

SURFACE TO SOUL

Live Well | Lead Well | Coach Well

Coaching Business Checklist

Preliminary Questions

- Describe: "What's your dream?" and "Who is your ideal client (avatar)?"
- Assess: "How much money do you have available to launch?"
- Decide: "What is your target date to get your business up and running?"
- Reflect: "How would you define "success"? What are your limiting beliefs?"

Defining Your Niche

- List: "What are you passionate about? (Get specific about who you are going after)"
- Research: "What are the needs of the market? Who are my competitors? What do they offer?"
- Define: What you'll offer, and write your 30-second and 1-minute elevator speech.

Business Formation Steps

- Determine business structure (Sole Proprietorship, LLC, S-Corporation).
- Choose a corporate name (even if you are a Sole Proprietorship entity).
- Get an Employer Identification Number through the IRS (free).
- Get a State Identification Number and Business License (\$\$\$).
- Depending on the business structure, get liability insurance for you and/or business. (ICF offers a great option through the Hartford Insurance Company).
- Open a business bank account that comes with a VISA/Mastercard ATM card.
- Optional: Register business with Duns & Bradbury (DUNS) and NAV. (DUNS will provide you with a number that you can give other business you do business with in order to build business credit. NAV is the equivalent of EQUIFAX or other credit agencies, but for business). Start building credit for your business.

Marketing:

- Determine what you will charge for your services.
- Create a logo (doesn't need to be too sophisticated). Create a "tag line" and an email signature.
- Determine if you want business cards. (Today e-cards are more common, but having a business card doesn't hurt. Follow the rules to create an effective business card).
- Purchase a URL that comes with email accounts.
- Update or create a LinkedIn account. (Make sure to add logos received when completing certifications).
- Create a website. (Follow the 8-second rule and add offer something for free to create your client funnel).
- Frequently track traffic on your website.
- Update your LinkedIn page to reflect your coaching expertise and the services you provide.
- Create a blog/e-newsletter where you provide free information targeted to your audience (post frequently).
- Create a social media presence and post regularly. Invite people to follow. Follow others.
- Identify and network with at least three "connectors" (people who have connections with large # of people).
- Network with other coaches and business people (Chamber of Commerce; local civic groups).
- Develop benchmarks for success.
- Don't make your website/business cards too busy, less is more (hire a professional if not sure)
- Don't subscribe people to your blog/newsletter without their permission. (Don't assume that having a business card is implied permission). Don't keep people on your marketing list if they asked you to be removed.

Contracts

- Create the habit of writing a contract every time you engage a new client even if pro-bono.
- Offer various options to the client e.g., platinum, gold, silver options.



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