

A close-up, high-angle shot of a person's hands typing on a silver laptop keyboard. The person is wearing a white long-sleeved shirt, a silver metal watch on their left wrist, and several silver bracelets on their right wrist. A silver ring is visible on the ring finger of both hands. The laptop is open on a wooden desk. In the background, a white notebook with a pen lies on the desk. The entire image has a soft, light-colored overlay.

QUARTERLY
CLIENT CREATION
SYSTEM *for Coaches*

HOLISTIC COACH TRAINING INSTITUTE

Dear Holistic Coach,

I've created the Quarterly Client Creation System to provide you with a focused action to take each week in your coaching business so that you are consistently inviting your people into offers while growing your community and network.

Each week, you will be provided a sales action to help increase your Discovery Calls and conversions.

I've put together a well-rounded approach that will take the guesswork out of your sales process because you and I both know you are here to coach, not spend your time spinning wheels on what action to do when.

We know how important it is that you have a consistent flow of Discovery Calls that you can invite into your offerings. We also know that when you are starting off, you have to find your unique flow to create that consistent system of calls that converts to Clients.

One of my personal superpowers is creating easy to follow frameworks that are effective when done consistently. Take this system, no cost to you, so that you can start to experience which ways help you best create Discovery Calls for your business.

To get the most out of this freebie, you will need:

- Energy that is open for business
- A proven offer that sells
- A community of people to sell to

Not at that place yet? Check out our self-directed [Holistic Coach Business Start-up Course](#) so that you can get some of the fundamentals in place before you focus solely on increased Discovery Calls and Clients.

This quarterly calendar will take you through 13 actions that you can repeat each quarter to create momentum, increase your Discovery Calls and Client roster while seeing which ways best suit you. These actions are meant to be free and organic ways to create Discovery Calls and Clients.

It's quite fun to see which actions heed the best results for you and your coaching business.

Here's to increased calls, invites and people saying 'yes' to working with you.

I truly believe that we can change the world through coaching. I love to help people self-realize through learning how to give and receive holistic coaching. The more people you work with, the more people get to be positively impacted through coaching.

Bev

President of Holistic Coach Training Institute

QUARTERLY CLIENT CREATION SYSTEM HANDOUT

YEAR: _____ QUARTER: _____

ACTION:	DATE:	RESULTS:
<input type="checkbox"/> Message Inner Circle (25)	_____	_____
<input type="checkbox"/> Low Cost Coaching Sessions (5)	_____	_____
<input type="checkbox"/> Follow-up with Interested (10)	_____	_____
<input type="checkbox"/> Share offer via video	_____	_____
<input type="checkbox"/> Outreach via partners (10)	_____	_____
<input type="checkbox"/> Schedule Discovery Calls (5)	_____	_____
<input type="checkbox"/> Ask for referrals (10)	_____	_____
<input type="checkbox"/> Leverage raving fans (25)	_____	_____
<input type="checkbox"/> Invite new people (10)	_____	_____
<input type="checkbox"/> Leverage partner's community (10)	_____	_____
<input type="checkbox"/> Resign clients (10)	_____	_____
<input type="checkbox"/> Leverage group participation (5)	_____	_____
<input type="checkbox"/> Intuitively connect (10)	_____	_____

CLIENT CREATION STRATEGY #1

Intention: Utilize your Inner Circle of people to generate connections, conversations and Clients.

Action: Write an email or message to 25 people in your Inner Circle and let them know what you are currently up to and offering to the world whether you are getting started or have had a niche or offer change. Share your passion and purpose with them. See who they might know that would be a fit for your offer. Example: Q1 Past Colleagues, Q2 Friends, Q3 Current Coaching Colleagues, Q4 Raving Fans or a combination of any of these each quarter

Take and tweak sample message:

Hi Suzy, Something special has happened with me in the past month. I've stumbled upon a new niche that was right before my eyes all along. I've been so connected to 'recovery' that it took me some time to see that most of those coming to me were helping professionals. Though I will always be open to serving those looking for Alternative Recovery, I've set a new intention that feels very right, clear, and obvious – it's the journey I've been traveling on for a long time and didn't even realize. I'd like to share this new niche with you.

Here's how it came about....

I was being coached on a group call, when I realized that most of the people in my online group were aspiring coaches of some kind. People have been coming to me needing support around "doing their own thing" and upleveling their lifestyle. When I took a step back and looked at my own process, I realized that I, myself, had taken a massive risk by letting go of a well-paid and stable job. The risk I took was in service to a calling inside of myself to own a business and coach people into passion and purpose.

