WELCOME TO LIFE COACH HUB!

TURBO-CHARGE YOUR COACHING!

Streamline your coaching, earn a passive revenue and get new clients. It's all possible with the Life Coach Hub online coaching system. This tutorial will take you on a tour of the system and all the ways it can help take your coaching business to the next level! Work through each step and it will be marked as Done. Don't miss out—make sure you get all the items on your Action List ticked off to skyrocket your career.

ACTION LIST

STEP 1. CREATE AN AWESOME PROFILE

To get listed in the directory, all you need to do is fill in your profile information. Make sure to give an original, compelling description of yourself and how you like to coach, and upload a professional photo. Create your profile by clicking Profile & Settings.

STEP 2. CUSTOMIZING YOUR PERSONAL WEBSITE

Now it's time to personalize your very own storefront and subdomain! This is where your **clients will login** to access their coaching plans and coaching tools, and access products and services. This is also where you'll have your own gorgeous **coaching shop** for people to buy your coaching and courses, and **pay for your services**.

Customize your personal website by clicking on Customize My System.

STEP 3. ADD TO YOUR COACHING CATALOG

To get paid securely by clients when they contact you, add your **coaching offerings and packages** to your catalog.

Once you've set up your coaching for sale, you can use a whole range of online coaching tools and scheduling. You'll also be able to invite your current clients to coach with you, and start to get verified coaching hours showing up on your profile.

When adding to your coaching catalog, consider setting up a course in order to deliver your coaching content effortlessly, or do group coaching. You can list other items in your shop for sale too, such as digital products and services.

Add items to your catalog by clicking on Sell Your Coaching.

STEP 4. ADD YOUR PAYMENT DETAILS TO GET PAID SECURELY

To make sure you paid securely and on time by your paying clients, set up your PayPal details and Business information. Just click on Settings under Profile & Settings and then select Payment Settings.

STEP 5. START GETTING CLIENTS

Now it's time to start getting clients!

1. To get more attention on your profile, start racking up verified coaching hours. **Coaches with verified coaching hours get 60% more inquiries**. It's easy. Just invite your existing clients (either pro bono or paying), and schedule your appointments with them using the system.

2. Ask current and past clients to leave you reviews. **Coaches with reviews for their coaching and services receive 45% more profile views**.

STEP 6. MANAGE YOUR COACHING TO WIN BACK TIME AND INCREASE CLIENT SATISFACTION

Use a whole range of cool coaching tools with your clients. This will allow you to set-and-forget all sorts of elements of your coaching, winning you back tons of time. You'll also help your clients reach their goals faster, and increase their satisfaction with the added perceived value of the interactive features you provide them. All these tools are at your command, and can be reused multiple times in our coaching, saving you needless repetition:

1. **Welcome package**: Get important information about your client's coaching goals, and have them sign their agreement.
2. **Coaching plans**: Structure each session with purpose and direction and make sure your client remembers each appointment.
3. **Journals**: Get your clients to reflect on their personal issues, using a proven coaching method.
4. **Goals**: Help your clients set, track and reach their goals
5. **Homework and action items**: Get your clients to take action!
6. **Assessments and forms**: Assess areas of strength and weakness, and deliver customized forms.
7. **Resources**: Create or upload additional documents and files for your clients' access.
8. **Feedback surveys**: Get ongoing feedback about your coaching by assigning surveys.

Follow this link to read our tutorial about the coaching tools available to you.

STEP 7. CREATE SET-AND-FORGET COURSES, AND GROUP COACHING

Expand your coaching repertoire and earn more money by increasing your offerings. You can create content delivery courses that deliver material automatically, saving you time and hassle, while also integrating cool interactive coaching tools. You can also offer group coaching, reaching more people in the same time frame.

Follow this link to read our tutorial about how courses work.

