



# THE PROFESSIONAL TRUST CHECKLIST

A checklist form on a clipboard. The form has a white background and a black border. It features six items, each with a yellow circular checkmark on the left and a grey horizontal line on the right. Below the items is a large grey rectangular box. The clipboard is held by two black corner clips.



## PROFESSIONAL TRUST CHECKLIST



### PROMOTION PLAN

- \_\_\_ **WHAT:** A monthly promotion plan for promo activities (social media, blogging, email, networking, etc.).
- \_\_\_ **WHY:** Activities (big & small) are planned and scheduled to create clarity and consistency... and eliminate the “what do I need to do today” syndrome.



### AUTOMATED COMPLIMENTARY CALL PLATFORM

- \_\_\_ **WHAT:** Use of a calendar system/app to allow potential clients to quickly and easily schedule a complimentary call.
- \_\_\_ **WHY:** Helps to eliminate back and forth scheduling and reinforces the fact you are a professional with helpful systems in place.



### MINUTE BY MINUTE STRATEGY FOR COMPLIMENTARY CALL

- \_\_\_ **WHAT:** A step by step strategy to know what to do, say and ask during the Complimentary Call.
- \_\_\_ **WHY:** Gives you the confidence to be more clear and effective and provides an authentic pathway for “great fit” clients to become paying clients.



### COACHING PACKAGES CLEARLY DEFINED

- \_\_\_ **WHAT:** A set of coaching packages that are defined, differentiated and valued.
- \_\_\_ **WHY:** Knowing WHAT you offer and HOW much it costs will help you to demonstrate you are a professional and enable you to charge the rates you deserve.



### PROPOSAL & CONTRACTING TEMPLATE

- \_\_\_ **WHAT:** Templates so you can customize and send professional proposals quickly and efficiently after a Complimentary Call.
- \_\_\_ **WHY:** Provides one more tool to reinforce that you are a professional. Plus it helps....



## INVOICING & REVENUE SYSTEM

\_\_\_ **WHAT:** Use of an online invoicing platform/app which allows you to receive payment quickly.

\_\_\_ **WHY:** Helps to further demonstrate your seamless systems, simplifies things for your client and helps you to get paid quickly and efficiently.



## ASSIGNMENT FOR FIRST "OFFICIAL" COACHING CALL

\_\_\_ **WHAT:** An assignment/activity you can send your new coaching client to get them engaged after you've processed their payment.

\_\_\_ **WHY:** This gives them something to look forward to, it helps to get them started right away and gives you something new to discuss on your first "official" coaching call.



## MINUTE BY MINUTE STRATEGY FOR FIRST "OFFICIAL" CALL

\_\_\_ **WHAT:** A step-by-step plan for how to direct and guide the initial call.

\_\_\_ **WHY:** Having confidence in your process will help you to be more effective and help you to look forward to first calls.



## ABILITY TO COACH

\_\_\_ **WHAT:** Commitment to continued learning and growing of your coaching abilities.

\_\_\_ **WHY:** Further development leads to increased confidence, better results, more enjoyment and higher profitability.



## VALUE MY COACHING ABILITIES

\_\_\_ **WHAT:** Assigning a value to your coaching and charging rates you are happy with.

\_\_\_ **WHY:** Charging professional-level rates enable your clients to invest in themselves and allow you to live more of the life you want to live.