Here's what I found....

More and more people are wanting to connect with their purpose, and let it shine! Helping professionals often put their own Heart's Desire on the back-burner so that they can be of service to others. In fact, this behavior can become maladaptive. In turn, we lose touch with our own needs and wants. I remember undervaluing myself for the sake of "doing good work" that I loved. However, resentment can build and we can lose sight of what's meaningful to us when we solely focus on serving others.

So, I'm taking a stand, in loving support, of all those amazing helping professionals out there. Truly, you have the opportunity to really impact people in a positive way but when you are NOT living YOUR potential, it's hard to help others find theirs.

Here's what I've got for you....

In order to jumpstart my new niche, I'm gifting 45-minute Back-burner Begone Breakthrough Sessions to my inner circle over the months of September and October.

In this session, you'll discover:

What's been stopping you from stepping into your potential?

What it is you REALLY want right now?

A crystal clear step-by-step plan to prioritize yourself first in the next 90 days or less.

An action plan for the next 7 days.

This is a great opportunity to see what it would be like to invest in yourself and work with me as your personal coach.

For the months of September and October, these sessions are complimentary. If you or someone you love could benefit from increasing self-worth and decreasing self-doubt, schedule a session here: (Put scheduling link here).

Become the healthiest version of yourself and help others from that place!
Bev

P.S. When booking, you may notice my schedule is really full next week. I'm headed to The Big Easy to coach a team around personal development! Opportunities are opening up, and I can't wait to coach with you or someone you know! Thank you! (Share a small genuine story of something good happening for you here;)

CLIENT CREATION STRATEGY #2

Intention: Provide sample coaching to people so you can grow your community and start to create referral opportunities.

Action: Offer 5 spots of low cost 30 minute coaching sessions

Take and tweak sample message:

Hi Suzy, I have 5 spots available in my calendar this week to provide a 30 minute Focus Session for you. Normally, I charge \$150 for a 60 minute coaching session. Grab a deal at \$50 for a 30 minute coaching conversation on something you want to be experiencing more of in your life right now. What's that thing that your soul truly wants to be experiencing right now? Let's hop on a call, give some life and energy to what you want so that you can be moving towards your Desired State now. I'm here to help you get laser-focused on creating what you want to be experiencing. Truly, Bev

CLIENT CREATION STRATEGY #3

Intention: Build relationships with people in your community while staying top of mind as someone who is available to help them solve their problems or create what their heart desires.

Action: Follow-up with people who have been interested yet not signed up

Take and tweak sample messages:

Swinging back around to see what action you've taken since our phone call.

Or Swinging back around to see how things are unfolding for you and if working together may be a better fit now?

Or Swing back around to see how things are going for you and if working together would support you in getting there faster?

CLIENT CREATION STRATEGY #4

Intention: Be visible with your Essence and offers, letting people know that you are open for business.

Action: Do a video or FB Live on your current offer: who it's for, benefits to it and what problem it helps them solve. Share on your social media handles and in groups. Don't forget to invite people in! #offers

Take and tweak sample messages:

Head to [Holistic Coach Network](#) and see how others have shared about their offers via video. If you aren't a member yet, request to join.

CLIENT CREATION STRATEGY #5

Intention: Build effective business relationships while leveraging other people's communities.

Action: Outreach to 10 people for connections, collaboration or partnerships. Be clear about how you can support or serve the people you reach out to. Propose 1-3 ways that you could support this person's community that would be beneficial for all.

Example: Q1 Connections, Q2 Collaborations, Q3 Partnerships Q4 a combo or you could do a combo each quarter.

Take and tweak sample message from a proposal:

Overview

Per our discussion last week, CWP is intending to provide a continuum of care service for clients beyond the current Case Management and Alumni Services. We discussed how Recovery Coaching could act as a bridge to move clients beyond maintenance while keeping clients connected to CWP should they need more intensive services.

Potential Services

Weekly groups: I could host weekly recovery coaching groups (1-2) that provide specific coaching exercises. These groups would be informative in nature yet also include an interactive and support group element.

Support a private FB Group/Alumni Page: I could post recordings of groups into a private FB group or Alumni Page so that people who couldn't make live meetings still have access to materials, can engage at a more convenient time and stay connected to the CWP community.

