Stellar Sample Sessions: A Five-Step Process for Turning POTENTIAL Clients Into PAYING Ones!

Chariti Gent and Darcy Luoma

Thank you for attending our break-out session at the ICF Midwest Regional Conference in Minneapolis, MN!

We had a great time exploring and teaching how to deliver Stellar Sample Sessions with you! As promised, we are providing you with some post-session handouts with valuable scripts and templates to help you turn your POTENTIAL clients into PAYING ones!

And, if you are interested to learn more about our advanced teleconference mini-course, The Launch of a Life Coach, we would LOVE to have you! There is a discounted rate if you register prior to July 1, 2013. You can learn more information here: http://darcyluoma.com/the-launch-of-a-life-coach/.

We wish you all the best with your growing coaching practice!

Warmly,

Chariti and Darcy
Email Template: Pre Sample Session

Dear {client name},

Thanks for being willing to check out some coaching with Pink Stiletto Coaching!

PSC would LOVE to offer you a sample coaching session so that you can:

1. “Try on” the coaching services I offer
2. Learn a bit about the style of coaching I employ and how it might benefit you
3. Gain some self-awareness, learning, guidance, direction, etc. on a REAL issue you are currently facing in your life or career
4. Laugh and share a little down time with me and, more importantly, YOURSELF!

All sample sessions are complimentary and, of course, completely confidential.

We are all set to meet at my office on 5/22 from 12-1pm.

My office “within an office” at Keller Williams Realty. The address is 2601 Crossroads Drive, Suite 130, Madison, 53718. When you arrive, let the front desk person know that you are there for a coaching session with Pink Stiletto, and I will come up to the front and fetch you!

Attached, please find information about our sample coaching session, as well as a document titled “The Wheel of Life.” Please read over the information carefully and complete the Wheel of Life *prior* to our meeting. We will use this completed document to help set the focus and depth of our meeting.

I’m also including information about our coaching packages, for your general information. We can talk about options after you’ve “tried on” the sample session and see if coaching is something you’d like to do more of!

Looking forward to it! If you have any questions, don’t hesitate to email or call us!

Thank you so much!
Dear {client name},

It was an absolutely delight talking with you this morning about your life circumstances and how you might benefit from life coaching! You have a warm demeanor and great self-awareness, and I would love the opportunity to coach with you should you decide you want to work together in the future.

As promised, I'm sending you information on how to find other life coaches in case you want to do some more sample sessions. The **International Coach Federation** (ICF) hosts a free searchable directory of ICF coach members called the Coach Referral Service (CRS): [http://www.coachfederation.org/clients/crs/](http://www.coachfederation.org/clients/crs/). Also, I pasted some questions from the ICF below for your reference on what to ask a potential new coach. However, you should note that these coaches are not necessarily certified—it only guarantees that they are members of the ICF—which is the professional association for life coaches. I would recommend that you look through the websites and find a few who interest you and then schedule free sample sessions to see if any are a good fit for you. I hope this helps.

Please let me know if you have any more questions for me. If you decide you want to work together in a coaching capacity with me now or in the future, I'd be absolutely delighted!! The next step would be for me to send you a **New Client Packet** which you would fill out and return to me prior to our **Initial Discovery Session**—which is about 2 hours where we unfold your vision and values, and also design our alliance on how we are going to work together which lays the foundation for our work together in the monthly coaching sessions.

Let me know how/if I can help further. Best wishes to you!

Sincerely,
Coach _____
Questions to Ask a Prospective Coach

ICF recommends asking the following questions:

• What is your coaching experience (number of individuals coached, years of experience, types of coaching situations, etc.)?
• What is your coach-specific training (enrolled in an ICF approved training program, other coach-specific training, etc.)?
• What is your coaching specialty or areas in which you most often work?
• What specialized skill or experience do you bring to your coaching?
• What is your philosophy about coaching?
• What is your specific process for coaching (how sessions are conducted, frequency, etc.)?
• What are some coaching success stories (specific examples of individuals who have succeeded as a result of coaching/how the coach has added value)?
• Why Should I Choose an ICF Credentialed Coach?