STEP 8. REACH A WIDER AUDIENCE BY SUBMITTING ORIGINAL ARTICLES, TIPS AND VIDEOS

A great way to reach potential clients is to have us publish your original articles, tips and videos. These contain a link to your profile, as well as your Contact Me and Request a Free Consultation buttons. We aim to provide high quality, unique content, so feel free to submit content that has not and won't be published anywhere else online. Submit an article, tip or video by clicking on Market Yourself.

TEST DRIVE A DEMO

Want to see an example coach and client account, all set up? Test drive our DEMO:

COACH LOGIN PAGE:

https://www.lifecoachhub.com/accounts/login

EMAIL- democoach@lifecoachhub.com

PASSWORD- democoach

CLIENT LOGIN PAGE:

**https://democoach.lifecoachhub.com/login**

EMAIL- democlient@lifecoachhub.com

PASSWORD- democlient

STEP 1: GET LISTED IN THE DIRECTORY

Start getting new clients by creating a directory listing. Your profile in the directory is the best way to get known and start attracting clients. Create your listing now or skip this step and do it later from the Profile link under Profile & settings in your dashboard.

CREATE A DIRECTORY LISTING NOW

INSTRUCTIONS FOR CREATING YOUR PROFILE

To get listed in the directory, all you need to do is fill in your profile information. Select Profile from the Profile & Settings drop-down in your main dashboard menu.
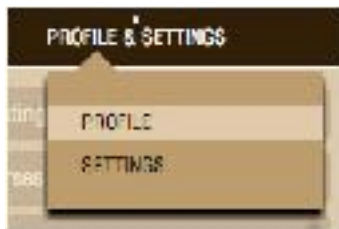
On the Profile page, there are two tabs. Make sure to complete the information on both tabs, and be as complete as possible in your responses to help you attract clients.

Searchable Information Tab

The searchable information tab asks for the information prospective clients will be searching for from the Find a Coach directory page.

Where it says Types of Offerings, tick each relevant box and then fill in a short description explaining the types of offerings of that variety that you provide.

Private coaching is regular one-on-one coaching that can take place over the phone or in person, which you can administer from Coaching management in your dashboard.

Online coaching takes place completely online and is easy to administer using the coaching tools in Coaching management.

Short courses or group coaching can be run as either group coaching sessions with group coaching calls, or courses that deliver information in modules at pre-scheduled times. Expand your repertoire by offering group coaching to reach a greater number of people, or information products in the form of courses.

Ongoing training refers to training you might offer that lasts a significant amount of time and might confer some type of credential upon completion. For instance, you might offer coach training or business training.

Description Tab

The description tab asks for information that will complete your profile page, and allow clients to get a sense of who you are, what your background is, and how you coach. Make sure to fill this information in as fully as possible to give a good sense of who you are to prospective clients.

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OPTIMIZE YOUR MARKETING

The section Optimize your Marketing at the bottom of the Description tab is important to complete as it will allow us to bring more traffic and potential clients your way.

This section helps us to link your profile on Life Coach Hub and all articles and tips you post, directly to your Google + profile, validating your contributions. Google will position you higher in the search engine results if you do this, allowing you to reach more people.

Just follow the easy steps laid out in this section to link your Google + profile and optimize your marketing.

VIEWING YOUR PROFILE

You can view your profile by clicking the View Coach Profile link on the left hand side menu.

PROFILE

Searchable
information

Description

View coach profile

www.lifecoachhub.com

STEP 2: CUSTOMIZING YOUR PERSONAL WEBSITE

GET SET UP: WEBSITE SETTINGS

Now it's time to personalize your very own storefront and subdomain! This is where your **clients will login** to access their coaching plans and coaching tools, and access products and services. This is also where you'll have your own gorgeous **coaching shop** for people to buy your coaching and courses, and **pay for your services**.

