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How To Get The Most From This Training

1. Use every minute as an opportunity to give or receive coaching, even in casual conversation.

2. Watch how Kendall and the other participants interact. You’ll see many golden coaching moments!

3. Seek to get the learning in your body (muscles, bones, fiber), not just in your head. “Information is only a rumor until it’s in the body.”

4. Recognize non-resourceful feelings as the signal you’re on the way to a breakthrough!

5. Hold yourself as powerful, no matter what.

6. Be willing to receive support. Breakthroughs aren’t just for your clients, they’re for you too!

7. Expect a miracle.
Intuitive Coaching Toolkit™
Intuitive Coaching Toolkit™ Includes...

- Positions of Empowerment
- Cracking the Code Tool
- Finding Productivity, Profits & Freedom In Your Business
- Give Yourself A Raise With Empowered Boundaries
- Branding Module: Bonus Exercise - Embracing Your Unique Brilliance
- Niche Module: Niche Mindset Exercise
- Signature System™ Module: Signature System Mindsets
- Signature System™ Module: Inspire Your Client To Love Signature System
- Packages Module: The Secrets To Creating Your Platinum State Of Mind
- How To Charge Module: “Empowered Pricing Paradigm” Visualization
- How To Charge Module: Stepping Into New Pricing Exercise
Positions of Empowerment

Ways to use:

- When client can’t see options
- When client is struggling with boundaries, taking on other people’s “stuff” or not able to see someone else’s perspective
- For you to get information so you can coach your client to create a breakthrough
- To create an opportunity for a breakthrough without “pushing” the client
- To neutralize a sticky situation
- To tell you as the coach where to go next in your coaching session

**Empowered from Self**

“What’s important to me?”

**Empowered from Other**

“As other, what’s important for you?”

**Empowered from Observer**

“What am I noticing that’s important to each of them?”

**Empowered from Spirit**

“What flows through me as I connect with spirit?”
Cracking The Code Tool

Ways to use:

- To help your client get out of overwhelm
- To help your client make a decision
- To help your client create powerful money goals
- To help your client create more powerful choices

Check in with your client regarding:

✓ Color
✓ Proximity/Distance
✓ Clarity/Focus
✓ Tone/Volume
✓ Where it exists spatially in relationship to them
✓ Where in the body it’s felt
Finding Productivity, Profits & Freedom In Your Business

What are you tolerating in your business?

What is this preventing or delaying you from implementing?

What is this costing you?

My action step is:
Give Yourself A Raise With Empowered Boundaries

Common Boundary Breakdowns

- Going over on sessions
- Allowing too much email access
- Giving clients additional, unpaid services
- Over-loading your packages
- Customizing packages
- Not asking clients to get current with their payments
- Giving service to clients who are behind on payments
- Undercharging because you feel guilty about charging more
- Deciding in advance that someone can’t afford to pay your fees
- Not negotiating with a client who wants to drop out of a program
- Clients asking for more than what was initially agreed upon
- Not asking a client for a non-refundable deposit
- Saying "yes" when asked for a discount
- Saying "yes" when a client asks to prolong or extend the timeframe of their program
- A client questioning your fees or the value of your services

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<th>Boundary Breakdowns</th>
<th>Empowered Actions</th>
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<td>3.</td>
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What Is Branding?

Branding can at first seem very confusing because there isn’t any one thing you can point to and say, “That’s a brand.” A lot of people think of Coca-Cola, IBM or Honda. They see a logo in their minds, and they think the logo is the brand. Actually, it’s not. Your logo and your tagline are just one tiny aspect of your brand. Your brand is a combination of elements that all add up to this...

Your brand is the PROMISE of an EXPERIENCE.

Your brand is an opportunity to create:

✓ Meaningful, thought-provoking connections with your clients.
✓ Focus, intention and energy for you in building your business.

All great personal brands clearly answer these three questions:

Who am I? What do I stand for? What am I an expert in or at?

For example, Deepak Chopra’s brand is:

A healer of mind, body, and spirit.

He stands for:
There is more to life than what we see.

He is an expert at:
Making something esoteric understandable to mainstream America

The proprietary Branding with Archetypes® system ensures that your brand is a deeply emotional experience for others and highly authentic experience for you.
What Is Branding With Archetypes®?

Archetypes are images, characteristics and qualities that are imprinted in our human psyche and are immediately understood because they are universal.

- We intuitively understand archetypes.
- They immediately create meaning and feeling.
- Brands are about emotion and connection.

Archetypes provide a structured, easy to use method for creating meaning, emotion and connection with your ideal clients, in a way that is authentic to YOU!

Why Use A Signature And An Influencing Archetype?

Your Signature Archetype represents the core nature, motivation and driving force of you (or your company). However, used alone it does not create enough dimension or personality to stand out as unique in a crowded market.

Which is where your Influencing Archetype comes in.

Your Influencing Archetype gives dimension, color, tone and uniqueness when integrated with your Signature Archetype. For example, a consultant whose Signature Archetype is Ruler and Influencing Archetype is Artist will have very different messaging, marketing look+feel, strengths, values and vision than they would if their Signature Archetype were Ruler with an Influencing Archetype of Humanitarian.

Are We Branding Our Business To Reflect Our Archetypes Or The Archetypes Of Our Ideal Clients?

Here is the simplest way to answer this important question: Your archetypes always reflect YOUR uniqueness... and they appeal to a matching core desire that is currently important and strongly present within your ideal clients.

For example, if your Signature Archetype is Ruler, Influencing is Alchemist, you will appeal to a core desire within your ideal clients to seek out structure and get control, and create a significant change at a time in their lives when they feel out of control and unable to create a plan for themselves.
# The Soul Of Your Brand Guide

<table>
<thead>
<tr>
<th>SIGNATURE ARCHETYPE</th>
<th>INFLUENCING ARCHETYPE</th>
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<tbody>
<tr>
<td>Unique Brilliance:</td>
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<tr>
<td>I'm a stand for</td>
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<tr>
<td>I am an expert</td>
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## MY BRAND PROMISE

## BRAND BRILLIANCE VALUES

## BRAND SOUL CLIENT EXPERIENCE

What we believe is possible for our clients

What we will not tolerate in our clients

## WHAT MY CLIENTS FEEL...

<table>
<thead>
<tr>
<th>Before Signing On</th>
<th>When Considering Signing On</th>
<th>After Signing On</th>
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## PERSONALITY OF YOUR BRAND

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<th>SONG:</th>
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<tr>
<td>FONT:</td>
<td>COLOR:</td>
</tr>
<tr>
<td>PLACE:</td>
<td>TEXTURE:</td>
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Creating Your Brand

Step #1:
Take the *Branding with Archetypes®* Assessment and decide on your Signature and Influencing Archetypes.

Step #2:
Create your Unique Brilliance.

Step #3:
Use the guided *Branding With Archetypes®* visualization.

Step #4:
Write what you are a stand for in your business.

Step #5:
Write what you are an expert in or at in your business.

Step #6:
Make your Brand Promise.

Step #7:
Create your Brand Brilliance Values.

Step #8:
Create your Brand Soul Client Experience.

Step #9:
Add personality to the soul of your brand.

Step #10:
Create your *Branding With Archetypes®* touch points.
STEP #1: Take The Branding With Archetypes® Assessment

When taking the Branding With Archetypes® assessment think of the business you want to have. This can influence the results.

How To Resolve A Scoring Tie

Here is exactly what to do if you have a tied score for one of your top 2 archetypes.

The Branding with Archetypes® assessment is a highly accurate tool that we use to determine what the primary motivator and characteristics are for your business.

But because we’re human beings, it also means we’re incredibly complex creatures. Sometimes we can have more than one archetype tied for one of the top 2 positions.

So if you have a tie, you can use what I’m about to share with you to resolve the tie.

A tie happens because more than one archetype is strongly represented. Let’s say you have a 2-way tie for your top highest scoring archetype. That simply means that both of those archetypes are strongly and equally represented for your business. It means that both of those archetypes have equal power and influence for you.

It also means that your business brand soul and strengths can be a little more complex because there is more than one archetype strongly present. And likewise, it means the challenges of both archetypes are both strongly present.

Keep in mind we’re only looking at resolving a tie for the top 2 highest scoring archetypes. For example, if you have a tie for 3rd or 4th archetype we’re not going to concern ourselves with that because the archetypes that far down in the scoring is not relevant.

Let’s say you have a tied score for your top archetype. What you’re going to do is answer a particular question (that I’ll give you in just a second) designed to help you easily choose which of these tied archetypes is going to become your number one. Then, the one you DON’T choose will become your 2nd archetype. Got that? Let me give you an example.

Let’s say someone has a tie for their first archetype between Ruler and Alchemist. They answer the tie resolving question, and based on their answer they decide that Ruler is their #1 archetype. That means Alchemist automatically becomes their 2nd archetype.
So what happens to the archetype that had scored the 2nd highest, just after the ones tied for first? Well, because you now have their 1st and 2nd, it becomes their 3rd which is not a significant position.

Let me give you another example. Let’s say there was no tie for their highest score, which was for Explorer. However, there was a 2 way tie for 2nd, between Sage and Maverick. They would answer the tie resolving question to determine which of the 2 archetypes tied for 2nd place is going to stay in 2nd place.

Let’s take a little more unusual situation that can happen. Let’s say there is a 3 way tie of high scores, meaning there is a 3 way tie for first. They'll answer the tie resolving question to discover which of those 3 archetypes stays #1. Then, for the remaining 2 archetypes, they'll answer the tie resolving question again to determine which archetype becomes the 2nd. The 3rd one that wasn’t selected drops down in the sequence and is not used in their branding as it’s no longer relevant.

One more thing I want to make sure you know before I share the tie resolving question is this: For each of us, our #1 archetype has the most significance because it IS the driving personality regarding our business branding. It represents our greatest gifts and also our greatest challenges for our business, which really means, our greatest opportunity for growth, contribution and empowerment. The more we stretch to fulfill the destiny of our top archetype, the more whole, authentic, empowered and extraordinary our business becomes. This gives us the opportunity to break free of past limitations and imprinting, and to move forward with power, purpose and passion as we become the leader of our business.

Let me share with you the tie resolving question so that you can make a choice that is most fully in alignment with how you want to brand your business.

The question is very simple and it is this:

“Everyone’s goal with their business is to create financial success and spiritual fulfillment. For each of the archetypes that are tied, read the Spiritual Contract, then answer this question: Which one will empower you the most to stretch and grow into your full brilliance?”

For many, the answer will be immediate. And for some, talking through each of the different Spiritual Contracts for their tied archetypes will help make a final choice.

Remember, the one they choose may not be one that represents the easiest path. Many times, creating a financially and spiritually successful business requires us to stretch and grow in areas that are new and at first can feel scary or uncomfortable. What is important is that you really feel pulled forward by the archetype you choose as your Signature and Influencing archetypal business brand.
STEP #2: How to Discover Your Unique Brilliance

Your Unique Brilliance is not a skill like driving a car. It's a powerful force that describes the very core of who you are as an individual. It is the very essence of what you love to do, and do extraordinarily well. Everyone has their Unique Brilliance, yet most people never realize what theirs is or how to use it.

Here are a few examples:

"My Unique Brilliance is I ignite passion and action!"

"My Unique Brilliance is I spark greatness."

"My Unique Brilliance is I sparkle the divine."

"My Unique Brilliance is I energize possibility."

"My Unique Brilliance is I sing the song of my heart."

One of the great things about your Unique Brilliance is that it’s been with you since you were born...really! So let me ask you:

1. What did you LOVE to do as a kid?

2. What are the words and/or qualities that describe that? (Hint: think about what you loved to do as a kid meant for you).

_________________  ___________________  ___________________
_________________  ___________________  ___________________
_________________  ___________________  ___________________
Creating Your Unique Brilliance Statement

Your final Unique Brilliance statement is 6-8 words. Here’s how it looks:

"I ___________________________"  
(verb)

For example, mine is, “I ignite passion and action!”

Remember that every part of you should say, "Yes!" when you read your Unique Brilliance out loud!

GUIDELINES:

• Your Unique Brilliance statement will not mention “others” or “people.” This is because it’s something that is true for you no matter WHAT you are doing or WHO you are with.

• Your Unique Brilliance statement will not describe steps or process.

    For example, it would NOT look like this: “My Unique Brilliance is I create powerful transformation by seeing someone’s essence and coaching them ...”

    Think simple! Instead it may be, “My Unique Brilliance is I create powerful transformation!”

• Test your Unique Brilliance statement by thinking of a time when you were absolutely, positively at your best. Were you using your Unique Brilliance?
Unique Brilliance Verb List

Since your Unique Brilliance statement starts with a verb, here is a list to help spark your thinking and ideas (remember this is only a partial list so feel free to create your OWN verb!):

<table>
<thead>
<tr>
<th>Spark</th>
<th>Evoke</th>
<th>Compose</th>
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<tbody>
<tr>
<td>Sparkle</td>
<td>See</td>
<td>Discover</td>
</tr>
<tr>
<td>Ignite</td>
<td>Awaken</td>
<td>Design</td>
</tr>
<tr>
<td>Inspire</td>
<td>Demand</td>
<td>Lead</td>
</tr>
<tr>
<td>Create</td>
<td>Hold</td>
<td>Express</td>
</tr>
<tr>
<td>Provoke</td>
<td>Sing</td>
<td>Influence</td>
</tr>
<tr>
<td>Do</td>
<td>Accomplish</td>
<td>Empower</td>
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<tr>
<td>Take</td>
<td>Align</td>
<td>Innovate</td>
</tr>
<tr>
<td>Listen</td>
<td>Achieve</td>
<td>Nurture</td>
</tr>
<tr>
<td>Build</td>
<td>Catalyze</td>
<td>Navigate</td>
</tr>
<tr>
<td>Capture</td>
<td>Deliver</td>
<td>Motivate</td>
</tr>
<tr>
<td>Change</td>
<td>Perfect</td>
<td>Reveal</td>
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<tr>
<td>Revitalize</td>
<td>Shape</td>
<td>Transform</td>
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<tr>
<td>Teach</td>
<td>Uphold</td>
<td>Visualize</td>
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</tbody>
</table>
Bonus Exercise: Embracing Your Unique Brilliance
(Intuitive Coaching Toolkit™)

My Unique Brilliance Is:

For Me To Be At My Best I Need:

Environment

Time

Support

Energy

Sound

Feeling of

Actions I will take are:

Action: By When:

Action: By When:

Action: By When:
STEP #3: Branding With Archetypes® Visualization

You’ll be surprised and delighted at how easily you remember all of the information you learn during this visualization, even once it’s complete. So you can trust your other than conscious mind to remember exactly what is important to remember.