Coaching: I could provide 30 minute coaching sessions to clients who want that service. Happy to talk through what would be most useful for those you serve.

Thanks for your consideration.

Bev

CLIENT CREATION STRATEGY # 6

Intention: Become highly confident in your Discovery Calls so that you more easily enroll prospective Clients into paying Clients.

Action: Schedule 5 Discovery Calls with potential Clients or practice 5 Discovery Calls with practice partners

Take and tweak sample message:

Sample #1:

Dear Community, I've got some openings for 1:1 coaching and wanted to see if anyone would like to discuss my current offerings to see if they might be a fit in supporting what you want to create in your life right now. If you'd like to connect and hear how I might be able to be of service to you, schedule some time here. I always love hearing what your soul wants to create! Thank you! Bev

Sample #2:

Dear Community, I'm in need of practicing my Discovery Calls so that I can get more confident in talking about my offers. Would anyone in the group be open to hopping on a mock Discovery Call with me so that I can practice. If so, please shoot me a dm. Thank you, Bev

CLIENT CREATION STRATEGY #7

Intention: Utilize your network of people who already know, like and trust you.

Action: Follow-up with people you have worked with before to see who they might know as a referral.

Take and tweak sample message:

Sample #1:

Hey Suzy,
Hope this message finds you well.
I'm reaching out to people in my community to see who you might know that would be a good fit for our (share offer here.)
You get the Essence of the people that enjoy my offers and who I enjoy working with so thought I would see if you know anyone who would be a good fit.
Next steps would be to connect us via an email if you know someone who would be open to a conversation about our services.
It means a lot to get your support in building our community with other heart-centered people intending to do good work into the world.
Thank you for your consideration.
And please let me know if there is anything I can do to support you.
Bev

Sample #2:

Suzy,

Hope you are well!

I'm messaging everyone I've coached and am asking that you refer at least one person for a free coaching session. Please think of someone and feel free to gift them a coaching session or just direct them to me. An introduction email would be super helpful, if you think of someone.

Really appreciate you taking the time to think of someone who may be a fit. You know I'm on a mission to serve people's soul through my coaching. - Bev

CLIENT CREATION STRATEGY # 8

Intention: Continue to build relationships as establishing a strong network of people is essential to growing a coaching business.

Action: Write a list of 25 raving fans or connections that support you and your business. Once you have your list, message each of these people with a personal message of connection and appreciation.

Take and tweak sample message:

Hey Suzy,

Thought I would swing by and see how things are going for you? Always love hearing what you are up to. I've been working on my new podcast. Would love for you to listen and share with anyone you think could benefit from it. Let me know how I can support you and your current efforts. Thank you! Here's the podcast link: <https://anchor.fm/holistic-coach-legacy>. Truly, Bev

CLIENT CREATION STRATEGY # 9

Intention: To be successful in your business, you need to grow your community. Continue to grow your community by inviting new people into it.

Action: Invite 10 new people into your group, onto your list or into a new offer.

Take and tweak sample messages:

Inviting people to your list via messenger: Hi Suzy, It's been a minute. Hope you are so good. You might have seen that I've started my own coaching business. Super exciting, right?! You always encouraged me to do my own thing. Thank you for that! I've started writing to my community a couple of times a month. I call it "The Insider's Guide To Personal Mastery." It's all my best tips on mastering life after adversity. I would love to have your support. Would you like to receive my bi-monthly emails? If so, I would just need your email. Many thanks and blessings to you! Best regards, Bev

Inviting people to your list via email: Suzy, I'm working on building my list and would love to have you join. I send out communication 2x/month called "The Insider's Guide to Personal Mastery." It's tools and tips to support you in personal mastery around your vision, beliefs and desires. Who couldn't use a little more of that, right? If this sounds like something interesting to you, let me know...yes or no! Truly, Bev

Inviting people to your group: Hi Suzy, I noticed you are doing recovering coaching, like me. I have a free FB group for people who are doing similar work. Here is a description of the group. Post short description. If it feels like a fit, I would love to have you join. What are your thoughts? Best regards, Bev

CLIENT CREATION STRATEGY #10

Intention: Leverage other people's communities while you grow yours. Truth is that other people need good content for their communities too. So be a good resource for them!

Action: Schedule a talk, podcast or guest blog to leverage other people's communities.

Take and tweak sample podcast message:

Suzy,

Sending a message here to formally ask if I could be on your podcast?! I have personally coached women who have cited your podcast as a support for their recovery. REMARKABLE!