[CUSTOMIZE YOUR SUBDOMAIN NOW](#)

CHOSING A SUBDOMAIN AND LINKING TO YOUR WEBSITE

You should already have chosen your subdomain name when you registered. You can see it and edit it if you like under Website settings. After you press Save, a link will appear where you can visit the subdomain (don't worry you can customize your design and content in the next steps!).

Under this, you can enter your current website URL if you have one, which will link from your new subdomain.

Then you can enter your contact information for the footer of your subdomain pages.

LINKING FROM YOUR WEBSITE TO YOUR SUBDOMAIN

If you already have a website, you'll want to **add links to your subdomain, to let your clients login to their dashboard, and to link to your Shop**. After you choose your subdomain, these will be entered automatically. Just copy and paste and place one or more links in the HTML somewhere prominent on your site. If are able to create new tabs, you could make the tab a link to each page, and name one Shop and the other Login. You can also give the direct link to any client if you would like.

CONTACT ME AND REQUEST A FREE CONSULTATION BUTTONS

If you'd like to have prominent buttons for visitors to contact you and request a free consultation, you can choose to show them here. It's easy to update this information at any time, for instance if you go on holiday.

SOCIAL LINKS

Cut and paste the URLs from your social media pages in this area if you'd like them to appear on your subdomain.

CUSTOMIZE YOUR LOOK AND FEEL: WEBSITE DESIGN

Now you get to upload your logo and choose colors to match your brand!.

UPLOAD YOUR LOGO

Here is where you can customize your business presence! The **logo you upload** here will appear as the header of all public pages on your site, as well as the logged in area. It will also show at the top of your invoices, and appear at the top of emails and notifications to your clients for things like journals, goals, and appointments.

Your logo will be resized to be a maximum height of 60px and width of 240px to look great on your website and correspondence :) You'll be able to preview how it looks in the next step, Website Content, when we do the Live Preview (super fun!)

WEBSITE DESIGN

Choose a color scheme for your site. You can choose a main color, secondary color and highlight. You'll be able to preview how it looks in the next step, Website Content, when we do the Live Preview (very cool!)

TELL YOUR OWN STORY: WEBSITE CONTENT

Now's the time you get to edit text and images on your site to make it your own.

You'll automatically get a login page where clients can register and access your online coaching system. You can also choose which additional pages you'd like to include on your mini-site.

LOGIN PAGE

Your **clients will login to their online coaching system** from this page, **download** any product or service materials, make **appointments** and communicate with you.

META INFORMATION

You can choose the meta title and description for your page, to optimize it for SEO and user friendliness. The title and description will show up when **people search on Google**,so you'll want to make them clear and enticing.

LIVE EDIT FOR LOGIN PAGE

To change the text on this page, we've designed an intuitive system where you can preview the page and edit it by clicking on text.

1. Click on the button Preview and edit page.

LIVE EDIT FOR LOGIN PAGE

Click here to edit your Login page, where clients can register and access your onlir the text to explain for your clients how they can log in, and what is available for the text that becomes highlighted when you hover over it.

Preview and edit page

2. You'll be taken to a new tab where you will see the page as it will appear on your subdomain.

3. When you hover your cursor around the page, you'll see the text become highlighted. Click on any **highlighted text to edit it**.

WELCOME PAGE

If you don't have a website, and even if you do, feel free to add a **beautiful, responsive Welcome page** to your subdomain.

YES OR NO

Click Yes if you'd like to add this page and No if you don't.

WELCOME TAB

There will be a tab in your subdomain for each page (apart from the Login page, which is a link on the top right). You can choose a name for this tab here.

META INFORMATION

As for the login page, you can choose the meta title and description of the page, which will show up in **Google searches**. This should be descriptive, concise and interesting.

TESTIMONIALS

You can choose to **display testimonials** on this page. Choose either Yes or No.

1. If you choose YES, then you can write here the title, author and text of your testimonial.
2. Press Save.
3. To add another testimonial, just click Add additional testimonial

LIVE EDIT FOR WELCOME PAGE

To change the text and images on this page, we've designed an intuitive system where you can preview the page and edit it by clicking on text and images.