The mission of the ICF Credentialing program is to:

• Protect and serve consumers of coaching services;
• Measure and certify competence of individuals; and
• Inspire pursuit of continuous development.
• A coach who has been credentialed by the ICF has completed stringent education and experience requirements and has demonstrated a strong commitment to excellence in coaching.
• Certification from the ICF is extremely important when considering which coach to hire. It means the coach:
• Has received professional training from a program specifically designed to teach coaching skills in alignment with the ICF Core Competencies and Code of Ethics
• Has demonstrated a proficient understanding and use of the coaching competencies as outlined by the ICF
• Is accountable to the ethics and standards set forth by the ICF
Email Follow Up to Sample Session: Option 2

It was an absolute delight talking with you this afternoon about your life circumstances and how you might benefit from life coaching. You have great self-awareness and an authentic and engaging style, and I would love the opportunity to coach with you should you decide you want to work together in the future.

Here’s a recap of the how I work with clients that I outlined today. The process starts with a **New Client Packet** that is filled with powerful questions about your life purpose, vision, values and goals for the future. It helps you determine what your primary focus areas are for the coaching and establishes a strong foundation for our work together.

You would fill this out and return it to me 48 hours prior to our **Initial Discovery Session**—which is about 2-3 hours long, in-person ideally, where you paint a picture of what you are wanting in your life, clarify your primary focus areas and what you are wanting from the coaching, and where we design our alliance on how we are going to work together to maximize your results.

That leads into the monthly coaching, which is two 45-minute phone coaching sessions per month with unlimited phone and email support in between. There is **homework** and designed **accountability** at each step of the way. The cost is normally $500, but I have a 20% discount for those working in non-profit and government sector. So the cost would be $400 for the Initial Discovery Session and $400 for the monthly coaching—paid by PayPal.

There are no contracts and we work together as long as you are getting value out of each session. However, the research shows a minimum of 3-6 months is ideal for sustainable and lasting change. It is truly a transformational experience for my clients to go through this process, and I hear over and over how it creates a safe place for them to take bold and courageous actions.

Also, I usually recommend that you “try on” a few coaches so that you are consciously choosing the best fit for you. As such, I’m sending you information on how to find other life coaches in case you want to do some more sample sessions. The **International Coach Federation** (ICF) hosts a free searchable directory of ICF coach members called the Coach Referral Service (CRS):
http://www.coachfederation.org/clients/crs/. I pasted some questions from the ICF below for your reference on what to ask a potential new coach. However, you should note that these coaches are not necessarily certified—it only guarantees that they are members of the ICF—which is the professional association for life coaches. I would recommend that you look through the websites and find a few who interest you and then schedule free sample sessions to see if any are a good fit for you. I hope this helps.

Please let me know if you have any more questions for me. If you decide you want to work together in a coaching capacity with me now or in the future, I'd be absolutely delighted!! I am at capacity for clients right now, but anticipate having some openings this spring.

Let me know how/if I can help further. Best wishes to you!

Sincerely, Coach ____

[Questions to Ask a Prospective Coach – See Option 1 for List of Questions]
**Email Follow-up to Sample Session: Option 3**

Hello Beautiful {client name}!

Just wanted to check in and see how your homework that we assigned at the Sample Session is coming along...? Feeling like you’re getting some clarity regarding your relationship with xxx?

The next step is to schedule our Discovery Session. I’d love to get that on the books so we can dive in and move you forward in the direction you want to take your life! 😊 Are you ready to start this grand adventure?!? I feel we have a great connection, and I know we’d really enjoy working together. I would LOVE to be your coach!

Here are some upcoming dates that I have available for the Discovery Session:

- May 4 at 2:00pm CDT
- May 7 at 10:00am CDT
- May 10 at 8:00am CDT

Please let me know which one works best for you!

Thank you!

Chariti
Hello!

I’m looking VERY forward to getting started with you on your coaching journey!

The first step is the Discovery Workshop. This 3-4 hour, customized, one-on-one Discovery Workshop will help us to:

• map out what you want from your life
• design our alliance (that’s coaching parlance for designing our relationship!)
• get clear on the outcomes you want from the coaching
• define what your primary focus areas will be
• create benchmarks for measuring your progress over time
• and more!