Close your eyes...Allow yourself to imagine walking into a lovely courtyard setting, and you notice that it’s set up as if to receive someone very important. As you walk closer you see in front of you a line of people, with happy, welcoming smiles on their faces. As you move closer you notice these people are clients... people you have worked with and also even people you have yet to work with.

All are lined up, as if in a receiving line and you realize that the person they are so happily waiting for is you.

As you walk towards them to connect or reconnect with them the first person in line gives you a warm welcome, maybe even giving you a hug of gratitude, saying thank you so much! You move on to the next person, who is so happy to thank you that you even blush a little bit, even as you feel overjoyed at seeing how well they are now doing.

As you move down the line to the next person you are once again greeted with a “Thank you” and then they pause, look you in the eyes and they remind you, “Before I met you, I was really stuck or struggling with...” and you hear them describe what their situation was that was so difficult for them that they just knew they had to do something about it. The emotion they feel as they tell you about their past struggle is clear to you.

It all comes back to you as they paint such a vivid picture of what their challenge was. And they even share details with you that you hadn’t known before.

The two of you take a moment to celebrate how much different their life or business is now. The change is quite dramatic. Inspired, they begin to tell you, “The biggest change in my life has been_____” and you hear them tell you with so much excitement and gratitude exactly what’s different for them now because of your work together.

You thank them in return for sharing so much with you, then you move on to the next person in line, who, like the others is so happy to see you.

They too, begin to tell you how different their life or business is now. You hear their voice say to you, “Before I was struggling with” and then hear them describe what their situation was that was so difficult for them that they just knew they had to do something about it.
It's clear they want to tell you more and so they do. Then they start to get really specific with you and tell you the details of how different their day-to-day life is now that they've worked with you. You’re watching their happy face as they share with you how their life, their work or their business are so different now. Even how their home life and relationships with others has changed and most importantly, how they feel now compared to before they worked with you.

The emotion they feel as they describe how different their day-to-day life is now is clearly stamped on their face.

You’re amazed! Because even though you know you are good at what you do and that you love what you do, you had no idea how utterly impactful your work has been for these people.

You realize this couldn’t be true for just this one person, you realize that every single person who can’t wait to talk with you must have results just like these!

As you continue to move through the line you’re hearing more and more about the results your satisfied clients are so happy to have received from working with you.

As you get to the end of the line you find yourself turning around, looking back, and taking a moment to notice all of these people. You notice what is so similar about them that you can clearly see they are your community. In fact, you notice details about them that you’d never noticed before.

From where you are now, you realize that there is something you are so passionate about that it’s something you are a stand for, no matter what. In fact, this is often something that you may have struggled with yourself in the past, overcome, and now want to be sure no one else has to struggle with like you did!

As you look back at all those happy, satisfied people you’ve helped, what is it you realize you are an expert at or in?

As you look back at the rows of happy, appreciative faces, and you think back to where you started, what decision did you have to make?

What permission did you give yourself?

What did you let go of?

Your other than conscious mind can easily remember all the information, awarenesses and learning you’ve had and can easily make it available to you anytime you want.

Allow your eyes to gently open as you return, refreshed and feeling complete.
Use the guided *Branding With Archetypes®* visualization to coach your client to journal answers to the following questions quickly and easily. (using all that they remember seeing, feeling, sensing and hearing during the guided visualization)

- Who were the people who were so excited to see you and thanked you so profusely for helping them?
- What did these happy, appreciative people thank you for, from the bottom of their heart?
- Were they men or women? What age range were they? What was so similar about them that you could clearly see they were a “community?”
- What did they tell you they had been struggling with or were stuck on before they worked with you?
- What was the emotion they seemed to be filled with during their struggle or stuck-ness?
- When they looked you in the eyes, what did they tell you was the biggest change for them in their life/business, all thanks to you and your amazing gifts?
- What were the details they shared with you about how different their day-to-day life/business is now that they’ve experienced the magic of working with you?
- What did they tell you are the results they are so happy to have now since they worked with you?
- What were the emotions they were now feeling so deeply as they thanked you for their results?
- What is the one thing you now know you are a passionate stand for, no matter what? (This is often something that you may have struggled with yourself in the past, overcome, and now want to be sure no one else has to struggle with like you did!).
- As you look back at all those happy, satisfied people you’ve helped, what is it you realize you are an expert at or in?
- As you look back at the rows of happy, appreciative faces, and you think back to where you started, what decision did you have to make?
- What permission did you give yourself?
- What did you let go of?
STEP #4: Creating Your "I am a Stand For" Statement

Write what you are a stand for in your business.

Examples:

“I am a stand for people loving who they are and what they do, no matter what!”

“I am a stand for people saying “yes” to themselves, no matter what”

“I am a stand that if you just do it, you CAN do it!”

“I am stand for making people feel welcomed and part of a community”

I am a stand for

STEP #5: Creating Your "I am an Expert" Statement

Write what you are an expert in or at in your business.

Examples:

“I am an expert at inspiring people to decide and take action”

“I am an expert at making people beautiful”

“I am an expert at creating relationships”

I am an expert
STEP #6: Make Your Brand Promise

A promise is a commitment, a pledge and an agreement. Your Brand Promise tells your market that you can be relied upon to deliver a consistent experience regardless of the particular program, product or event.

Your Brand Promise is **Specific, Emotional** and usually includes naming your ideal client.

**Examples of a Brand Promise:**

“**I use personal color and clothing to provoke women entrepreneurs to say “yes” to themselves no matter what!”**

“I turn managers into coaches so there is harmony in the workplace.”

“I mentor high-achieving entrepreneurs into the spotlight so they can live the life they desire and deserve”

“I passionately innovate how women entrepreneurs market their business so they create money with soul.”

“We use the magic of the theater experience to help autistic kids soar to success!”

**Now, what is it that your business promises to deliver?**
STEP #7: Create Your Brand Brilliance Values

Using Your SIGNATURE Archetype

Step 1: Choose 1 of your MOST developed strengths and 1 of your LEAST developed strengths, then brainstorm 1-3 words/ short phrases, using these questions as your guide:

- What does this strength mean for me?
- What is important to me about this strength?
- What do I value about this strength?

Most Developed Strength: _____________________

Least Developed Strength: ______________________

Step 2: Choose your top key word or phrase for your Signature Archetype from the choices above and enter it in the box below. Congratulations! This is one of your Brand Brilliance Values.
Using Your INFLUENCING Archetype

Step 3: Choose 1 of your MOST developed strengths and 1 of your LEAST developed strengths, then brainstorm 1-3 words/ short phrases, using these questions as your guide:

- What does this strength mean for me?
- What is important to me about this strength?
- What do I value about this strength?

Most Developed Strength: _____________________

Least Developed Strength: ______________________

Step 4: Choose your top key word or phrase for your Influencing Archetype from the choices above and enter it in the box below. Congratulations! This is one of your Brand Brilliance Values.

Step 5: To complete the exercise, write your Brand Brilliance Values from Step 2 and Step 4 on your Soul Of Your Brand Guide.
STEP #8: Create Your Brand Soul Client Experience

What does your Signature Archetype BELIEVE is possible for your clients?

What does your Influencing Archetype BELIEVE is possible for your clients?

What does your Signature Archetype not TOLERATE in your clients?

What does your Influencing Archetype not TOLERATE in your clients?

When my clients are INITIALLY investigating services like mine they are feeling...

Frustrated about:

Overwhelmed with:

Desiring:
When my clients are CONSIDERING my services I want them to:

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<th>FEEL</th>
<th>(Ex. Result they will get, your expertise)</th>
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<td>about</td>
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When my clients first SIGN ON with me I want them to:

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<tr>
<th>FEEL</th>
<th>(Ex. their decision, their first step)</th>
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<td>about</td>
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## Brand Feeling List

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<th>Affirmative</th>
<th>Amazed</th>
<th>Ambitious</th>
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<td>Cheerful</td>
<td>Converted</td>
<td>Convinced</td>
<td>Courageous</td>
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<td>Determined</td>
<td>Empowered</td>
<td>Encouraged</td>
<td>Enthusiastic</td>
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<tr>
<td>Exhilarated</td>
<td>Hopeful</td>
<td>Independent</td>
<td>Loyal</td>
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<tr>
<td>Optimistic</td>
<td>Persuaded</td>
<td>Positive</td>
<td>Proud</td>
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<tr>
<td>Secure</td>
<td>Sure</td>
<td>Strong</td>
<td>Triumphant</td>
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<tr>
<td>Trusting</td>
<td>Upbeat</td>
<td>Blissful</td>
<td>Peaceful</td>
</tr>
<tr>
<td>Carefree</td>
<td>Free</td>
<td>Comfortable</td>
<td>Complacent</td>
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<tr>
<td>Contented</td>
<td>Delighted</td>
<td>Ecstatic</td>
<td>Elated</td>
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<tr>
<td>Easy</td>
<td>Exalted</td>
<td>Excited</td>
<td>Exultant</td>
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<tr>
<td>Fantastic</td>
<td>Festive</td>
<td>Glad</td>
<td>Grateful</td>
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<tr>
<td>Inspired</td>
<td>Joyful</td>
<td>Joyous</td>
<td>Overjoyed</td>
</tr>
<tr>
<td>Lighthearted</td>
<td>Glorious</td>
<td>Magnificent</td>
<td>Playful</td>
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<tr>
<td>Pleased</td>
<td>Pleasant</td>
<td>Relaxed</td>
<td>Relieved</td>
</tr>
<tr>
<td>Satisfied</td>
<td>Serene</td>
<td>Tranquil</td>
<td>Thrilled</td>
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<tr>
<td>Brilliant</td>
<td>Comical</td>
<td>Jubilant</td>
<td>Attracted</td>
</tr>
<tr>
<td>Awed</td>
<td>Captivated</td>
<td>Curious</td>
<td>Eager</td>
</tr>
<tr>
<td>Earnest</td>
<td>Enchanted</td>
<td>Engaged</td>
<td>Enraptured</td>
</tr>
<tr>
<td>Enthralled</td>
<td>At ease</td>
<td>Fascinated</td>
<td>Immersed</td>
</tr>
<tr>
<td>Intrigued</td>
<td>Mesmerized</td>
<td>Obsessed</td>
<td>Tremendous</td>
</tr>
<tr>
<td>Amused</td>
<td>Sparkling</td>
<td>Animated</td>
<td>Spirited</td>
</tr>
</tbody>
</table>
STEP #9: Adding Personality To The Soul Of Your Brand

As a ________________ with ________________ influencing...

(Signature Archetype)  (Influencing Archetype)

If your brand were from a different TIME period, when would it be?

If your brand were a FONT, what would it look like?

If your brand were a PLACE, where would it be?

If your brand were a SONG, what would it be?

If your brand were a COLOR, what would it be?

If your brand were a TEXTURE, what would it be (crisp, fresh, soothing, luscious, etc.)?
STEP #10: Branding With Archetypes® Touch Points

- Logo
- Tagline
- Voice/Tone/Perspective
- Marketing Message
- Voice Mail Message
- Email Signature
- Brochures
- Product Packaging
- Business Cards
- Letterhead
- Newsletter
- Biography
- Thank You Cards
- Imagery
- Return Address Labels
- Website
- Trade Shows
- Signage
- Presentations
- Clothing
- Gifts
- Charity Involvement
- Publicity
- New Photos
- Alliance Marketing
- Networking
- Advertising
- Articles
- Color palette
- Fonts
- Graphics
- Social Media Posts
- Social Media Imagery
- Program Names
- Digital products
- Ideal Client Description

Touch Point #1:
Ideas:

Touch Point #2:
Ideas:

Touch Point #3:
Ideas:

Is It On Brand...
- Does this communicate the core essence of my Brand Archetypes?
- Does this deliver on my Brand Soul Promise?
- Does this reflect my Brand Soul Values?
- Does this express the personality of my brand?
Niche Breakthrough Secrets
What Is a Niche?

The **PEOPLE**
you serve

The situationally-specific **PROBLEM**
you help them solve

Your special branded **SIGNATURE SYSTEM**

The Phases Of Niche In Your Business

Phase I - Deciding on your initial niche
Phase II - Refining your niche
Phase III - Up-leveling your niche
3 Phases of Niche

PHASE I is Discovering your initial niche.

Once you start getting clients, you’ll have more clarity because you’ll be hearing and learning from your clients new areas you can help them with or new ways to apply the main thing you offer.

PHASE II is Refining your niche.

This is where you may be letting go of what you originally started out doing because along the way you’ve discovered what your core audience really wants.

Phase II can also be where you’re branching out and offering different ways of applying your core specialty. Or you’re discovering new audiences for your core specialty.

PHASE III is where you’re up-leveling your niche, taking what you do even deeper.
Niche Mindset Exercise
(Intuitive Coaching Toolkit™)

Ask your client to stand and close their eyes as you read through each of these statements. Direct your client to ask themselves, "What if this was true?" as they hear each statement.

After reading all of the mindset statements ask your client, "What was it like to hear each of these statements as if they were true?"

To complete this exercise coach your client on any statements that they felt were completely untrue, to be open to a new possibility.

Everyone in my niche loves me

I am loved, deeply loved

Everyone in my niche wants to be my friend

Everyone in my niche wants to hire me

My niche is the opening to my deeper work

Within my niche, endless possibilities are available to me

I am the solution to the problem people most want solved

Money flows to me, through other people
What Your Clients May Fear About Choosing A Niche

"I don't want to leave anyone behind."

