy, power, and drive!

Think back to what you learned earlier in the program about the magic of a flywheel.

For your coaching business to have energy, power, and drive it needs to have new fresh clients flowing in constantly and they need to be coming in from multiple smaller sources. Momentum marketing is building multiple streams that bring people to you.

Our goal is to continually build momentum into your marketing.



Here is a list of possible streams that could feed into the momentum of your marketing. **Next to each one, write whether or not you currently utilize it and how it is working for you.**

SOCIAL MEDIA

EMAIL LIST GROWING CONTINUALLY FROM GREAT LEAD MAGNETS

TRAINING 11.3: KEEP CLIENTS COMING TO YOU

PAID ADS ON SOCIAL MEDIA

PARTNERSHIPS AND COLLABORATIONS WITH OTHER SERVICE PROVIDERS

REFERRALS FROM OTHER SERVICE PROVIDERS

YOUR WEEKLY SHOW (PODCAST, IG OR FACEBOOK LIVE)

GREAT SEO ON YOUR WEBSITE

PINTEREST

OTHER

Which streams are working the best for you?

Which streams are you currently utilizing but they are underperforming? What needs to change so these streams can be more productive and create more momentum?

Which streams are you not yet utilizing but would like to start?

Based on the answers to the three questions above, what next steps do you need to take?

When will you take these steps? Schedule them!

The most important tip I can give you about Momentum Marketing is this: If you want to create momentum in marketing, you need to do more of what works to bring you new clients and less of what doesn't work.

So, we need to know what is working for you and what isn't working. How can we figure this out? We are going to measure what works and what doesn't in two different ways.

First, you are going to start a spreadsheet to keep track of how people find you.

Use your Coach School Lead Tracking spreadsheet you received with the Sales module.

TRAINING 11.3: KEEP CLIENTS COMING TO YOU

It's crucial to figure out how people who end up becoming clients find you. This is probably the most invaluable information you can have in building your business! We do this so we can double down and focus on doing the things that bring us our perfect person.

How will you figure out how people are finding you? List the ways.

Use the spreadsheet to keep track of how people find you from now on. And once you know how people are finding you–do more of that!

Second, once a month you are going to schedule time to look at analytics from your social media accounts, email newsletters or sales campaigns, Pinterest, etc. You need to take the time once a month to analyze any platform that you are using to reach new people and tell them about yourself.

Here is a list of places you should track analytics on each month. **Check the ones that are applicable to you:**

- [ ] Website
- [ ] Social Media
- [ ] Pinterest
- [ ] Email Campaigns
- [ ] Other ____________________

For each item you circled, use the space below to make a plan of how you will track the analytics. There is a recommended plan listed for each item. Expand on this if needed.

WEBSITE – Use Google Analytics on your website and track which pages are most popular and where your traffic is coming from.

SOCIAL MEDIA – Track what people like most, what they share with others (this is how our accounts grow), and how many people save it.

PINTEREST – Use analytics to track your saves and link clicks.

EMAIL CAMPAIGNS – Track what percentage of people open the emails and what percentage click on a link within the email.

OTHER –

You've made the plan, now it's time to schedule it! **Schedule a time to review your analytics!**

You may also want to make a spreadsheet or checklist where you can keep all of your analytic information easily accessible.

After this training, you should think about marketing in a whole new way. You're not just trying to market occasionally on a platform or two. You need multiple streams of marketing that you are always investing in so that you can create momentum! When your marketing has momentum, your business has momentum!

Training 11.3 Notes

MODULE 11

Wrap Up

Great work finishing up this module! You're one step closer to booking clients and growing your business. Take a moment to reflect on all you learned, and then don't forget to visit the bonuses you unlocked.

My biggest takeaway from this module is . . .

The changes I made based on this module that will help my business be successful are . . .

Some things I learned in this module that I wasn't able to focus on right now but want to come back and work on later are . . .