1. Click on the button Preview and edit page.

LIVE EDIT FOR WELCOME PAGE

Click here to edit your Welcome page. You'l be able to edit any text that becomes highli images.

Preview and edit page

2. You'll be taken to a new tab where you will see the page as it will appear on your subdomain.

3. When you hover your cursor around the page, you'll see text and images become highlighted. Click on any **highlighted text** to edit it. Click on the **highlighted images** to change them.

COACHING SHOP, FEES AND PAYMENTS

www.lifecoachhub.com

Create your own Personal Shop, and list the items and offerings in your catalog (you'll add items to your catalog in the next step of this tutorial). You can also allow clients to **make payments directly to you** if you have arranged for them to be an ongoing client, or pay in some other way. This page also lets you describe your fee structure here to new clients.

YES OR NO

Click Yes if you'd like to add this page and No if you don't.

TAB TITLE

There will be a tab in your subdomain for each page (apart from the Login page, which is a link on the top right). You can choose a name for this tab here.

META INFORMATION

As for the other pages, you can choose the meta title and description of the page, which will show up in **Google searches**. This should be descriptive, concise and interesting.

MAKE A PAYMENT

If you'd like to **let clients pay you for your services** without having to purchase something from your shop, you can do so. Add the section "Make a Payment." Clients will fill in an amount to pay, and be redirected to Pay Pal where they can pay you directly.

LIVE EDIT FOR COACHING SHOP, FEES AND PAYMENTS

To change the text on this page, we've designed an intuitive system where you can preview the page and edit it by clicking on the text.

Don't see any Shop items listed? Don't worry, you just need to add some from to your catalog (next step in the tutorial we'll cover how to do this).

A note about **images** — Because the shop item images are automatically propagated by your catalog listings, you'll need to change these directly when you create or edit your catalog.

CUSTOMIZE YOUR SUBDOMAIN NOW

STEP 3: LIST YOUR COACHING, COURSES, PRODUCTS & SERVICES

A) CREATE A COACHING OFFERING

Take advantage of dynamic coaching tools such as journaling, assessments, goals and coaching plans, as well as automatic administrative functions. List coaching offerings that you would like to offer, such as "Three months of wellness coaching with Coach Claire."

After purchasing one of your offerings, clients will gain access to their personal dashboard where they can interact with you. You will be able to offer value-added coaching using a range of tools, send automatic invoices, and more.

CREATE A COACHING OFFERING NOW

INSTRUCTIONS FOR CREATING A COACHING OFFERING

List your coaching offerings now or skip this step and do it later from the Catalog link under the Billing & Shop drop-down in your dashboard menu bar. Select the link "Add new coaching" from the left hand menu.

Catalog

View
    All Items
    Coaching
    Courses
    Products
    Services

Add
    Add new coaching
    Add new course
    Add new product
    Add new service
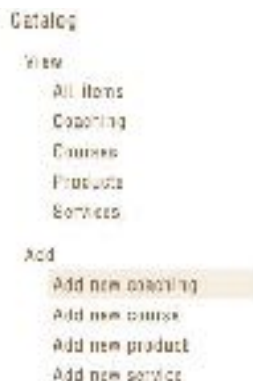
CONDUCT AND ADMINISTER YOUR COACHING EASILY

Your dashboard allows you to administer all aspects of your coaching, as well as create a rich and powerful coaching experience for your clients.

- Make appointments with your clients and schedule your regular coaching times together.
- Welcome your clients to coaching with your welcome package.
- Automatically send out and receive Coaching plans.
- Use a wide range of coaching tools including homework, journaling, goal-tracking, assessments, resources and feedback surveys.
- Offer online and group coaching.