"I may lose business or opportunities."

"What do I do with the clients I already have?"

"But everyone can use what I have to offer!"

Your Solution: Coach using the *Courageous Coaching*® Method!
6-Step Niche Breakthrough Secrets Formula

- **Step 1: CHOOSING** your lucrative category of highest potential people to work with

- **Step 2: IDENTIFYING** specific “tribes” of potential ideal clients within your category

- **Step 3: BRAINSTORMING** out of the box

- **Step 4: TESTING** for “hot or not”

- **Step 5: MAKING** your final choice and creating your marketing message

- **Step 6: GETTING STARTED** with your new niche
Niche Breakthrough Secrets Formula

Step 1: CHOOSING your lucrative category of highest potential people to work with *(Check one now)*

- **Business/Entrepreneurs**: Entrepreneurship is rapidly rising and entrepreneurs need a wide variety of services and products to support their business growth.

- **Marketing/Sales**: From small businesses to corporations, everyone wants help with marketing and sales to attract more clients and gain new business.

- **Executive/Corporate**: Executives within corporations seek out a variety of specialty services to help them advance their careers and/or the company they serve.

- **Health/Wellness/Beauty**: Everyone wants to feel better, look fabulous and be healthy, making this a potentially lucrative category to specialize in.

**TIP: Brainstorm OUTSIDE of who you normally think you would work with.**

For example, if you are a healer, brainstorm what specific problems your service can help women in corporations solve. You’ll be surprised at how this will help you “map over” what you do to new groups of people that you may not have previously thought of and help you see how your services can benefit people who have the money to pay you handsomely.
Niche Breakthrough Secrets Formula

Step 2: IDENTIFYING specific “communities” of potential ideal clients within your category

Within the category you chose, what are some of the specific groups of people? Keep an open mind and don’t decide yet if they “need/don’t need” your services.

The category I choose is: ____________________________

Potential Ideal Clients Within this Category Might Be:

_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________
Step 3: BRAINSTORMING out of the box

Brainstorm OUTSIDE of who you normally think you would work with.

For example, if you are a healer, brainstorm what specific problems your service can help women in corporations solve. You’ll be surprised at how this will help you “map over” what you do to new groups of people that you may not have previously thought of and help you see how your services can benefit people who have the money to pay you handsomely.

Review the example on the next page, then use the blank worksheet for yourself.
# Brainstorming Out of The Box

<table>
<thead>
<tr>
<th>Potential Ideal Client</th>
<th>Problem They Experience (daily is best)</th>
<th>Solution They Want Instead (HINT: Identify specific behavior, actions/situations)</th>
<th>What Do They Need To Learn/Know/Do?</th>
<th>What Is Their Ultimate Outcome?</th>
<th>What Is Their “Why?” “So they can…”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Women who want a promotion</td>
<td>Get taken seriously and seen as capable of taking on a new level of responsibility and leadership</td>
<td>To be noticed and seen as credible, how to handle increased responsibilities, more people to manage and bigger expectations. How to look the part of the new role they want. Someone to tell them where they may be sabotaging themselves in meetings, or on projects.</td>
<td>Ask for what they want. Better manage their time. Learn how to delegate with authority and confidence. Stop unconsciously giving away their power in meetings.</td>
<td>Rise to the top of their profession.</td>
<td>Prove they can do it, provide for their children and be respected by others.</td>
</tr>
<tr>
<td>Example: Women who want out of their corporate job</td>
<td>Figure out what to do next, while working full time.</td>
<td>Someone to give them permission to start something new, and give them a step-by-step plan so they know what to do first, next, etc.</td>
<td>Create an exit strategy. Clarify what they really want to do. Design/plan how to be successful once they leave their corporate job.</td>
<td>To open their own business.</td>
<td>To feel fulfilled and feel that they’re making a difference.</td>
</tr>
</tbody>
</table>
## Brainstorming Out of The Box

<table>
<thead>
<tr>
<th>(A) Potential Ideal Client</th>
<th>(B) Problem They Experience (daily is best)</th>
<th>(C) Solution They Want Instead (HINT: Identify specific behavior, actions/situations)</th>
<th>(D) What Do They Need To Learn/Know/Do?</th>
<th>(E) What Is Their Ultimate Outcome?</th>
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Niche Breakthrough Secrets Formula

Step 4: TESTING for “hot or not”

IS YOUR NICHE HOT… OR NOT?

**QUESTION #1:** Is your niche BIG enough to be viable?

It must be at least 10,000 people or more.

**QUESTION #2:** Are your ideas/services flowing upstream or downstream within the culture of your niche?

Flowing *upstream* within the culture that is already present within your niche means you are attempting to get them to change their mindset and beliefs about your topic. Flowing *downstream* means your ideas are ones your niche is likely to accept. Any time you are flowing upstream within your niche’s culture you’ll find marketing and making sales difficult, time consuming and costly.

**QUESTION #3:** How important will the people within your niche rank solving this problem?

A 10 is a “must solve now” and 1 is “I can live with it for a long time, as is.” This ranking must be a EIGHT or higher to make your niche viable for you.

1 2 3 4 5 6 7 8 9 10

**QUESTION #4:** Do the people within your niche have a history of investing in things of a similar nature to what you offer?

Remember that people will put up with a lot before they decide to invest in solving a problem. So, it’s best to focus your business on solving a problem your clients already prioritize as important.

**QUESTION #5:** Do you love them?

You will be spending a lot of time with the people in your niche, which means you need to love these people and what you are doing with them.
## Niche Breakthrough Secrets Formula

### Step 5: MAKING your final choice and creating your marketing message

Use your answers from your Brainstorming Out Of The Box worksheet to complete this description of your Niche.

<table>
<thead>
<tr>
<th>My ideal client is a (Column A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>who struggles with (Column B)</td>
</tr>
<tr>
<td>and wants to (Column C)</td>
</tr>
<tr>
<td>by learning how to (Column D)</td>
</tr>
<tr>
<td>so he/she can (Column E)</td>
</tr>
<tr>
<td>and (Column F)</td>
</tr>
</tbody>
</table>
Niche Breakthrough Secrets Formula

Step 6: GETTING STARTED with your new niche

• List 5 places where you can connect with your new niche.

• Review your offers and pricing to appeal to your new niche.

• Tell your new niche marketing message to 25 people in the next week.

• Use your new niche marketing message on your web site, social media, etc.
Signature System™
What Is A Signature System™

Think of your Signature System™ as organizing your unique process, step by step. Each step has clearly defined outcomes -- or results -- along the way.

When prospective clients see the solution to their problem laid out like this, they feel understood, they feel excited and they feel a tremendous amount of confidence you can help them.

Your Signature System™:

• Makes your expertise highly marketable
• Makes your expertise easy for your ideal clients to understand and want to hire you for
• Is an easy way to take the beautiful work you do with clients and put them into a sequence
• Makes it easy for you to talk about what you do
• Makes it easy for your ideal clients to get excited about how you can help them
• Is a dynamic, essential element of building your business
• Is easy to create
• Has the potential to radically transform your business
#1. Creating Order Out Of Creative Chaos
- Mindset: With your *Signature System™* you'll feel calm and organized about what you do, and you’re able to talk about your services with clarity and confidence.

#2. Standing Out From The Crowded Market
- Mindset: Specializing is the key to attracting new clients.

#3. Spring-Boarding One Idea Into Multiple New Offers
- Mindset: You can offer your *Signature System™* in a variety of ways, giving you freedom because you’re leveraging your time and your opportunities.

#4. Speaking And Joint Venture Opportunities
- Mindset: Your *Signature System™* positions you as an expert on your topic.

#5. Easy Marketing
- Mindset: Your *Signature System™* inspires your copywriting, blog posts, articles and more.

#6. Avoiding Bright Shiny Object Syndrome
- Mindset: With your *Signature System™* you'll be able to stay focused on what you're offering.

#7. Attracting Clients That Will Love Your Signature System
- Mindset: Transforming what you do into something that looks, feels and seems tangible is crucial.
- Mindset: Your *Signature System™* says you’ve figured everything out for your client.
- Mindset: Clients love hearing you have a step by step process because it’s focused on achieving a particular result
How to Inspire Your Coaching Client

To Love Signature System™
(Intuitive Coaching Toolkit™)

“Can I have more than one Signature System™?”

- Yes! Focus on having your CORE Signature System™ first, start marketing it, then see where additional Signature Systems™ may benefit you

- Start with your core Signature System™, which represents your business as a whole, each step within your core Signature System™ can eventually become its own Signature System™ that you create products, programs and services out of

- Your clients can go through your whole core Signature System™ over the course of a program with you, or they can experience just parts of your core Signature System™ as you spin them off and offer them separately

“I don’t know how I can get everything I know or everything I know my clients need into a Signature System™...what do I do?”

- Your Signature System™ won’t include all of your knowledge, exercises or abilities

- What’s important is to focus on only including basics for each step, so you don’t overwhelm yourself or your clients

- Remember, you’re an expert on your topic so there’s always going to be more you know how to do or can coach or teach your clients on

“I just do what I do and things happen. Every client is different. It depends on what they say, what they bring to me and where they’re at in their lives.”

- Remember, even if it FEELS like your work changes based on the specific situation of each client. You’re very likely following a particular process with each person
“What I do is so simple. Doesn’t everybody know this?”

- No, they don’t know it, and they will LOVE that you are making everything so easy and step by step for them

- Remember, your clients want help pulling everything together for them and getting them inspired to implement

- The tips or insights or knowledge you have that may seem small and obvious to YOU are not for your client

"Am I going to get bored focusing on one Signature System™ like this?"

- The answer is no way! You have tons of creative energy - the key is how you channel and direct that energy

- When you channel your creative energy into all the many creative ways to offer, deliver and market your Signature System™ you give your creativity tremendous purpose that will really pay off in your business income

"Will people get bored hearing from me about the same thing all the time?"

- What really happens is the opposite! You become this incredible expert at what you do

- The success of your business is due to getting your message out to more and more people, and your Signature System™ helps you do this

- Plus, you get more and more masterful at showing people why they need what you do. This mastery happens when you focus your energies consistently. With the mastery you’ll gain, you’ll also feel a tremendous sense of confidence.
Signature System™ Creation Script

GETTING STARTED

• You’ll need about 8 feet of unobstructed space in front of you - make sure there are no tables or chairs in your way

• If you don’t have enough space in the room where you are, you can use a hallway

• Ideally, you’ll have a view of a window where you can look out and feel a sense of spaciousness and forward movement

• You’ll also need a pen, and 10 copies of the handout called Signature System™ Creation Steps Sheet

• You’re not going to need your computer or tablet for this exercise

PART 1: What are the outcomes of your Signature System™?

Stand at the beginning of that 8 feet or so of open space in front of you, and looking ahead, imagine a line or a path out in front of you.

At the end of this path, visualize one of your ideal clients standing there...

• Bring to mind one specific person, a client you’ve worked really well with - someone who got great results working with you

• Go ahead and get a really good sense of this person, picture the expression on their face, the way they stand, their clothes... allow yourself to see this person out in front of you in as much detail as you can

• If you’re new in business and you don’t have a specific client to picture, that’s okay. You may have someone you did great work with even though you may not have been paid. Go ahead and imagine them standing there.

• Or if you’re really new and you haven’t worked with clients yet, then imagine a specific person you would love to work with.

You have the person you’re visualizing out in front of you...

• Notice how happy they are about the work you did together
• Really allow yourself to see their sense of accomplishment in the results they were able to create

• Now let me ask you, what are some of the specific results or outcomes that happened for your client?

• If I followed your client around for a day, what would I see, hear or notice is different for them as a result of working with you?

• We’re looking for results that are specific and describe in detail what happened for your client

Go ahead and write down the specific outcomes this client experienced on your first Signature System™ Steps Sheet. Take up the whole page to answer this question - write big and bold - you’re only going to write answers to one question on each of the Signature System Steps Sheets.

You can definitely have more than one end result; the most important tip to remember is to make sure any results or outcomes you accomplish for your client are very clear, specific and tangible.

Lay that Signature System™ Creation Steps Sheet on the floor at the end of the path, where you were visualizing your client standing.

Walk back to the beginning of the path so once again, you’re seeing your client a few feet out in front of you.

PART 2: What are the steps of your Signature System™?

You’re standing at the beginning of the path - out in front of you, you see your client with the outcomes they’ve created as a result of working with you.

As I ask the next question, you’re going to physically take one step forward on the path to discover the answer.

So to be clear, you won’t answer from where you’re standing now – you’ll step forward to discover the answer. This is the magic of the Signature System™ creation process. The answers we want to discover are ahead of you - that’s why you have to step into it.

The question is, what was the first thing you did with this client to help them achieve that outcome? What was the first step you took your client through to achieve that result?

• Now take a step forward to discover the answer - Step!

• Write the answer on a new Signature System™ Creation Steps Sheet
• While you’re standing here in the space of the first step you took your client through, take a deep breath and notice how you may have ideas about exercises, content or concepts you cover or things you get accomplished in this first step

• Write those down too on the handout - don’t worry about making it perfect, just jot down the ideas so you can refer to them later

• Take that page and lay it down next to you on the floor

  TIP: Each step of your Signature System™ is ideally focused on one small doable piece of your process

• Once again, as I ask the question, you’ll step forward into the space in front of you to discover the answer

• What was the next thing you did with this client? What’s the next step you took them through?

• Step forward now and discover the answer – Awesome!

• Jot down the answer that popped up for you on a new Signature System™ Creation Steps Sheet, plus any ideas that come up about exercises, content or concepts you cover within this step

• After you’ve written your notes take that Signature System™ Creation Steps Sheet and lay it down on the floor next to you

Keep picturing your client in front of you

There’s at least one more step in your process, maybe more - let’s find out!

• Once your client accomplished the first two steps, what’s the next step they took to reach their outcome?

• Step forward to discover the answer - Step!