As you know, I have recently written a book on my recovery from trauma, substances and mental health through learning and applying Spiritual Psychology. It's called, Transcending Trauma: How I used Spiritual Psychology to Healing my Life. I think it's a unique perspective on recovery and healing.

What we could discuss?

- 1) A Healing Roadmap. I created a healing roadmap in support of people having a visual and understanding a breakdown of the healing journey. It's helpful to hear different signpost along the way.
- 2) How Spiritual Psychology supported me in letting in the love after years of being disconnected and shutdown. This learning how to let in love has been essential to my healing and further co-creations.
- 3) How unresolved issues or unfinished business in your consciousness can get in the way of your highest potential. Taking responsibility for what's in your consciousness can be one of the most liberating moments in healing process.

Or happy to discuss a different topic that you feel would most benefit your listeners.

I know it's the holidays + I'm all booked out until March 2021. Therefore, I was hoping you had some availability in March or April, Suzy. It would be a great joy to spend time with you on (podcast name).

Thank you for your consideration.

Happy Holidays and many blessings to you and yours, Bev

CLIENT CREATION STRATEGY #11

Intention: Leverage know, like, trust factor already built by resigning current or past Clients.

Action: Resign current or past clients to new offers.

Take and tweak sample message:

Hey Suzy,

Wanted to reach out and personally invite you to the Recovery Ripple Project. Think this could be a cool way to keep walking down a purposeful path.

I'm inspired and excited by the projects that people are considering.

We are doing a 3 month process to support you in creating some Passion Project for the recovery month which is in September.

Doesn't matter how big or small of a project. It's just about giving back in some way. Would love to have you fill out an application here.

It would be great to have you included!

Bev

CLIENT CREATION STRATEGY #12

Intention: Leverage the groups that you participate in by being an active participant and being visible with your gifts, talents and skills so you can create Clients.

Action: Reintroduce yourself in the groups you are participating in letting them know who you work with, how you work with them and how you can support others. Start by hopping into the Holistic Coach Network and introducing or reintroducing yourself there. I highly recommend doing a live or video because this is the best way for people to connect with your Essence.

Take and tweak sample message: See other introductions in the Holistic Coach Network by searching for #introductions.

CLIENT CREATION STRATEGY #13

Intention: Be intuitively guided when building relationships with people in your network.

Action: Intuitively connect with at least 10 people this week that you feel called to connect with. Trust the process. Trust the Universe. See what happens.

Take and tweak sample message:

Hi Suzy, you popped into my consciousness this week as someone to connect with. Thought I would reach out and see how things are going for you. - Bev

FURTHER INSTRUCTIONS:

Rinse and repeat these strategies each quarter to see what results can be created. Share your learnings, lessons and victories with us in the Holistic Coach Network.

If you need any additional support on creating offers, check out our [Holistic Coach Legacy Podcast](#) episode where Richard and I talk through some tips around creating your first offers.

By consistently engaging this Quarterly Client Creation System, you will continue to build relationships in your network, increase your Discovery Calls and increase the number of Clients that you are working with in your coaching business.

Let Client Creation be enjoyable and fun. And allow yourself to be continuously stretched into your greatness.

Here's to serving more people with your awesome skills and talents.

Beverly Santain

BEVERLY SARTAIN | SARTAIN SOOLUTIONS



Beverly Sartain helps helping professionals develop their coaching skills so that they can become effective in the behavior change process while positively impacting their own personal and professional lives.

She is uniquely qualified to support you in taking your life's challenges and turning it into your life's work. She recently celebrated 15 years of recovery from substance use, mental health and trauma. She uses Spiritual Psychology to support clients in deep transformative results. Beverly is a demonstration of someone who went from 10 years of non-profit work into her own coaching business.

Beverly provides guidance around the personal growth, coaching skill development and business set-up strategies necessary to take your purpose-driven business from wishful thinking to off the ground and running. Beverly is a master at bridging the gap between coaching certification and business set-up. She enjoys supporting you in applying what you are learning so that you can have your own breakthroughs and experience while truly enjoying the process of entrepreneurship.

Beverly loves using professional advancement as an opportunity for spiritual growth. She will wow you with her compassionate language, ability to challenge you to stretch beyond your comfort zone and provide intuitive hits that come through during sessions. If you would like to connect with Beverly to see how you might work together, [schedule a call](#).

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