Learn about all these aspects of coaching in the Coaching tutorial.

www.lifecoachhub.com

B) CREATE A COURSE

As well as coaching, you can offer self-contained courses. These are a great way to deliver group coaching at a lower price point and reach more clients. Courses are also perfect for delivering targeted training in your areas of expertise. Courses appeal to a wide variety of people and can be a good way of interesting people in an ongoing coaching relationship with you.

After purchasing your course, clients will gain access to their personal dashboard where they can interact wtih you and your course content. List courses that you would like to offer, such as "Getting the most from your relationships." You will be able to upload the actual course content later from the Coaching and course management menu in your dashboard.

CREATE A COURSE NOW

INSTRUCTIONS FOR CREATING A COURSE

List your courses now or skip this step and do it later from the Catalog link under the Billing & Shop drop-down in your dashboard menu bar. Select the link "Add new coaching" from the left hand menu.

OFFER GROUP COACHING, COURSES, INFORMATION PRODUCTS AND TRAINING

Your dashboard allows you the flexibility to create and offer a range of group coaching experiences for sale.

- Offer group coaching to appeal to more people.
- Create courses with automatically delivered modules in a range of areas.
- Earn a passive income stream with information products.
- Offer coach training or other forms of training.

Learn about offering courses in the Course tutorial.

C) LIST YOUR PRODUCTS

Offer complementary digital products to help people get more out of life, such as e-books or audio recordings. After purchasing your digital product, clients will be able to automatically download it. List products that you would like to offer, such as "Weight loss hypnosis.mp3." You can edit this information at any time from your dashboard.

CREATE A PRODUCT NOW

INSTRUCTIONS FOR CREATING A PRODUCT

List your products now or skip this step and do it later from the Catalog link under the Billing & Shop drop-down in your dashboard menu bar. Select the link "Add new coaching" from the left hand menu.

CREATE AND SELL DIGITAL PRODUCTS

You can sell anything that doesn't require shipping. So feel free to upload mp3 recordings, e-books, and so on. These will help you earn a passive income while at the same time introducing clients to what you have to offer. Customers will be able to quickly and conveniently download your products from our secure servers, so all you have to do is upload your file. You can even upload multiple files and we will bundle these for you, if you want to sell a package.

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D) LIST YOUR SERVICES

Offer other services to help people get more out of life, such as tickets to events or workshops, or speaking fees. List services that you would like to offer, such as "Breaking through to your dreams workshop" or "One hour speaking fee." You can edit this information at any time from your dashboard.

[CREATE A SERVICE NOW](#)

INSTRUCTIONS FOR CREATING A SERVICE LISTING

List your services now or skip this step and do it later from the Catalog link under the Billing & Shop drop-down in your dashboard menu bar. Select the link "Add new coaching" from the left hand menu.

SELL SERVICES

Offer for sale tickets to live events and workshops, list your speaking fee, or offer any other service. As confirmation of the service, upload tickets, a brochure, or even a simple message. Your customers will be able to download this information from our servers once they have purchased your service.

STEP 4: SET UP YOUR ACCOUNT TO RECEIVE PAYMENT

To receive payment for your coaching, courses, products and services, you will need a PayPal account with the same email address as your Life Coach Hub account. You also need to fill in your business address as this will appear at the top of your client invoices.

After completing these two simple steps, your catalog items will be available for purchase, and income from sales of your coaching, courses, products and services will be automatically transferred into your account.

Your coaching, courses, products and services will not be listed or be available for sale until you complete this information, so that we can be sure you get paid immediately for your work.

You can set up this information now, or input it later from the Settings link under the Profile & Settings drop-down.

SET UP YOUR ACCOUNT TO RECEIVE PAYMENT

INTRUCTIONS FOR SETTING UP YOUR ACCOUNT TO RECEIVE PAYMENT

To set up your account to receive payment, all you need to do is follow two simple steps on the Payment Settings page. To access the Payment Settings page, select the Settings link from the Profile & Settings drop-down. Then click on the Payment Settings tab.