• Write down the answer on a new Signature System™ Creation Steps Sheet, plus any ideas you may have for exercises, content or concepts you covered in this third step of your Signature System™

• Place that page on the floor beside you
COACH: Keep walking your client through the process until they’ve captured all steps they take the client through to achieve the result. There is no set number of steps you can have in your Signature System™. Usually it’s at least 3 and typically no more than 8 or maybe 10. You’ll know you’re at the end when there are no more steps a client needed to take to get the results, and you have physically stepped into the space of your client’s end results.

Once you’re at the end, turn around and look back at each of the steps your client took with you to achieve their results.

Leave your Signature System™ Creation Steps Sheets where they are on the floor and let’s go to the final step

PART III Review your Signature System™

- Walk back to the beginning, where the first piece of paper is lying on the floor
- Step by step, walk through what you’ve written on each of your Signature System™ Creation Steps Sheet on the floor
- Don’t try to rethink it. Just walk it through as is, and really FEEL it

Listen to your intuition here as you check for these things:

- Is the order correct?
- Does one step need to be broken down into smaller steps?
- Is there a step that maybe isn’t enough on its own and can be condensed?
- Does the Signature System™ feel complete?

Congratulations! You’re ready to transfer each of your Creation Step Sheets onto your Signature System™ Template.
Signature System™ Creation Tips

If at any time your client feels unclear about the answers they get, or if they feel they may have missed a step, coach them to:

- Walk backward to the step where they were clear, stand on that spot and re-focus by looking ahead toward the end result their client got from working with them. Take a breath in…and let it out

- Recap the previous steps including the one they’re on so they feel clear and anchored with where they are so far

- Looking ahead at the end results their client got ask them, “What is the next step your client needs in order to achieve the result they want?” Then ask them to take their step forward, and they’ll find the answer

TIP: Remember, if your client is struggling you can always ask them to step off the Signature System™ "line" into the empowered position of observer and from there you coach them to get clear about any part they were stuck or confused about. Once they are clear, ask them to step back onto the line and continue with the Signature System™ process.

If it feels like your client is trying to put too many pieces into a single step, ask them, “Should this be broken out into more than 1 step?”

- The answer is yes if they are including more than one concept or teaching more than one piece of content

- If that’s the case simply divide it into 2 steps, write them down on the handout sheets and keep going
Coaching Script for Creating Handouts, Marketing Bullets and Titles for each Step of a Signature System

COACH: The ideal time to coach your client through this exercise is when your client has completed their core Signature System™. Each Action is best completed for all steps before moving on to the next action.

Action #1. Add Value To a Signature System™ With Handouts & Materials

People love handouts, checklists and done-for-you materials because it makes what you do even more complete and easy for your clients to understand.

Handouts are always a valuable resource for people and they are very enticing to talk about when talking with a potential client, or to list out when giving a presentation.

Review your notes for each step of your Signature System™ and brainstorm a list of handouts, checklists or other materials that will be a companion for these steps.

Write them on your Signature System™ Template for each step.

If desired, you can assign a value to each handout or checklist. This increases the overall value of your offer to your ideal client.

Action #2. WRITING MARKETING BULLETS

You’re going to draft 2 to 4 marketing bullet points for each step of your Signature System™. You’ll use these marketing bullet points everywhere in your marketing.

These marketing bullet points describe what transforms for your clients as a result of that particular step.

One way to make this easy is to brainstorm the outcomes for each particular step of your Signature System™.

Here’s a great tip for writing your bullets: Start with a verb

Brainstorm your marketing bullets just for the first step of your Signature System™ and write them on your Signature System™ Template
Action #3. TITLING EACH STEP

You’re now ready to roll up the marketing bullets into a title for this step of your Signature System™.

Here is how you do this: What does this step of your Signature System™ help your client achieve, or what problem does it solve?

Use the answer to create the title for your first step and write it on your Signature System™ Template.
Signature System™ Creation Steps Sheet

STEP #____:

NOTES: (exercises, content, concepts, etc.)
Your Signature System™ Template

Overall Title of Your Signature System™

STEP 1 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

- 
- 
- 
- 

Step #1 Title:
STEP 2 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

•
•
•
•
•

Step #2 Title:
STEP 3 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

•
•
•
•
•

Step #3 Title:
STEP 4 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

•
•
•
•
•

Step #4 Title:
STEP 5 of Your *Signature System™*

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

•
•
•
•

Step #5 Title:
STEP 6 of Your *Signature System™*

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

- 
- 
- 
- 
- 

Step #6 Title:
STEP 7 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

•
•
•
•
•

Step #7 Title:
STEP 8 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:
•
•
•
•
•

Step #8 Title:
STEP 9 of Your Signature System™

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

•
•
•
•
•

Step #9 Title:
STEP 10 of Your *Signature System™*

Notes: (exercises, content, concepts, etc.)

Handouts & Materials

Marketing Bullets:

- 
- 
- 
- 

Step #10 Title:
Profit Pyramid
Profit Pyramid

Celebrate!

High-End
Accelerate

Leverage
Synergy

Intensive
Magnify

Do It Yourself
Engage

Discovery Sessions
Enroll

Keep In Touch
Connect

Who You Serve

Problems You Solve

Results Clients Achieve

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Profit Pyramid Creation Checklist

Helping clients design their Profit Pyramid is one of the most fun, creative and powerful ways you can support your clients to achieve amazing success...and makes YOU stand out from any other marketing coach!

- Describe the Profit Pyramid concept to your client

- Describe to your client the "sweet spot" which is when someone goes from interested to invested

- Start with an inventory of what your client currently offers including the detail of what's included in each offer.

- Watch for where your client is over delivering and/or giving too much of their time at too low of a level.

- In creating the Profit Pyramid with your client, start at the TOP, identifying the basics of their high-end offer including type of offer, number of estimated clients and an approximate amount to charge per client.

- Next, identify the basics of their free "keep in touch" offer including type of offer and subject.

- Then, identify the basics of their free "discovery session" offer including where are the opportunities to generate discovery sessions, what topic connects their discovery session to both the "keep in touch" offer and high-end offer, and what is their goal for the number of discovery sessions they will have during a month.

- Write estimated revenue amounts in the margin for each offer on the pyramid.
Money Tracking Sheet
“Good Fortune Flowing In”

Month: _______________  60-Day Bold Money Goal: $______________

1st  $  17th  $  2nd  $  18th  $  3rd  $  19th  $  4th  $  20th  $  5th  $  21st  $
6th  $  22nd  $  7th  $  23rd  $  8th  $  24th  $  9th  $  25th  $  10th  $  26th  $  11th  $
12th  $  13th  $  14th  $  15th  $  16th  $  17th  $  18th  $  19th  $  20th  $  21st  $
22nd  $  23rd  $  24th  $  25th  $  26th  $  27th  $  28th  $  29th  $  30th  $  31st  $

Grand Total: $____________,__________

# Speaking Gigs Booked  ____________________________
(Goal • Actual)

# of Audience Members Speaking To
__________________
(Goal • Actual)

# Collaboration Partners Committed  __________________
( Goal • Actual)

# Discovery Sessions Booked  ____________________________
( Goal • Actual)

# Discovery Sessions Delivered  ____________________________
( Goal • Actual)

# New Clients  ____________________________
( Goal • Actual)

# People On My List  ____________________________
( Goal • Actual)
Bold Money Goal

My _________ Income Goal is:

$

My 60-Day Bold Money Goal is:

$

To meet my Bold Money Goal, I have the courage to:
How To Create Packages That Sell Themselves
Steps To Create Your Package

1. Create Your Package Promise
2. Create Your Inventory
3. Categorize Your Inventory
4. Turn Your Inventory Into Packages
5. Choose Your Pricing
Create Your Package Promise

Your Package Promise is the core, specific reason WHY someone will want to sign up as your client. It is NOT the specific program components you’ll include.

✓ It solves a specific, tangible problem your ideal client knows they have
✓ It solves a specific, tangible problem your ideal client is willing to invest in to solve

Start by thinking of your ideal client...

The PROBLEM they experience (daily is best) "How do they..."

The OUTCOME they want instead (List specific actions or expertise) "When what they really want is..."

What is the COST of not solving this problem?

What do they need to learn, know or do?

What is their "WHY"? "So they can..."

My Package Promise is to help my clients (solve the problem of) ____________________
___________________________________________________________
so they can (Outcome or Why) ____________________
___________________________________________________________.

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Create Your Inventory

Brainstorm every component you include with your services.

Write down each component on a Post-it® note or index card. Include the extra, little things you do that your clients may not even realize. It all counts!
Categorize Your Inventory

Each of your packages should include one item (or more) from each of these four categories:

**1 CREATE MOMENTUM**

Get your clients started generating results immediately so they feel the value of their investment. This is a key moment where they are inspired and ready to take action, so help them make the most of it!

- Initial VIP Day (Live or Virtual)
- Group retreat/seminar
- Assessment or questionnaire
- Private topic-specific strategy/kick-start consultation
- Starter checklist
- Home-study course
- Special report

**2 INCLUDE EXPERTISE/TRAINING**

Clients love topic-specific, how-to training so look for easy ways you can deliver your expertise. Plus you can include handouts, exercises and activities. Remember, you can also include trainings provided by other resources.

- Done-for-You forms, templates, checklists, scripts, etc.
- Examples of written materials you've used to achieve results
- Training/Teaching on specific topics
- Other:____________________________________________________
Categorize Your Inventory

3 INCLUDE DELIVERY

This is the "how" of how you deliver the results clients are investing in. These are the elements that require your time. Less is more!

- Private Coaching or Consulting
- VIP Day (Live or Virtual)
- Q&A calls if offering a group package
- Short, emergency check-in calls
- Facebook Group
- Email
- Reviews/Evaluations
- Seminar/Retreat

4 ADD BONUSES

Bonuses add significant value to your program and inspire people to say “Yes!” to your offer.

- Topic-specific virtual intensives
- “Pay in full” bonuses can include topic-specific teleseminar/webinar/video training
- Done-for-you materials, examples, templates, scripts, checklists
- “Fast action” bonuses can include additional assessments or trainings
- Books/Journal
- Recordings of training and Q&A calls (for group programs)
- Live event ticket
Categorize Your Inventory

1. CREATE MOMENTUM

2. INCLUDE EXPERTISE

3. INCLUDE DELIVERY

4. ADD BONUSES
Create Your Package Template

Package Promise:

Title:

- 90-Day
- 6-Month
- 12-Month
- VIP Day
- Other: ________________

Create Momentum

Include Expertise/Training
### Include Delivery

### Add Bonuses

### Price Your Package

<table>
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<th></th>
<th>Full Pay Investment</th>
<th>Full Pay with Quick Decision Savings</th>
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<tbody>
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<td></td>
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<table>
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<tr>
<td>No. of Pmts:</td>
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<td># _____________</td>
</tr>
<tr>
<td>Monthly Pmt:</td>
<td>$ _____________</td>
<td>$ _____________</td>
</tr>
</tbody>
</table>
Simple Steps To Create A Platinum Package

1. Why people will invest in a high-end package

2. Create your Platinum state of mind

3. Create your Platinum package promise

4. Create your inventory

5. Categorize your inventory

6. Turn your inventory into a Platinum package

7. Choose your pricing

8. Create a Platinum program letter explaining the benefits and what’s included

9. Follow simple steps to enroll your Platinum Program
Why People Will Invest In A High-End Program With You

1. You are worth MORE than you realize!

2. People want your expertise, attention and support focused on THEM

3. The expertise you take for granted is PRICELESS for your clients

4. People want and need to feel ALL IN and making a higher-investment kicks their butt to do that

5. EVERY business has the opportunity to offer a Platinum level service

6. Statistically, approximately 20% of your clients will HAPPILY invest in a Platinum service

7. The RESULTS clients get from their transformation are worth many times MORE than what they are investing with you

8. People aren’t investing IN you; they are investing in themselves THROUGH you
1. Create A Platinum State of Mind About Your VALUE

It’s time to stop discounting YOU and your accomplishments, wisdom, knowledge and experience.

Set a timer for 8 minutes and brainstorm EVERYTHING about your brilliance ...

Be sure to include:

- Skills and talents you’ve developed over time
- Books you’ve written or contributed to
- Positions you’ve held
- Degrees, schooling, graduating in high standing
- Awards you’ve won, regardless of the topic
- Trainings, areas of study you’ve immersed yourself in over time
- Life experiences or situations you’ve overcome
- Natural skills and talents
- Skills and talents you take for granted because they’re easy for you
- What clients and people value about you
- What you value and appreciate about yourself
- What you’ve created
- What you’re proud of having accomplished

With this list in hand, and the other hand on your heart, stand up and say each item out loud, savoring everything about you that you’re now recognizing as amazing and magnificent!
2. Create A Platinum State of Mind ENVIRONMENT

If a Platinum client walked into your office area right now, what would they think?

You don’t need to buy or own expensive things to begin upgrading your environment. But you DO need to get rid of anything and everything that is old, worn, shabby, torn, frayed, broken, stained, scuffed, stretched out, faded or in any other way is “not Platinum”.

By the end of this weekend, get rid of everything that is not Platinum! This includes clutter (box it up for now rather than getting caught up in sorting/organizing).

You’re going to feel like you’ve dropped 30 pounds of emotional weight...and gained a sense of your growing Platinum value!

(The more ruthless you are about this exercise, the better you’re going to feel!!)

Finish your “Platinum Sweep” by adding something beautiful to your office or your wardrobe.
3. Create Platinum State of Mind SELF-TALK

Would you speak to a cherished friend the way you speak to yourself? Would you allow someone you love to continuously say negative statements to themselves?

Grab a notebook or journal and for one day, write any statements or questions that you say to yourself, that make you feel disempowered or doubtful, or in any way sound negative.

For example:

- “My clients won’t pay that”
- “That won’t work for me because…”
- “I can’t afford it”
- “I can’t because…”

Once you have your journal list of negative self-talk, you can begin to create a shift simply by asking, “What if I could?”

The key is to open your mind and heart to what IS possible (not what you’ve been told or have been mistakenly programmed to think).
4. Create Platinum State of Mind SELF-WORTH

How much is the most you’ve ever charged for your service?

$  

Now put a zero on the end of it.

As someone who charges that amount, what do you focus on during your day?

