

Starter Phase Checklist

VISION

Clarify your why
Articulate your bigger mission
Adopt a success mindset
Set your lifestyle goals
Harness your unique brilliance
Ask “Who am I as a \$___/year coach?”

PLAN

Focus on simple 1:1 biz model
Choose your starter niche
Choose your starter PMM
Design 1-2 offers/packages with titles
Use tiered pricing for easy yesses
Set a “by when” date to have your first 5 clients

CLIENTS

Create your EC pre qualifying materials (“Prepping For Your Session”, “Interview With Me”, Success Stories)
Upgrade your money mindset
Choose 1 main dish, 2 side dish marketing strategies
Collect success stories

BRAND

Create starter signature story
Create simple social media plan
PRESS SEND (dare to be seen and heard)

BUSINESS SYSTEMS

Create your coaching/marketing BLOCK schedule
Create simple client onboarding system

- Decide how you’ll take payment
- Send program agreement for electronic signature
- Send “Welcome” email with program details + how to schedule sessions
- Send “Box of Goodies” (optional)

Phase 1 Checklist

Phase 1 - (Up to \$50K)

VISION

Upgrade beliefs about self, others and the world
Pick 3 self care

PLAN

Create your yearly schedule
Refine niche & PMM
Create your Signature System
Revisit your business model (consider adding small groups to 1:1 coaching)
Raise your private coaching fees

CLIENTS

Start building an email list
Upgrade your money mindset
Increase the consistency and frequency of “main dish” and “side dish” strategies
Collect success stories

BRAND

Create 1-3 page website
Have 1-2 “good enough” headshots/photos
Refine social media plan
Create email marketing plan
Refine signature story

BUSINESS SYSTEMS

Consult re: creating business entity
Open business checking and savings account
Track expenses and income
Start paying yourself
Save for taxes
Choose email marketing and online payment platform
Get liability insurance

Phase 2 Checklist

Phase 2 - (\$50 - \$100K)

VISION

Revisit and refine all Vision bullets in Starter Phase
Uplevel beliefs about money, visibility and success
“Pick 3” self care

PLAN

Refine your yearly schedule
Refine business model
Refine niche & PMM
Refine packages
Raise your private coaching fees
Refine your monthly revenue plan

CLIENTS

Continue building email list
Consider larger visibility & authority
Update your EC pre-qualifying system
Refine and/or enhance your client experience
Collect success stories

BRAND

Invest in copywriting training
Refine your messaging
Invest in personal brand photos
Develop joint venture and affiliate relationships
Revisit and/or enhance design/look of brand

BUSINESS SYSTEMS

Give yourself a raise
Outsource personal tasks
Open a biz credit card
Work with an accountant for tax planning
Update program agreement and/or client onboarding system if needed
Choose and/or refine shopping cart system and credit card merchant

Phase 3 Checklist

Phase 3 - (\$100K +)

VISION

- Uplevel your money mindset
- Explore your beliefs about visibility and success (“Who am I to ____”)
- Revisit and refine all Vision Bullets (in Starter Phase)
- Double down on self care and boundaries

PLAN

- Refine your business model (including packages and fees)
- Create or refine your scalable revenue engine
- Refine your monthly revenue plan
- Messaging check: Do I have a million dollar message?

CLIENTS

- Uplevel your plan for generating leads
- Track data for all lead channels
- Set email list building goals for every quarter
- Collect success stories

BRAND

- Refine your messaging
- Increase email marketing and social posting frequency
- Invest in personal brand photos
- Revisit and/or enhance design/look of brand
- Develop joint venture & affiliate collaborations

BUSINESS SYSTEMS

- Outsource work tasks to free up your time
- Revisit your tracking systems for income and expenses
- Work with an accountant for tax planning
- Choose a financial advisor to create investment plan
- Set checking and savings account minimums (biz and personal)