EARN YOUR FIRST (OR NEXT) 5K

BIG BUSINESS CHECKLIST

GETTING CLEAR AND STARTING THE RIGHT BUSINESS

- ☐ Create a vision for your business and life
- ☐ Commit to your vision and goals and decide to do whatever it takes to make it happen
- ☐ Make a decision to ACT in spite of fear and resistance
- ☐ Write down your mantras "clarity comes through action," and "information without action is useless," "this gets to be easy"
- ☐ Surround yourself with a community of people (virtual or otherwise) that STRETCH YOU.
- ☐ Clear the clutter from your mind, body, and environment
- ☐ Create your Global Vision Statement (your why for the world), your Personal Power Statement (how you use your unique gifts to help serve this mission) and your Ideal Client Characteristics and Desires.
- ☐ Come up with your Sweet Spot – where your skills, your world vision, and your clients needs collide.
- ☐ Decide on scale of business you want to create

LEGAL AND FINANCIAL SYSTEMS

- ☐ Decide on name for your business or if you will be using your name (I recommend using your name since that won't likely change where as "Butterfly Wellness" might feel outdated if you want to write a book eventually, and "Northern Vermont Health Services" will change if you want to move. So think BIG picture).
- ☐ Make sure your business is registered in your state (or as legally required in your state, this means you need to decide on your business structure: LLC, Sole Proprietorship, Corporation, etc. A lawyer can consult you on this. I chose single-member LLC because it allows me to file taxes like a sole proprietor yet

offers more protection legally as it is it's own separate entity. Note for an LLC you may need to file an annual report or have other obligations, be sure to make note when you register your biz.)

- ☐ Make sure your financial systems are set up including:
  - o PayPal Account
  - o Business Checking and Savings Bank Accounts
  - o Business Credit Card (I use Capitol One SPARK Business Card, Google with have the best rates and perks for your needs).
  - o Set up bookkeeping like Quickbooks Self-Employed, Zip Books, Shoeboxed, or simple excel sheet with income and expenses.
  - o Talk to a tax professional/accountant/bookkeeper about setting yourself up for taxes, and tracking income and expenses in your business.
- ☐ Evaluate your need for business insurance and legal support; reach out to resources in your local area if needed.
- ☐ OPTIONAL: Create a G Suite Business Account if you want to have an @yourdomain.com email address. This is how I got info@krissyleonard.com rather than krissyleonardcoaching@gmail.com. It is not necessary but it does give a professional tone to your contact info, business cards, etc. Here is a shortcut to the page to register, it's about $5 a month: http://bit.ly/2kP4lcG.

BECOME AN EXPERT ON YOUR IDEAL CLIENT

- ☐ Decide who you would like to serve for the next 3-6 months (this can change)
- ☐ Research your ideal client's deepest challenges, hopes, needs and desires
- ☐ Create Desire map using their exact language

- ☐ Create tagline/Summary of what you do and who you help
- ☐ Decide on your title (ex. Holistic Nutritionist, Weight Loss Coach, Body and Mind Transformation Strategist, etc.)
- ☐ Put your title and your tagline summary in the footer of your email signature.
- ☐ Set up a Yelp and Google Local Business Account (ask everyone you've helped to solve the problem your coaching solves to write you a review on Yelp or Google Local. It doesn't necessarily need to be a paying client, but anyone you've helped.)

CREATE YOUR OFFERS

- ☐ Decide on the problem you want to help your clients solve. Remember: clients buy the WHAT not the HOW, in other words they want to know *what you can promise* that will make their life better and solve their problem, not *how* you do it. Focus on the BENEFITS over the FEATURES.
- ☐ Shift from asking yourself how you can "give more information" to "how can I create a transformative experience for this client"?
- ☐ Learn how to create your signature system to deliver on a desired result without needing to recreate the wheel for every new client.
- ☐ Decide on your intro offer and create outline
- ☐ Decide on your core program and create outline
- ☐ Create compelling copy for your offers
- ☐ Learn how to price your products and services.

WEBSITE BASICS ("GOOD ENOUGH" FIRST PASS)

- ☐ Register your website domain/URL (this is the name of your site ex. www.krissyleonard.com) on bluehost.com (I recommend hosting with Blue Host and building your site with wordpress.org (<u>not</u> wordpress.com there is a difference!))

- ☐ Create your Wordpress.org website with custom URL or hire someone to do this for you.
- ☐ Choose a "theme" from word press or purchase one via a 3rd party and upload it to your site. (I use Analogue by Station Seven).
- ☐ Download akismet and back up plug in for wordpress to reduce spam and to back up your site.
- ☐ Create the following pages:
    - Homepage (describing who you are, what you do, who you work with, what problem you solve.)
    - About page (who you are and how you help)
    - "Work with Me" Page (Services with link to consult)
    - Success Stories (Testimonials Page, fill this with test clients or even family and friends who have benefited from you work to begin with)
    - Blog (set up and ready to go)
    - Contact Me (with contact information)

BLOGGING AND NEWSLETTER

- ☐ Create an account/choose your email newsletter provider from one of the following: Mailchimp, Aweber, Mad Mimi, or Ontraport. (I personally prefer Mailchimp or Aweber to start).
- ☐ Complete any necessary training on how to use your newsletter service.
- ☐ Create sign-up for updates/newsletter on every page of your site and link to your email list.
- ☐ Learn how to write copy that coverts your readers to customers
- ☐ Choose your "HIT SEND" time and day of the week (or bi weekly if you choose) for when you will publish your newsletter.