As someone who charges that amount, what do you wear?

As someone who charges that amount, what do you delegate?

As someone who charges that amount, what do you get rid of in your environment?
As someone who charges that amount, what do you no longer put up with?

As someone who charges that amount, what is one way you powerfully allow yourself to show up with your clients?

As someone who charges that amount, who are your colleagues?

As someone who charges that amount, who is your mentor?
Platinum Packages Bonuses Checklist:
Include Special Platinum Star Treatment

Look for all the ways you can help your Platinum clients feel special and valued.

- Private car service to/from airport and retreat hotel
- Tickets to your event
- Attendance by a spouse, partner or key employee at retreats/events
- Priority consideration for your other offers
- Gifts or special savings on upcoming trainings
- Goody bag at retreats or sent to them if giving a virtual VIP Day
- Magazine subscription
- Books sent quarterly
- Special seating and special dinner/breakfast at your event

Even if you’re in the beginning stages of growing your list you can provide visibility opportunities for your clients. People love to be seen, so build this into your program.

- Special recognition in your newsletter
- Promotion opportunities to your list (if appropriate)
- Articles about your Platinum clients featured in your newsletter
- Interviews (video or written) with your Platinum clients posted on your blog and sent to your list
- Recognition at your events and opportunity to be on stage
Create a Platinum Program Letter
Explaining the Benefits and What’s Included

Dear _________________,

**Introduction**

- Briefly explain WHO this program is for
- Briefly explain the PROBLEM this program solves
- Briefly explain WHY you created this program
- Briefly give a clear WHY NOW reason
- End with a strong, clear “you can do this” statement

**How To Apply**

- Briefly describe the application process
- Be clear how to apply and include links and contact information
- Boldly include limiters of number of spaces, cut off dates and quick decision bonuses
- Include call to action and why waiting will be painful

**Testimonial**

**List Results (Outcomes) Your Clients Can Achieve From This Investment**

- Start with an action word (verb) and briefly – but SPECIFICALLY – describe the results
- Use bullets to make this list easy to read and avoid listing your process or any “how-to”

**Testimonial**
List What Is Included In The Program

○ List the title of the individual program component, the “so you can…” benefit for your client, and its value

Program includes #1: ________________________________
So You Can: ________________________________
Value: $ __________________

Program includes #2: ________________________________
So You Can: ________________________________
Value: $ __________________

Program includes #3: ________________________________
So You Can: ________________________________
Value: $ __________________

Program includes #4: ________________________________
So You Can: ________________________________
Value: $ __________________

List The Bonuses Included In The Program

○ List the title of each bonus, the “so you can…” benefit for your client, and its value

Bonus #1: ________________________________
So You Can: ________________________________
Value: $ __________________

Bonus #2: ________________________________
So You Can: ________________________________
Value: $ __________________
When You Invest In Full, You’ll Receive These Additional Bonuses

○ List the title of the Full Pay bonus (if you have one), the “so you can...” benefit for your client, and its value

Full Pay Bonus: _______________________________________________________
So You Can: __________________________________________________________
Value: $ _________________________

When You Apply Before Cutoff Date, Receive These Additional Bonuses

○ List the title of the Quick Decision bonus (if you have one), the “so you can...” benefit for your client, and its value

Quick Decision Bonus: ___________________________________________________
So You Can: __________________________________________________________
Value: $ _________________________

Testimonial

Who This Program Is A Fit For

○ List specific qualifications and characteristics of who they have to be
○ List specific qualifications and characteristics of who they can’t be
○ List what, if accepted, their commitment is

Testimonial

Tell Them How And Why To Apply

○ Be emotional, direct and ask your prospective client to step up
○ Remind them why NOW is their time and why waiting is risky
○ Remind them what gets to happen for them “on the other side”

About You Page

○ Briefly give your bio
Enrolling Your Platinum Program

Discovery Session Method

With this method, you are not requiring your peeps to first apply before speaking with you.

**Advantage**: More people will schedule Discovery Sessions, giving you an opportunity to make downsell offers such as a VIP Day if Platinum is not right for them.

**Alternative**: In the Discovery Session, invite them to apply, then send Letter, Application, Payment Form, Program Agreement and schedule a follow-up appointment while you’re still in the Discovery Session.
Enrolling Your Platinum Program

Letter & Application Method

With this method, you are requiring your peeps to first apply before speaking with you.

**Advantage:** Since they have to apply before talking with you, you’ll be interviewing fewer (and often, better qualified) potential clients.
Coaching Business Sample Platinum Blueprint #1:  
6-Month Private Platinum Program

Momentum
✓ One private VIP Day retreat (Live or virtual)

Services
✓ One private visioning/kick-start session
✓ Ten 30-minute private calls
✓ Three 10-minute emergency coaching calls

Content
✓ Four pre-recorded training calls
✓ Platinum Monthly Accountability Journal

Special Platinum Star Treatment
✓ Priority email access for quick questions and feedback during your program
✓ Private car service to/from airport and retreat hotel
✓ Tickets to your event
✓ Attendance by a spouse, partner or key employee at retreats or events
✓ Gifts or special savings on upcoming trainings
✓ Special seating and meals at your event
✓ Recognition at your events
✓ Article about your client in your ezine
✓ Video or audio interview of your client on your blog/in ezine

Bonuses
✓ Program Resources/Products: such as Sacred Money Archetype® cards
✓ Examples, checklists & templates, done-for-you materials
Coaching Business Sample Platinum Blueprint #2:  
12-Month Private Platinum Program

Momentum
✓ One Private VIP Day Retreat at Month 1 (Live or virtual)
✓ One Private VIP Day Retreat at Month 7 (Live or virtual)

Services
✓ One private visioning/kick-start session
✓ Twenty-two 30-minute private calls
✓ One in-depth call to review client’s materials
✓ Four 10-minute emergency coaching calls

Content
✓ Ten training calls and transcripts of training calls
✓ Platinum Monthly Accountability Journal

Special Platinum Star Treatment
✓ Priority email access for quick questions and feedback during your program
✓ Private car service to/from airport and retreat hotel
✓ Tickets to your event
✓ Attendance by a spouse, partner or key employee at retreats or events
✓ Gifts or special savings on upcoming trainings
✓ Special seating and meals at your event
✓ Recognition at your events
✓ Article about your client in your ezine
✓ Video or audio interview of your client on your blog/in ezine

Bonuses
✓ Program Resources/Products: such as Sacred Money Archetype® cards
✓ Examples, checklists, templates, scripts, done-for-you materials
Coaching Business Sample Platinum Blueprint #3: 6-Month Platinum Group Program

Momentum
✓ One private kick-start call
✓ Group virtual intensive

Services
✓ One-day live in-person group retreat
✓ Six live group Q&A calls
✓ Facebook group

Content
✓ Four live group training calls
✓ Weekly assignments

Special Platinum Star Treatment
✓ Gifts or special savings on upcoming trainings
✓ Tickets to your event
✓ Attendance by a spouse, partner or key employee at retreats or events
✓ Gifts or special savings on upcoming trainings
✓ Special seating and meals at your event
✓ Attendance by a spouse, partner or key employee at retreats or events
✓ Recognition at your events
✓ Special master mind meeting at your event (in the evening or at a lunch)

Bonuses
✓ Monthly Accountability Tracking
✓ Recordings of all training and Q&A calls
✓ Books sent quarterly
✓ Fast Action bonus of a home study course (yours or a partner’s)
Coaching Business Sample Platinum Blueprint #4: 
12-Month Platinum Group Program

Momentum

✓ One private kick-start call
✓ Group virtual intensive

Services

✓ One-day live in-person group retreat
✓ Twelve live group Q&A calls
✓ Facebook group

Content

✓ Ten live group training calls

Special Platinum Star Treatment

✓ Gifts or special savings on upcoming trainings
✓ Tickets to your event
✓ Attendance by a spouse, partner or key employee at retreats or events
✓ Gifts or special savings on upcoming trainings
✓ Special seating and meals at your event
✓ Attendance by a spouse, partner or key employee at retreats or events
✓ Recognition at your events
✓ Special master mind meeting at your event (in the evening or at a lunch)

Bonuses

✓ Monthly Accountability Tracking
✓ Recordings of all training and Q&A calls
✓ Books sent quarterly
✓ Fast Action bonus of a home study course (yours or a partner’s)
How To Charge What You’re Worth And Get It!®
How To Charge What You’re Worth And Get It!®

Step #1 - Mindset
Empowered Pricing Paradigm
Empowered Pricing Paradigm Visualization Script

Step #2 - Value
Standing In The Truth Of Your Value
30 Results My Clients Experience From Working With Me

Step #3 - Cost
Cost Planning Worksheet
Is The Juice Worth The Squeeze — What Is Your Time Worth?

Step #4 - Decide
Easy Pricing Guide
Easy Pricing Template
Easy Pricing Example
Pricing Do's & Don'ts

Step #5 - Anchor
Double It Exercise
Mirror Test
Stepping Into Your New Pricing Exercise

Step #6 - Validate
Attract More Clients With A Compelling Guarantee
Creating Social Proof to Validate Your Fees
Sample Testimonial Questions

Step #7 - Debut
Tips For Debuting Your New Pricing
Empowered Pricing Paradigm

SPIRIT
"When I charge what I am worth, ________________________________ ."

BELIEFS
"What would I have to believe to charge what I am worth?"
• __________________________________________
• __________________________________________

VALUES
"What do I value about my fees?"
• __________________________________________
• __________________________________________

FREEDOM
"By valuing these things I am free to..."
• __________________________________________
• __________________________________________

ACTIONS
"The actions I will take when pricing my programs, products or services are..."
• __________________________________________
• __________________________________________

BOUNDARIES
"Who or what do I let go of?"
• __________________________________________
• __________________________________________

ENVIRONMENT
"My environment reflects my fees by..."
• __________________________________________
• __________________________________________

MARKETING
"The steps I take with my marketing materials to validate my fees are..."
• __________________________________________
• __________________________________________
“Empowered Pricing Paradigm” Visualization Script
(Intuitive Coaching Toolkit™)

This exercise works brilliantly to help you immediately create a new perspective about your fees. It works because it allows you to press reset on your paradigm about pricing.

Paradigms define our model of the world. They define our comfort zone and because of that, paradigms have edges to them and are not very flexible. But the good news is that they’re very easy to change, on the spot.

When someone is feeling afraid or they don’t want to step into something new, what they’re experiencing is being at the edge of their comfort zone, or paradigm.

This Empowered Pricing Paradigm exercise is designed to help you connect with what you charge, at a deeply personal level so that you feel strong, courageous and unstoppable with what you charge.

How you feel about your fees impacts how you present your services and make your offers, which ultimately results in you getting more yeses and opening the door of opportunity to work with more of the types of clients that up-level you and your business.

Your fees even determine how credible you’re seen as being in the eyes of your prospective clients, earning you their respect and appreciation which makes this training even more important to you and your business.

The exercise I’m going to lead you through is designed specifically for you if you’re providing any type of professional service. This is for you if you want to feel confident, in alignment and congruent with charging what you’re worth. This is for you if you want your fees to be in alignment with the incredible value that you give to your clients. And this is for you if you want to feel authentic from the inside out, with what you charge. So let’s dive in, okay?

First, make sure you have paper to write on and a pen or pencil. As I walk you through this exercise you’ll be taking notes.

This exercise works because you’re going to experience it physically so stand up and find a space in the room where you are, where you can take eight steps forward. They don’t have to be big steps. They can be small steps as long as you have enough space. Make sure that nothing is in the way. You want to be able to step forward without anything blocking you.

Now...Take a nice breath, and let it out. And once again, another breathe in...and out. Allow yourself to see in your mind’s eye, a line out in front of you. At the end of that line, you see yourself. You see yourself feeling happy, feeling confident and feeling valued. You probably see yourself smiling, and you see your expression as you would imagine yourself looking when you feel empowered and loved.
This line is your path of empowering your ability to charge what you’re worth...and the first step you are going to take on your path is stepping into Spirit. This allows you to create a connection between you and Spirit so that you feel authentic about your fees. So right now, I want you to imagine your sense of Spirit out in front of you, maybe a foot or so.

As you look in that place of Spirit directly in front of you, notice everything about it. Does it have a color associated with it? Does it have a sense of heat...or coolness? And does it have a feeling associated with it? Just notice whatever represents the sense of Spirit as you imagine divine grace right in front of you.

You maybe hear the voice of Spirit or the voice of God and already feel that sense of this as you look ahead just one step in front of you. This is the presence that signifies your connection to all that is divine.

Now...I’m going to give you the beginning of a sentence, and ask you to complete this sentence. Completing it is not going to come from your head. It’s going to come from really feeling and hearing your intuitive wisdom.

When you hear me start the sentence, you’re going to take a step powerfully forward into the space of Spirit and when you do, the words to complete the sentence will immediately come to you.

Here we go. The beginning of the sentence is, “When I charge what I’m worth, I....”

Now step forward and get the answer.

Good! In this space of Spirit that you’re now standing, you are feeling and hearing with your intuitive wisdom, why charging what you’re worth is an expression of your connection to the divine. You can go ahead and write on your paper the completion of that sentence. Your first thought is probably your best thought.

“When I charge what I’m worth, I ____.”

(IF YOU WANT TO GIVE AN EXAMPLE: Mine is, “When I charge what I’m worth, I am honoring the divine within.”)

Yours may be something like that or it might be entirely different. It’s perfectly fine.

Now, with the sense of connection to Spirit about why charging what you’re worth is actually an expression of the divine coming through you, let’s find out the beliefs that support you.

The question is, “What would I have to believe to charge what I’m worth?”

We’re going to find the answer by taking a step powerfully forward again, on the count of three. One, two, three. STEP. What would you have to believe to charge what you’re worth?
You’re welcome to have more than one belief. You might have two or three. You can have as many as you need. Start each one saying, “I believe…” And make sure each is stated in the positive. Write each of these empowering beliefs down on your paper.

(IF YOU WANT TO GIVE AN EXAMPLE: I believe my time is valuable. I believe people get amazing results by working with me. I believe I am always learning and growing.)

