Client Management Process

This system outlines the end-to-end process for a new one-on-one coaching client.

Step 1 - Receive and follow-up on a lead

1. Coach receives a lead via phone or email.
2. Coach contacts the lead and books a complimentary session with the client.
3. Coach emails the client the following information:
   a. Your **Coach Bio** including testimonials
   b. Your website address (optional)
   c. Session details including time and location

Step 2 - Convert lead to a paying client

1. Coach conducts the complimentary session with the client using the **Prospect to Client Script.**
2. Near the end of the session the coach provides the client with a summary of **Coaching Products.**
3. The client chooses a product.
4. After the session, coach emails the client the following information:
   a. **Tax Invoice**
   b. **Client Questionnaire**
   c. Session details including time and location

Step 3 - Conduct coaching program

1. During the first 10 minutes of the first session, the coach and client go though the **Coaching Agreement**. Client signs the agreement.
2. At the end of each session the coach summarises his/her notes into the essential key points from the session using the **Client Tracking Worksheet** (this will make it easy for you to prep for the next session).

At the end of the program the coach asks the client to fill in the **Coaching Feedback Form.**