- ☐ Use blog idea generator, client research, your own experience, and info gathered from consults to create list of topics to blog about. Put this on paper that you have next to your desk or on google drive so you can update it regularly.
- ☐ Create your email newsletter template
    - o Decide on preferred mode of delivery: ie video, photo centric, or written. (If video, set up youtube account as well).
    - o Decide on font
    - o Decide on point size
    - o Typed signature or scanned signature
    - o Header or no header
    - o Photos or no photos
    - o PO Box or not (your email newsletter program will make you include a physical address in your emails, you can use your personal address or rent a PO Box if you prefer more privacy)
- ☐ Write a post (or 2 or 3)
- ☐ Send your first newsletter and make this a weekly habit.

SALES

- ☐ Title your Closing the Deal Conversation
- ☐ Create "Prepping for your Session" Email Template or include questionnaire in your scheduling software.
- ☐ Create account with an online scheduling software (I use Acuity, others are Full Slate or Timetrade)
- ☐ Put a link to your scheduler on your "Services/Work with Me" Page.
- ☐ Decide how you want to accept payment (cash, check, paypal, etc)
- ☐ Create scheduling blocks for coaching and consults
- ☐ Write your consult script according to this proven sequence:

1. Establish Rapport & Pre-Frame The Call
2. Draw Out The Desired Outcome & Vision
3. Draw Out The Problem (What's stopping them or slowing them down from getting what they want, & what it's costing the client to continue to have this problem)
4. Offer Your Solution
5. Invite Them To Take The Next Step

- ☐ Practice your consult script, especially handling "money worries."
- ☐ Practice LOVING these conversations and becoming the "activator" so that eventually you are enrolling 8 out of 10 people you talk to.
- ☐ Learn how to establish rapport and trust with clients.
- ☐ Create new client tracking system: include name, contact, major issues/problems/challenges, dreams and desires (in their words) and follow up action needed.
- ☐ Write New Client WELCOME Email (pre-frame the awesomeness, include link to schedule, link for payment, and how to get the most out of their program with you.)
- ☐ Create business contract/legal disclaimer and waiver to be signed by each client
- ☐ Write sample follow up emails
    - When you get a yes, and they need to make their payment
    - When they need to "think about it"

START ENROLLING AND SERVING CLIENTS

- ☐ Create your signature talk and book your first workshop (be sure to gather emails for CTD conversation)
- ☐ Send out Personal Email
- ☐ Get business cards and CTD flyers and posters made
- ☐ Prepare for greater visibility in your community

- ☐ Connect with Referral Partners
- ☐ Practice Client-Generating Activities
- ☐ Re-COMMIT to your vision (especially when you are scared)
- ☐ Surround yourself with like-minded people who believe in you.
- ☐ Master your CTD conversation
- ☐ Reach out to local media and position self as an expert
- ☐ Practice using questions and coaching skills that get your clients a powerful result in every session.
- ☐ Read the Prosperous Coach.
- ☐ Accept that you are responsible TO your client but not FOR your client.

UPLEVEL YOUR WEB PRESENCE

- ☐ Create your Opt In offer for your website
    - o Create a squeeze page or for your opt in
    - o Put the opt-in offer on your homepage
    - o Put the opt-in offer in your sidebar.
- ☐ Write Email Auto responders
    - o Immediate email with auto responder
    - o 3 days after opt in email
    - o 10 days after opt in email
    - o 28 days after opt in email
    - o 2 months after opt in email.
- ☐ Refine About page
- ☐ Refine Services Page
- ☐ Refine Homepage if needed
- ☐ Consider getting professional photographs taken
- ☐ Start using Google Analytics

SOCIAL MEDIA

- ☐ Decide which social media platforms you want to play with, you don't have to use them all! Start with TWO.
  - o Facebook
  - o Youtube
  - o Twitter
  - o LinkedIn
  - o Pinterest
  - o Instagram
  - o Google+
  - o Other _________
- ☐ Update your profile in each one with your hot hook, your contact info and link to your website.
- ☐ Set aside time once a week to schedule and post engaging, meaningful, directed posts that help your target client solve a problem, educate them, inspire them, or help them know like and trust you. This should take no longer than 10-15 minutes per post and should be done in batches!

TAKING IT TO THE NEXT LEVEL

- ☐ Learn how to set 3, 6, and 12-month goals and create an action plan.
- ☐ Increase the number of clients you serve through offering a group program.
- ☐ Refine your bookkeeping systems
- ☐ Contract a graphic designer to help with online marketing
- ☐ Contract 1-2 technical assistants to help with online marketing
- ☐ Refine your signature system, begin to develop automated programs
- ☐ Consider podcasting, monetizing your blog, or other time-intensive project
- ☐ Evaluate your opt-in gift

- ☐ Upgrade your brand and marketing materials, consider revamping your website and/or getting professional photographs taken.
- ☐ Become an expert in what you do
- ☐ Create your first information product
- ☐ Pay yourself regularly
- ☐ Create personal savings goals and business goals
- ☐ Focus in on self-care and WHO YOU WANT TO BECOME in your business.
- ☐ Up-level your business connections, make yourself more visible and play on a bigger field. Connect with "higher-level" coaches and colleagues that STRETCH you.
- ☐ Expand your coaching and skills so that you can serve a greater number of people more powerfully, look into advanced trainings that build on your experience and will help you deliver more VALUE to your clients.
- ☐ Develop trust in your intuition
- ☐ Become aware of when clients trigger you and how to elevate your thinking and come from a place of service and firm, yet loving guidance.
- ☐ Master creating experiences that transform the lives of your clients.
- ☐ Re-evaluate your vision and your WHY. Make sure you are continually connected to your bigger vision and that your work and where/how you spend your energy reflects that.