Now, with your sense of connection to Spirit and the beliefs that support you, I’m really curious to find out what you value about your fees. So on the count of three, you’re going to take a powerful step forward into the space of Values. One, two, three. STEP.

The question is “What do I value about my fees?” These values might be single words or statements, whatever comes to you and of course, stated it in the positive.

(I’LL GIVE YOU SOME EXAMPLES: I value that when someone stretches, it creates transformation. I value that women can charge more than they realize. I value being a great value. I value being seen as top quality.)

Your values may sound different. What is important is to know what they are and to write them down.

Good!

The next piece is freedom. Being connected to Spirit, having these beliefs that support you and connect you to charging what you’re worth, and knowing clearly what you value about your fees, gives you freedom.

My question for you is, “By valuing these things, I am free to ….what?” Let’s find out on the count of three. One, two, three. STEP.

“By valuing these things, I am free to ____.” Write down as many positive statements that come to you.

(IF YOU WANT TO GIVE AN EXAMPLE: I am free to state my fee with confidence and conviction. I am free to feel good about my fees. I am free to hold people as powerful so that, yes, they can pay. I am free to create and keep my boundaries when delivering my services.)

These are just examples of the different kinds of things that I am now free to have. Whatever you have on your paper is perfect for you! Alright...good!

The next piece is action. Once again, I’m going to give you the beginning of a sentence, and you will find the answer by stepping forward on the count of three.
The actions I will take when pricing my programs, products or services are ____.

On the count of three, step forward. One, two, three. STEP.

The actions I will take when pricing my programs, products or services are ____.

Write down specific actions you can take.

(IF YOU WANT TO GIVE AN EXAMPLE: One action I will take is a less-is-more approach when designing my programs. I will seek to cut 50% of my program elements. These are great actions to take if you’re someone who over-delivers. Yours may be entirely different.)

Good, now that you have written the actions you’ll take that support you in charging what you’re worth, we have something else to explore and discover. That is the topic of boundaries. In your Empowered Pricing Paradigm, there may be some things or even someone who needs to be let go of. The question is, “Who or what do I let go of?” Let’s find out on the count of three. One, two, three. STEP.

“Who or what do I let go of?” You need to be ruthlessly honest with yourself. Don’t start censoring and saying, “I can’t,” or worrying about someone else’s feelings. Let go of that.

This is all about YOUR Empowered Pricing Paradigm, so be honest, truthful and in integrity within yourself. It’s not about what someone else might think or feel. Go ahead and write down who or what you need to let go of.

Good! We have two more areas to explore so take a breath, let it out…and let’s see what else will empower your pricing.

The next step is about environment. Your environment includes your physical environment which means your home, your office, even your closets. You don’t need to have expensive things or a fancy home but what you DO need is an environment that reflects you charging what you’re worth. So let’s find out what needs to shift in your environment.

The sentence starter is, “My environment reflects my fees by ____.” Let’s find out on the count of three. One, two, three. STEP.

(IF YOU WANT TO GIVE AN EXAMPLE: My environment reflects my fees by being free of clutter, by having something beautiful that I look at and by having flowers on my desk.)

How does your environment reflect your fees? Maybe you have privacy, or your own desk that you don’t have to share with anyone else in your family. Write down everything you can think of in your environment that from this paradigm of empowering your pricing reflects your new fees.

Okay…the last piece is marketing. The sentence starter is, “The steps I take with my marketing materials to validate my fees are ____.” Let’s find out on the count of three. One, two, three. STEP.
“The steps I take with my marketing materials to validate my fees are ____.” Maybe it’s asking for testimonials or asking someone to endorse your work. Maybe it’s putting the logos of radio or TV programs or awards you have won, up on your website or on your marketing materials. Maybe it’s having a new photograph of you taken that represents you now that you’re beginning to charge what you’re worth. Write down every idea you have.

Now it’s time to take one final step into the YOU that you had imagined back at the beginning of this process...because now you have arrived. Take one final step on the count of three. One, two, three. STEP. Step into that spot of this new, amazing and empowered you and enjoy the feeling of having arrived in your Empowered Pricing Paradigm.

Now go ahead and turn around. Look at your marketing that validates your fees...the environment that reflects your fees...at the boundaries and letting go that supported you...and the actions that also support you. Look at the things you are now free to do, be and have, fully valuing how much you charge, believing with every fiber in your being and every beat of your heart that you’re worth it because of your connection to Spirit. How cool is that?!
Standing In The Truth Of Your Value

In what way does your program, product, or service impact your client in each of these key areas?

- FINANCES/MONEY
- HEALTH/WELL BEING
- FAMILY/RELATIONSHIPS
- BUSINESS/CAREER
- FUTURE/PURPOSE
Standing In The Truth Of Your Value

Here’s an exercise to help you discover ALL of the ways your clients’ lives are impacted by your work together.

1. Begin by listing a few of the primary RESULTS your clients get from working with you. List these in the left column.

2. Next, answer the question: *In what way do these results impact my clients’ finances or money?* Write your answers in the Finances/Money section.

3. Next, answer this question: *In what way do these results impact their health and well-being?* Write the answers in the Health/Well Being section.

4. Now, answer this question: *In what way do these results impact my clients’ family or relationships?* Write your answers in the Family/Relationships section.

5. Now, answer this question: *In what way do these results impact their business or career?* Write the answers in the Business/Career section.

6. Finally, answer this question: *In what way do these results impact their future or purpose?* Write your answers in the Future/Purpose section.

It’s pretty amazing to see just how deeply your clients’ lives are impacted by your work, isn’t it?!
Standing In The Power Of Solving The Problem

Now that you’ve discovered all of the positive ways your clients benefit from your programs, products, or services it’s time to uncover what the COST is to them in NOT hiring you.
Standing In The Power Of Solving The Problem

In this exercise, you’re brainstorming the negative impact – or cost – to your client of not getting the help they need.

1. Begin by brainstorming several of the most obvious results they stand to lose by not solving their problem. List these in the left column. Be specific.

2. Next, brainstorm what, by not achieving those results, the cost is for your clients in terms of their finances or money.

3. Next, brainstorm what, by not achieving those results, the cost is regarding their health and well-being.

4. Now, brainstorm what, by not achieving those results, the cost is to your clients regarding their family and relationships.

5. Now, brainstorm what, by not achieving those results, the cost is regarding their business or career.

6. Finally, brainstorm what, by not achieving those results, the cost is regarding their future and their purpose.

Is this helping you see how VALUABLE and IMPACTFUL what you do is for your clients?!
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Is The Juice Worth The Squeeze
(How Much Is Your Time Worth?)

Amount of money you want to pay yourself in 1 year:

$\quad$

\[
\frac{\text{Amount of money you want to pay yourself in 1 year}}{\text{Number of hours you want to work in 1 year}}
\]

Number of hours you want to work in 1 year:

#

(number of hours per week * 50 weeks per year)

Amount your time is worth per hour:

$
\quad$

While you are not charging by the hour, always use the amount your time is worth to calculate the cost of your time invested in marketing and delivering each offer.

Now that I know what my time is worth, one project I can let go of is

so that instead, I can focus on my offer of

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Cost Planning Worksheet

**Marketing Costs**
(Your time, copywriting, technical set up, web pages, graphic design, etc.)

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**Delivery Costs**

**FIXED** (Planning time, coaching, administrative time, web pages, bridge line, transcription, etc.)

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**VARIABLE** (Coordination time, coaching, printing, event expenses, materials, etc.)

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Easy Pricing Guide

Step 1: What is your Full Pay Investment?

Step 2: What is your Quick Decision Savings?
- Make it enough to inspire action!
- This will vary depending on your package. For a high-end program, it can be $300-$3000.

Step 3: Calculate your “reality check” amount
Full Pay Investment – Quick Decision Savings = Quick Decision Investment
- This is the lowest amount you will receive – is it acceptable to you?

Step 4: What is the additional amount for a Payment Plan?
- This is often an additional 15-25% added to the Full Pay Investment as a “courtesy cost” because you are waiting to be paid in full.

Step 5: What is your Payment Plan Deposit and Payment Schedule
- Decide on the Deposit (typically between 30-50% of the total).
- Calculate the remaining Balance.
- Decide on the Number of Payments.
- Calculate the Monthly Payment Amount.
  \(\text{Balance} / \text{Number of Payments} = \text{Monthly Payment Amount}\)
- You can apply a Quick Decision Savings to the Payment Option
  \(\text{(just remember to apply the savings to the balance, not to the deposit)}\).

Step 6: Review your Final Pricing
- Full Pay Investment
- Full Pay with Quick Decision Savings
- Payment Plan Investment
- Payment Plan with Quick Decision Savings
Easy Pricing Template

Step 1: What is your Full Pay Investment?
$ _____________

Step 2: What is your Quick Decision Savings?
(Make it enough to inspire action!)
$ _____________

Step 3: Calculate your “reality check” amount
(Full Pay Investment – Quick Decision Savings = Quick Decision Investment)
$ _____________ - $ _____________ = $ _____________

Step 4: What is the additional amount for a Payment Plan?
(This is often an additional 15-25% added to the Full Pay Investment as a “courtesy cost” because you are waiting to be paid in full.)
$ _____________

Step 5: What is your Payment Plan Deposit and Payment Schedule
(Typically, the deposit is between 30-50% of the total.)
Total: $ _____________ Deposit: $ _____________ Balance: $ _____________
Balance: $ ______ / No. of Payments: ______ = Monthly Payment: $ ______

Step 6: Review your Final Pricing
Full Pay Investment  Full Pay with Quick Decision Savings
$ _____________  $ _____________

Payment Plan Investment  Payment Plan with Quick Decision Savings
Total: $ _____________  Total: $ _____________
Deposit: $ _____________  Deposit: $ _____________
Balance: $ _____________  Balance: $ _____________
No. of Pmts: # _____________  No. of Pmts: # _____________
Monthly Pmt: $ _____________  Monthly Pmt: $ _____________
Easy Pricing Example

Step 1: What is your Full Pay Investment?
$ 2,497

Step 2: What is your Quick Decision Savings?
(Make it enough to inspire action!)
$500

Step 3: Calculate your “reality check” amount
(Full Pay Investment – Quick Decision Savings = Quick Decision Investment)
$ 2,497 - $ 500 = $ 1,997

Step 4: What is the additional amount for a Payment Plan?
(This is often an additional 15-25% added to the Full Pay Investment as a “courtesy cost” because you are waiting to be paid in full.)
$ 400

Step 5: What is your Payment Plan Deposit and Payment Schedule
(Typically, the deposit is between 30-50% of the total.)
Total: $ 2,897 Deposit: $ 1,000 Balance: $ 1,897
Balance: $ ______ / No. of Payments: ______ = Monthly Payment: $ ______

Step 6: Review your Final Pricing

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<tr>
<td><strong>Payment Plan Investment</strong></td>
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<td>Deposit:</td>
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<td>Balance:</td>
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Pricing Do's & Don'ts

DON'T… Use words like “price, cost, buy or discount.”

DO... Always say “invest or investment”.

DON’T… Discuss the investment until you’re sure they are a fit.

DO... Get clear about the type of person you want in your program and definitely listen to your intuition about who is (and who is not) a fit.

DON’T... Allow a client to renegotiate their deposit. How you handle payment sets the tone for your credibility throughout the program.

DO... Always make the deposit non-refundable. This is their commitment to their transformation.

DON’T... Undercharge, as it devalues your credibility and reputation. People respect what they pay more for.

DO... Remember that your clients aren’t investing in you, they are investing in themselves through you.

DON’T... Base your pricing on time. Clients are investing in results, attention and accountability to move forward.

DO... Have your client sign a simple agreement

DON’T... Decide what someone can or cannot afford. You have no idea how powerfully someone can step up when it’s for something they really want.
DO... Adopt the mindset of holding your clients as powerful, no matter what, even if they want to drop out of a program or delay their payments (you’ll be surprised how often this mindset will help you coach your client to make a new, empowered decision).

DON’T... always post your fees on your website

DO... Consider offering a payment plan as one of your payment options

DO... Remember that a payment plan is a courtesy you’re offering your clients. They are investing in a program (not paying “month to month”).

DO... Accept all 4 major credit cards.

DO... Let your merchant provider know when big changes are coming. Keeping them informed will help you avoid situations of going over monthly limits.

DO... Consider not accepting credit cards for higher package investments

DO... Always put a time limit on when the package must be completed

And one final DO... Expect your clients to get into action QUICKLY once they invest in your program. It’s often just the kick-in-the-pants they need and now they are super motivated!
Anchoring Your Pricing

_You are the first person you have to convince, not your prospective client._

### Double It Exercise

1. Take the price you've just set (full-pay), double it and write that number down.

2. Now ask yourself, **“What would have to be true to charge this amount?”**

### Mirror Test

- Stand in front of a mirror and say out loud to yourself, **“For this package or program, my fee is ____.”**

- Notice your reaction to it. Do you get a little bit excited or scared? If you happen to feel a little nervous or a little bit of trepidation about being able to get that number, this is not permission to back down. Go back to that question of, **“What would have to be true for me to charge this amount?”**
Stepping Into New Pricing Exercise
(Intuitive Coaching Toolkit™)

OTHER
• As your ideal client, in what way does investing this amount inspire or challenge you?
• What do you believe about the person you're hiring who charges this amount?
• What do you need to know to feel confident about investing in yourself?

OBSERVER
• As a fly on the wall, looking over at SELF, what do you see that that person over there needs to do or tell themselves in order to feel confident about their fee?
• Now, looking over at OTHER - their ideal client, what are you observing that the client needs to know in order to say yes to this offer?

SPIRIT
• How does charging this amount connect you more deeply to spirit?
• What else does spirit want you to know about charging this amount?

SELF
• How do you now feel about your fee?
• Based on all that you've heard, what is now clear for you?
• What is the most important piece you want to take forward with you as you begin to make your offers with your new fee?
Attract More Clients With A Compelling Guarantee

Giving a guarantee has one purpose: to give your clients peace of mind, making it easy for them to say, “Yes” to your offer.