What a fantastic ride it is!

Attached, please find a small batch of documents that you will need to complete and get back to me within 24 hours PRIOR TO our Discovery Session. The documents that require your completion include:

• Client Interview
• Personal Information Sheet
• Primary Focus
• Coaching Agreement

The Getting Started Letter, How Coaching Works document, and Coaching Packages Info Sheet are for you to read over prior to coming to the Discovery Workshop. There are lots of important nuggets in here to prepare you for the coaching journey, so please take some time to go over all of them.

In a separate email, I will be forwarding you a link to your online DiSC Assessment. This Assessment is yet another tool that I use in the coaching process to inform our awareness about your natural behavioral style. Please complete the online survey prior to our meeting so that I can review the results and get a digital report copy to you prior to the Workshop.
Let me know if you have any questions as you work your way through these materials. It will likely take you about an hour (start to finish) to complete them all, so please make sure you give yourself ample time to get this done PRIOR to our session.

We will meet at my office, which is located at 2601 Crossroads Drive, Suite 130, Madison, WI 53718. I office “within an office” at Keller Williams Realty. Upon your arrival, simply enter the Keller Williams office lobby and let the front desk person know that you are there to see me. Our meeting time is:

Please feel free to bring snacks, beverages, etc. We’ll take several breaks during our session for returning phone calls, emails, etc.

At the end of the Discovery Session, we’ll set the schedule for future sessions together.

Looking VERY forward to this juicy-good journey with you. Thank you for coaching with Pink Stiletto Coaching! If you have any questions as you are completing the paperwork, please don’t hesitate to email me. I truly appreciate your business and am sincerely excited to begin coaching with you.

Here’s to a GLORIOUS and FULFILLING journey!
Sample Script: The Indirect Close

**Coach:** Life coaching is most powerful when there is good chemistry between the coach and the client. I love your energy and authenticity (or personalize it in an authentic way) and would be thrilled to be in a coaching relationship with you. However, this is a big investment of time and money and so you want to make sure you are making the best decision and choosing the right coach for you. As such, I recommend you “try on” a few other coaches and make a conscious choice about who will serve you best. I can send you a link to the International Coach Federation that lists coaches. Most coaches will offer a free sample session where you can learn more about their style, price and see if it's the right fit for you. If, after that process, you decide you'd like to work with me I'd be delighted!

If this sounds good to you, I'll go ahead and forward my list of coaches to you. Does that work?

**Potential Client (PC):** That's great. Thanks.

**Coach:** What email address should I send these to?

**PC:** janedoe@gmail.com

**Coach:** Super. How and when would you like me to follow up with you?
Sample Script: The Direct Close

**Coach**: So, we’ve done some great learning here today in our sample session, and now you’ve got some homework/action items to get you moving! I’d like to know: overall, how was this experience for you today?

**PC**: It was really good—yes, very good.

**Coach**: Excellent. What made it so good?

**PC**: I feel like I got what I came for…even more than I came for. I have clarity now and some new directions to try.

**Coach**: That’s so awesome. I’m really glad that this was worthwhile for you. So, is this something you’d like more of in the future?

**PC**: Yes, yes I would.

**Coach**: Fabulous! Let’s go ahead and pull out our calendars and get the Discovery Session scheduled…(go ahead and schedule it right then and there). Now, let me tell you about what to expect in that Session, and we’ll go from there. Sound good?

**PC**: Yes. I’m really excited!
The Wheel of Life

10 9 8 7 6 5 4 3 2 1

Physical Environment

Career

Fun and Recreation

Money

Health

Personal Growth

Friends and Family

Significant Other / Romance

Fun and Recreation

Money

Health

Personal Growth

Friends and Family

Significant Other / Romance

ICF Conference 2013

Connect with Chariti: www.PinkStilettoCoaching.com | Chariti@PinkStilettoCoaching.com
Connect with Darcy: www.DarcyLuoma.com | LifeCoach@DarcyLuoma.com