Most service professionals don’t give a guarantee because they’re concerned clients will take advantage of their generosity. Trust me, it’s rare that clients will do so. And, the number of people you sign on as clients BECAUSE you have a guarantee will far exceed the few who ask you to honor your guarantee.

Great guarantees sound bold, strong, and almost like a challenge. Make it one you can live up to; one that inspires you to always deliver top-notch service. The energy of your guarantee is one of confidence, not fear or limitation.

There Are Three Types Of Guarantees

1. **Performance guarantee**  
   (“I promise you’ll learn how to ______”)

2. **Results guarantee**  
   (“I promise if you ______ then ______”)

3. **Value guarantee**  
   (“If you don’t believe this course is worth every penny you spent I’ll ___”)

A Coaching Challenge For Your Guarantee

- ✓ If you are reluctant to give a guarantee, where are you reluctant to be bold?
- ✓ The energy of your guarantee should be confident and expansive; not fearful.
Example Guarantee For a WORKSHOP:

**My Personal "Your happiness is important to me" Guarantee**

Reserve your ticket now and if for any reason you can’t attend you have until 30 days before the workshop begins to personally ask for a refund. We’ll refund your ticket purchase, less a modest $50 bookkeeping fee. Or, since your ticket is transferable, you may have a friend or colleague attend in your place.

PLUS, at the workshop, take in every moment of content. Network like crazy. Take tons of notes. Get the breakthroughs you came for. And if for some reason you are not delighted and you feel we’re not delivering on what is promised on this website, simply turn in all your materials before the end of the first day, let us know why, exit the event and I will refund 100% of your workshop ticket investment within 30 days.

Example Guarantee For a PRODUCT:

**My Personal "Your Happiness is Guaranteed" Pledge**

I want you to be MORE than satisfied with this product. If for some reason you aren't then I want to make sure you end up happy. If this course doesn't meet your expectations, just let me know within 30 days of your purchase and I will give you a 100% refund out of my own pocket.

Example Guarantee For a TELESEMINAR:

**My Personal "Make You MORE Than Happy" Guarantee!**

I want you to be MORE than satisfied with the information delivered in this course.

So if by the START of the Second Call of this telecourse you’re not 100% delighted with the information provided – just let me know and I’ll arrange to refund your money back, and I’ll remove you from the program. You have my word on it!
Create A Guarantee

1. Get Clear About What You Can Confidently Stand Behind with Your Program, Product or Service.

List out everything you can stand behind with this program, product or service. I recommend filling this out two, three, four or five times.

Complete the following sentence:

“I stand behind my program, product or service and its ability to:

_________________________________________________________________________.”

“I stand behind my program, product or service and its ability to:

_________________________________________________________________________.”

“I stand behind my program, product or service and its ability to:

_________________________________________________________________________.”

“I stand behind my program, product or service and its ability to:

_________________________________________________________________________.”

2. Choose the TYPE of Guarantee You Want to Create.

   o Performance
   o Results
   o Value

3. Write your guarantee in the space below.
16 Ways of Creating Social Proof to Validate Your Fees

1. Interview your client and record it or take notes
2. Email testimonial questions, then edit the answers
3. Video interview client
4. Transcribe video testimonial and use both video and written text
5. Use before & after photos if your service is more visual
6. Take photos of you working with your clients
7. Use your clients' full names
8. Collect statistical information about results your clients experience
9. Take photos of you with colleagues or celebrities in your industry
10. Step up to the microphone at events
11. Offer to be a spotlight or panel participant at events where appropriate
12. Post a calendar of your events & appearances in your ezine
13. Offer a testimonial for someone else to use on their website
14. Post tips, quotes and content on social media
15. Create client case studies
16. Apply for and win awards

8 Ways To Use Social Proof to Validate Your Fees

1. List testimonials on webpage
2. Sprinkle testimonials throughout a webinar
3. Include testimonials in a teleseminar
4. Include case studies in your Power Point presentations
5. Include a testimonial or case study in your ezine
6. Post photos of you with clients or industry celebrities on social media
7. Add testimonials to your sales pages and on sign-up forms
8. Include testimonials in a brochure & other printed materials

Include social proof anywhere else you can think of!
Sample Testimonial Questions

✓ What was the reason you decided to do this?

✓ What was your experience?

✓ How will this impact your business and your life?

✓ What was the biggest challenge for you in your business before joining PROGRAM NAME?

✓ How has the coaching you've received helped you get focused and on track?

✓ What have you implemented so far?

✓ What have been the results so far since being in PROGRAM NAME? (if you can be specific in terms of results, such as income made, time saved, increased sales)

✓ If you were talking to someone who was interested in joining PROGRAM NAME what ONE thing would you most want them to know?
Debuting Your New Pricing

Debuting your fees is about putting your fees out into the world.

✓ Practice saying your fees so often it becomes as comfortable as saying, “pass the salt.”

✓ Tell people, “I specialize in…” when talking about your services. People are accustomed to giving more respect to specialists. You’ll automatically have more authority when you describe yourself as a specialist. And, people will always pay a premium to work with a specialist.

✓ Words to avoid when discussing fees: Price, Buy, Cost, Spend, Purchase, Fee

✓ Words to use: Invest, Tuition

✓ Just because a client asks for a discount does NOT mean you have to say, “yes.” You can say, “no” or suggest a payment plan.

✓ If someone asks, “How much do you charge?” early in a conversation or when they first meet you, do not give your fee!

You can say “I’d love to share what the investment is. I would need to get some information first. Let me find out more about what your situation is like so I can make sure to talk to you about the right service or package that’s going to be the best fit for you.”

If they insist, saying, “Give me a ball-park,” still don’t give your fees. Instead, keep your tone positive and firm while saying, “I can’t give you a ballpark because it wouldn’t be accurate. Let me ask a few questions first and then I’ll be happy to share with the investment is based on how it makes sense for us to work together.”

✓ When do you talk about your fees?

This is crucial! Wait until AFTER you’ve asked the Million Dollar Question to quote your fee. At that point, when they’ve said “it’s priceless” or “this is worth everything” then whatever price you give isn’t going to seem very significant compared to the value they receive.

And remember, once you quote your fee, stop talking!
Avoid quoting your fees on your website, unless it is for a program your client can sign up for directly online.

Focus on being a great value, not on being a bargain.

"The Million-Dollar Question"

The Million Dollar Question will minimize or even eliminate resistance to your fees because it authentically connects the client to the VALUE of the results they want from investing in your program or service. Here are 3 versions of what it sounds like:

“*If we decide to work together and we achieve everything we’ve outlined here, what would that be worth to you?*”

“*Imagine if we decide to work together and we achieve everything we’ve outlined here, what would that be worth to you?*”

“*Hypothetically, if we decide to work together and we achieve everything we’ve outlined here, what would that be worth to you?*”

Ask the Million Dollar Question BEFORE talking about your packages or your fees.

Tip: Once you ask the question, stop talking! Be silent and wait for your potential client to formulate his or her answer to your Million Dollar Question. There is a lot of power in silence.

Usually, the answer you’ll hear will be something like this: “It would be priceless” or “It would be worth everything”. These are the types of answers you’ll hear if you’ve done a good job of uncovering their situation and the results they want from hiring you.

If you don’t hear an answer that is along the lines of “priceless” do not continue with discussing fees. Why not? Because if they aren’t seeing the value of what you’re offering, you’ll experience price resistance.

**What if the Million Dollar Question feels uncomfortable to ask?**

Asking the Million Dollar Question is opening an opportunity for the client to step into the *vision* of what they really want. Asking this question is like offering them a gift.
BONUS

Courageous Coaching®
METHOD
The Courageous Coaching® Mindset

Your love has to be greater than your fear.

You have to love your client enough to feel what needs to be felt, see what needs to be seen and say what needs to be said.

Your love has to be greater than your need to be liked.

Practice passionate detachment.

Hold someone as powerful, no matter what, even when they can’t do so for themselves.
Coaching Call Template

1. Ask what’s working or what they want to celebrate.
   By setting a standard for achievement, no matter at times how small, you empower your client to acknowledge their progress.

2. Ask what the breakthrough or powerful outcome is they want to create from this call.
   Modeling for your clients that you expect them to show up prepared and to think in terms of leaping forward helps them make faster progress.

3. Coach them on the breakthrough or outcome they brought to the call.
   Focus on what will move them forward (which may mean coaching on what is keeping them stuck)

4. Coach your client on new information/content.
   Adding new information/content establishes you as an expert and creates value in the eyes of your client.

5. Make between 1-4 requests, asking them to confirm with you what they’ve written down.
   Make certain each request is specific, measurable and has a “by when” date.

6. Complete the call by asking what was most valuable, did they get what they wanted or what is the breakthrough they got.
   Installing value helps with client retention and supports your client in feeling empowered to make their next big leap forward!

You can use this template in any length of call, from 5 minutes to 1 hour.
Spirit
gives us a sense of purpose and passion

Are they clear as to WHY they are doing what they’re doing?

“Why is this important to you?”

Mindset/Identity
Identity is who we think of ourselves as

Who are they thinking of themselves as?

“As the (their identity statement here), how do you handle this situation/choice?”

“As someone who is ____________, what do you ______________?”

Beliefs
Beliefs confirm/support our sense of identity

Do they doubt that what they want to achieve/do is possible?

“What would the (their identity statement here) believe to make this possible?”

“What would you have to believe to make this possible?”

“What if __________ were no longer important to you?”

Decision
Decisions are based on what we believe is possible

What filter or information are they using to make a decision?

“What information are you using to make this decision?”

“What are you prioritizing (what are your options)?”

Clear Outcome
Clear outcomes determine the results we create

Are they clear and precise as to EXACTLY what they want?

“What is the outcome/breakthrough you want to create?”

Action
Actions are chosen based on the outcome we want to create

Do they know exactly what needs to be done first, second, etc., even if they don’t know how to do it themselves?

“What’s the first/next step?”

Support Systems/Environment
Systems and environment determine our success

Do their team, environment and schedule support their success?

“As the (their identity statement here) what do you need to ask for/let go of to make this successful?”
Breakthrough Coaching Questions

With the right questions you can create amazing, powerful transformation in a surprisingly SHORT period of time. Here are the Courageous Coaching® Questions you can use with any client, in any situation to create breakthrough results.

What if __________ were no longer important to you?

Tell me more…

Are you ready to change this?

Are you ready for this to be different?

What’s the breakthrough you want to create around this?

What’s the decision you would like to make?

What’s in conflict or not in alignment?

How do you know?

What let’s you know that?

What if you could?

As the (their identity statement here) how would you handle this?

What if you were to __________________________?

What would it take for you __________________________?

What would have to happen for you to __________________________?

There is no way you can convince me that you can’t ___________________.
(State something specific you know they CAN do.)
Creating An Awesome Outcome

Coaching your client to create a clear, awesome outcome practically guarantees a positive result!

**Does your client have an outcome that is:**

1. Stated in the *positive*?

2. Started by them and in their *control*?

3. Chunked down small enough so they can *achieve* it?

**Example of a common, unclear outcome:**

“I want to make more money this year.”

**Example of a clear outcome:**

“I want to increase my income 50% in the next 6 months.”
How To Keep Your Energy Clear

Are you, as the coach, feeling confused, in doubt or overwhelmed?

*You may be picking up energy from your client.*

Are you sticking to a prescribed agenda instead of being flexible with your client?

*Not every session follows the program. Be flexible, AND, be aware that if your client has more than two sessions in a row that don’t include a breakthrough or new content/information this is a signal that something needs to be addressed.*

Are you holding back from telling your client what you’re sensing because you don’t want to be too __________.

*This is an opportunity for you to trust your inner guidance and claim your role as leader. When you hold yourself as powerful you influence your client to do the same. Trust your intuition AND always check it out with the client!*

Do your sessions often run over time?

*Stop thinking you have to give more in order for people to be satisfied. Focus on moving your client forward by one step each session, then complete the call. In the future, design your programs so your session times are cut in half.*
How To Coach A Client Who Is Stuck Or Not Making Progress

1. Is your client giving up too soon?

2. Is your client sticking with something they need to let go of?

3. Are they undervaluing their abilities?

4. Are they afraid to express their REAL desire?

5. Have you “tried on” what they are telling you?

6. Are you “assuming you don’t know” so you can stay curious?
Coaching Doubt or Confusion

Doubt or confusion is created by:

- **Unclear outcomes**
  Check first to see if your client is clear about what they want.

- **Competing priorities (often includes trying to please others)**
  Ask, “What are you prioritizing most in making this decision?” to understand their priorities.

- **Competing values or values that conflict**
  Ask, “What is most important to you about making this decision?” to understand their values.

- **Not enough information or criteria available to decide**
  Ask, “What information are you using to make this decision?” If less than 3 pieces of criteria then it’s not enough to choose, or to choose wisely.

- **Too much information or criteria that often includes pleasing others**
  Ask, “What information are you using to make this decision?”

- **Doesn’t believe the outcome is possible...for them**
  Ask, “Have you ever __________ before?” (Listen for how you can help them see that if they’ve done something similar before, they can do this!). Ask, “On a scale of 1-10, 10 being totally convinced, how much do you believe this is possible for you?”

- **Hearing “internal” critic or advisor that isn’t supportive**
  Ask, “Are you hearing an internal voice telling you that in some way, you can’t?” or "Are you telling yourself you can't?" or, "Is there some voice inside of you that says you can't?"
Getting Your Clients Into Action

**Tip #1:** Focus on getting your client into action within 24-48 hours

**Tip #2:** Ask your client to give the action step time frame *first*

**Tip #3:** Coach your client into a shorter time frame

**Tip #4:** Keep looking for ways to help chunk down action steps so that your client feels they can go forward quickly.

**Tip #5:** You don’t need to go through all levels of the Courageous Coaching® Method before asking your client what action step they want to take.
Secrets On Shortening Your Coaching Sessions & Ending On Time

Tell clients in advance how long sessions are

Set a timer to go off 5 minutes before end of session

Say, "We have 5 more minutes...(then ask a wrap-up question such as, "What is the #1 action you could take?")"

If a client brings up something towards the end of the call that feels big, ask, "We have 5 minutes left today, is this something you would like to jump into or save for our next coaching call?"

An alternative is to say, "We have 5 minutes left today, let's see what we can do to get started on this today, okay?"

Don't bring up a big topic towards the end of the call and expect to coach on it. Instead, say, "One of the things it sounds like we need/can coach on is ___________. I'm going to write that down on our coaching focus list."

Be willing to interrupt your client

Don't agree to take on assignments for after the call, such as sending links, researching, sending documents, providing resources, etc. Instead, take care of it while you're in the coaching session. Your clients are the ones getting accountability assignments - not you!

If there is a document you often want your clients to have, have the link handy so you can send it within seconds while still on the call. If there are multiple documents consider creating a password protected page on your site just for clients.

On those days where you decide to go over time, let your client know you have extra time today. They will be very appreciative and will value your time!
My Authentic Strengths As A Coach

My Core Coaching Values Are:

Which Means I Give Myself Permission To:

What I Believe Is Possible For My Clients:

What I Will Not Tolerate In My Clients:

I Will Hold My Clients As Powerful, No Matter What, Even In Moments Where They Can't Do So For Themselves!
BONUS
Coaching Business Best Practices Kit
Coaching Business Best Practices

- **Best ways to set up your coaching calendar** so you’re working just a few days each month (sample schedules included)

- How long to make your coaching sessions so you’re freeing your time and not over-delivering PLUS the **secret to shortening your coaching sessions** (*Courageous Coaching®*)

- A powerful **6-step template for delivering value in each coaching session** without feeling burn-out (*Courageous Coaching®* step by step template included)

- **Client forms to use to keep your clients** on track and your business easily organized (Getting Started Client Form, Coaching Call Preparation Form, Coaching Session Notes Form, Self Review Form)

- **What to do** if clients cancel, show up late or unprepared

- **Payment tools** to help you grow your business

- Strategies on **what to do and say** if a client runs into payment issues

- How to have a **courageous conversation** with a client

- How to create clear boundaries so you gain your clients' respect and avoid issues down the road

- **Powerful ways to keep your clients accountable** and deeply connected to the value of your coaching together
Best Ways To Set Up Your Coaching Calendar

My Monthly Calendar, At A Glance

<table>
<thead>
<tr>
<th></th>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WEEK 1</strong></td>
<td>Team Meetings</td>
<td>Ezine Broadcast</td>
<td>Profit Projects</td>
<td>Stars Training and Q&amp;A Calls</td>
<td>Weekly Wrap-up</td>
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<td></td>
<td></td>
<td>Diamond Coaching</td>
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<td>Certification</td>
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<td></td>
<td></td>
<td>Training Call</td>
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<tr>
<td><strong>WEEK 2</strong></td>
<td>Team Meetings</td>
<td>Ezine Broadcast</td>
<td>Profit Projects</td>
<td>Preview Webinars or Teleseminars</td>
<td>Weekly Wrap-up</td>
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<td></td>
<td></td>
<td>Certification</td>
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<td></td>
<td></td>
<td>Training Call</td>
<td></td>
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</tr>
<tr>
<td><strong>WEEK 3</strong></td>
<td>Team Meetings</td>
<td>Ezine Broadcast</td>
<td>Profit Projects</td>
<td>Stars Training and Q&amp;A Calls</td>
<td>Stars Action Day</td>
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<tr>
<td></td>
<td></td>
<td>Diamond Coaching</td>
<td></td>
<td>Mastery Training Call</td>
<td>Weekly Wrap-up</td>
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<td>Certification</td>
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<td></td>
<td></td>
<td>Training Call</td>
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</tr>
<tr>
<td><strong>WEEK 4</strong></td>
<td>Team Meetings</td>
<td>Ezine Broadcast</td>
<td>Profit Projects</td>
<td></td>
<td>Weekly Wrap-up</td>
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<td>Certification</td>
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<td></td>
<td></td>
<td>Training Call</td>
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</tbody>
</table>

Scheduling Tips:

- Batch your coaching times into specific weeks and days of the month
- Schedule time off at the start of the year
# Best Ways To Set Up Your Coaching Calendar

## My Weekly Calendar, At A Glance

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00-8:00 Team Meeting</td>
<td>8:00-10:00 Horses</td>
<td>7:00-8:00 Team Meeting</td>
<td>8:00-10:00 Horses</td>
<td>7:00-8:00 Weekly Wrap-up</td>
</tr>
<tr>
<td>8:00-10:00 Horses</td>
<td>10:30-12:00 Diamond Coaching</td>
<td>8:00-10:00 Horses</td>
<td>10-11:30 (varies) Stars Training and Q&amp;A Calls</td>
<td>8:00-10:00 Horses</td>
</tr>
<tr>
<td>10:00-12:00 Ezine Writing</td>
<td>12:00-1:30 Certification Training Call</td>
<td>10:00-3:30 Profit Projects</td>
<td>1:00-2:30 Mastery Training Call</td>
<td>10:00-11:00 Email</td>
</tr>
<tr>
<td>1:00-4:00 Pilates, Personal Coaching</td>
<td>1:30-2:00 Email</td>
<td>3:30-5:00 Riding Lesson</td>
<td>2:30-5:00 Profit Projects</td>
<td>11:00-12:00 Profit Projects</td>
</tr>
<tr>
<td>4:30-5:00 Email</td>
<td>2:00-5:00 Profit Projects</td>
<td>5:00-6:00 Email</td>
<td>5:00-5:30 Email</td>
<td>1:00-3:00 Pilates</td>
</tr>
<tr>
<td>5:00-6:00 Body Work</td>
<td></td>
<td></td>
<td></td>
<td>4:30 Body Work</td>
</tr>
</tbody>
</table>

## Scheduling Tips:

- ✓ Resist the urge to schedule long breaks between calls
- ✓ Batch, batch, batch
- ✓ Schedule in self-care and exercise
Getting Started Client Form

Today’s Date:

Client Name:

Client Email:
Client Phone:

1. What was your income for the last 12 months? For the last 90 days?

2. What is your 12 month bold money goal?

3. What are the three challenges you would like to overcome to achieve a quantum leap in your business?

4. What are your offers and what do you charge for each? (List your packages, programs, home study courses, workshops)

5. Current List Size:

6. What are you using to manage your list? (Example: InfusionSoft, 1ShoppingCart, Aweber, Constant Contact, Mail Chimp, Ontraport, etc.)

7. Tell us in as much detail as possible, who is your ideal client?
Getting Started Client Form (Cont'd)

8. How many hours per day/week are you working in your business?

9. What do you currently do to market your business?

10. How much time do you spend each day marketing your business?

11. What is your most marketable skill, knowledge or expertise?

12. Is there anything else you would like me to know about your business?

Two moving forward items we will coach on during your coaching session.

• Your number 1 opportunity for the next 60-days is:

• Your top 3 priorities for the next 60-days are:
  1.
  2.
  3.
Sample Coaching Call Preparation Form

#1. How am I right now? How have I been since my last coaching call?

#2. What I am celebrating since my last coaching call is:

#3. The actions I've taken since my last coaching call are:

#4. What I am most grateful for/proud of this past week is:

#5. The challenge(s) I am facing now is:

#6. The opportunities available to me right now are:

#7. The outcome or breakthrough I want from this coaching call is:

#8. Any other thoughts or comments you'd like me to know about before this call?

Coaching call wrap up -- My action steps are (and by when):
Coaching Session Notes Sheet

Today's Date:
Client Name:

Desired Outcome:

Notes:

<table>
<thead>
<tr>
<th>Action Step</th>
<th>By When</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>
Coaching Session Self-Review Form

What worked well for you?

What worked well for your client?

What felt most powerful for you?

What was a breakthrough for you as the coach?

What was a breakthrough for your client?
What to do if clients cancel, show up late or unprepared

✓ Have a clear cancellation policy (Do they lose the session if cancelled with less than 24 hour notice? Do you reschedule regardless of how short of notice?)

✓ Let your client know in advance what your cancellation policy is

✓ Let your client know there may be times where you have to reschedule an appointment

✓ Send a coaching call reminder the beginning of the week of their appointment

✓ Confirm your next appointment at the end of the coaching session

✓ If a client shows up late this is something to coach on because if it's happening in your calls, it's happening in other aspects of their life or business. What is key is coaching on it from a place of curiosity without feeling "parental." You can start by saying, "I notice you often call in for our coaching together 5 minutes late and I'm curious about that." Listen and coach on what they say. Remember this is not about you!

✓ If a client is late that doesn't mean you are obligated to go over time - that is your choice (be mindful of creating co-dependency where they're late and you go over time believing you need to make up for it)

✓ If a client is a no-show, call them or email them within 6-7 minutes asking if they are okay

✓ If a client cancels more than once in a blue moon it is something to coach on.

✓ If a client comes unprepared reconnect them to what is important to be focused on (resources are your last call notes, the getting started form, your intuition and insight about where they can be headed). Remember that the coach is greatly supporting a client by holding their agenda as a priority for them, as often the client has competing demands on their time and attention.
Payment Tools To Help You Grow Your Business

✔ Merchant Account to accept Credit Card Payments (DirectPay - KendallMerchant.com)

✔ Shopping Cart & Contact Management System (Infusionsoft - KendallCartInfusionsoft.com)

✔ Declines Policy & System

✔ Accounts Receivable Policy & System

Tips on what it's best not to do:

▪ Use PayPal as your main source of accepting payment

▪ Accept checks for monthly payments

▪ Accept checks outside of your country

▪ Invoice and waiting for payment
Strategies On What To Do & Say For Client Payment Issues

✔ Create your policy ahead of time, type it up and have it handy as your reference

✔ Address the issue early

✔ Hold the client as powerful, no matter what

✔ Be clear as to your policy about when services stop without payment being made

✔ Remind them of their agreement

✔ Work out a payment plan that works for you both

✔ Know when to let someone go

What do you say if a client wants to cancel out of their program with you or tells you they can’t pay?

"I wouldn’t be the ("Platinum" or “Leadership”) coach you expect me to be if I simply said, “okay” to your quitting the program. So what is really going on for you?"

Listen to their concerns, then coach them as to how this is a pattern for them and that this is the moment to create a breakthrough. Create an action plan for them to remain in the program. If needed, remind them participation is up to them but payment in full is still expected.
How To Have A Courageous Conversation With A Client

1. BREATHE, shake out any tension in your body and say out loud
   "I stay CONNECTED to my highest and greatest GOOD and
   I stay connected to SPIRIT"

2. Position yourself as the LEADER of the conversation

3. Seek UNDERSTANDING first, then to be understood

4. MIRROR what the other person is saying

5. SUMMARIZE what you are hearing

6. Explain the OPTIONS

7. Get AGREEMENT and finalize action step(s)
How To Create Clear Boundaries So You Gain Your Clients' Respect And Avoid Issues Down The Road

"An ounce of preframing is worth a pound of reframing."

1. Set up specific days of the week when you're available to answer email or take calls. Example: Tuesday - Thursday

2. Decide your turn-around time for answering questions, emails or taking calls. Example: Within 24 hours, or 48 hours

3. Choose how you best love to be communicated with, what that communication should look like. Example: Best by email and keep it brief.

4. Decide how much in advance you want to receive the coaching call prep sheet and what you'll do if you don't receive it.

Bonus Tips:

➤ Always start your client relationship by walking them through the rules of engaging with you.

➤ Be consistent.

➤ Ask for what you need - if a client emails "a book" to you, respond by asking them to summarize it for you.

➤ Have faith that people always get what they need.

➤ Remember your Courageous Coaching® mindsets!

✓ Your love has to be greater than your fear.
✓ You have to love your client enough to feel what needs to be felt and say what needs to be said.
✓ Your love has to be greater than your need to be liked.
✓ Practice passionate detachment.
   Hold someone as powerful, no matter what, even when they can't do so for themselves.
Powerful Ways To Keep Your Clients Accountable And Deeply Connected To The Value Of Your Coaching Together

⚠️ Your goal is to anchor a sense of value for your client in themselves.

⚠️ In each call ask, "What was the most valuable for you today?"

⚠️ Always end a session with an action step and a by-when date.

⚠️ Always begin a session by checking in with what they said they would accomplish.

⚠️ Don't accept excuses. Question limiting assumptions. Use your Courageous Coaching® Breakthrough Coaching Questions.

⚠️ The priority in your coaching isn’t always what was accomplished but how your client is responding to pressures/stressors/fear/procrastination/other peoples' priorities in their life so they see they always have a choice.

⚠️ Every 60-days (or so) check in by asking:

  - "What have you completed?"
  - "What are the top 3 successes you feel the best about?"
  - "What are 3 acknowledgements you can make about yourself?"
  - "What are 5 things you feel the most gratitude for right now?"
  - "What is 1 area you want to be sure we address as we go forward?"
  - "60 Days from now, what do you want to be celebrating having completed? How do you want to feel?"

⚠️ Every 60 days (or so) take a fresh look at the priorities of your coaching together so both you and your client are on the same page, feeling aligned and feeling powerful together as a team!

⚠️ People hire a coach to help them do what they wouldn't do on their own!
Are You Ready For The Next Phase of Your Certified Money, Marketing and Soul® Coach Training Program?
What Does It Take To Get Certified?

1. Attend 4-day live training in-person or watch the video livestream by Sunday, July 3rd.

2. Deliver practice session from live/livestream training by Sunday, July 3rd.


5. Attend all live calls or furnish proof that you have listened to the call recording.

6. Deliver 6 buddy coaching sessions, document the calls with the Coach’s Session Review form and submit calls on Coaching Session Call Log.

7. Receive 6 buddy coaching sessions, document the calls with the Client’s Coaching Session Review form and submit calls on Coaching Session Call Log.

8. Get two paying clients. (Delivering any portion, exercise, etc. from any CMMS module qualifies your client as a paying client. Clients can not be a member of the CMMS Training)

9. Complete the CMMS Certification Training Assessment.

IMPORTANT: In an effort to make the collection of documentation easier along your journey we ask that you hold on to your documents as we'll have you submit them all at once.