Inputting your Business Information

The top box on the page will allow you to enter your business information. Just click the Edit link, and then enter your business address. If you have a company name, you can also enter this here.

Inputting your PayPal account details

Next, you need to enter your PayPal details. Choose one of the two options offered under the heading "Receive Payment."

1. If your PayPal account matches the email associated with your Life Coach Hub account, choose option 1. Then click the Activate button. Once you do so, you're set to go! Payment from sales of your coaching, courses, products and services will be transferred directly to your PayPal account.

2. If your PayPal account does not match the email associated with your Life Coach Hub account, choose option 2.

    a. Fill out your first name, last name and email EXACTLY as they appear on your PayPal account.

    b. Re-enter your Life Coach Hub password.

    c. Then click the Activate button. Once you do so, you're set to go! Payment from sales of your coaching, courses, products and services will be transferred directly to your PayPal account.

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IMPORTANT NOTE: If you have a PayPal account from outside of the United States, make sure your account is set up to receive payments in US Dollars. This is because all payments from Life Coach Hub will be made to you in US Dollars and if your account is set to block foreign currency, it is possible payments will not be input into your account. You will need to login to your PayPal account and click on the "Profile" link. Then click on "Payments Receiving Preferences." Set the first option for "Block payments sent to me in a currency I do not hold" to "No" and save.
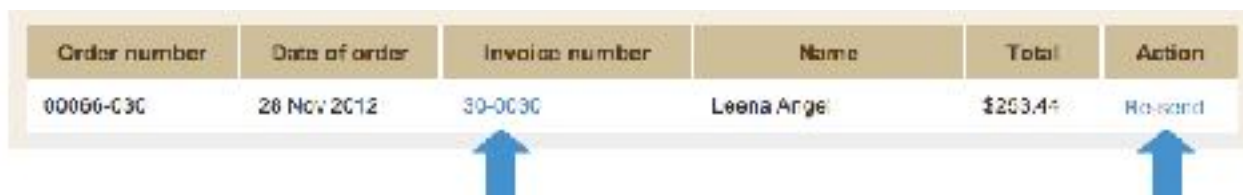
HOW ARE MY INVOICES SENT?

Invoices are sent automatically when a customer or client orders anything from your shop. This includes invoices for any coaching.

You can view, download, print or resend your invoices by accessing Invoices from the Billing & Shop drop-down menu. Select View/resend invoices from the left hand menu under Client invoices.
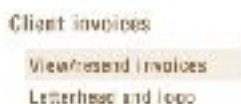
Click on any invoice number to view it. Or click on the re-send link to send another copy of the invoice to your client (they will already have received one automatically upon purchase).

Order number	Date of order	Invoice number	Name	Total	Action
00066-C3C	28 Nov 2012	30-0C3C	Leena Ange	$253.44	Re-send

STEP 5 : START GETTING NEW CLIENTS

HOW DO I GET MORE NEW CLIENTS?

Set yourself up to start getting more new clients.

1. Make sure you create an amazing profile with a stand-out photograph.

2. Start to schedule your appointments using the intuitive Life Coach Hub system, so that your coaching hours appear on your profile, in the directory, and push you to the front of client searches. Each client can also give you a recommendation, hugely valuable in potential clients' eyes.

3. Ask your past and current clients to leave reviews for you.

4. Get your name out there and position yourself as an expert by submitting articles, tips, and videos and sharing these on social media.

1. CREATE AN AMAZING PROFILE

The secret to getting clients online is to write a profile that stands out.

a) Make it original

If you have your profile listed in other directories, make sure that the one you write for your Life Coach Hub profile is unique. This will help you stand out in searches, greatly increasing your chances of being found.

b) Make it compelling

Make your profile rich, compelling and true to your own voice.

c) Upload a professional high quality photo

An image is worth a thousand words. It is 100% worth it to invest in a high quality studio photograph for your profile picture. A snapshot just won't cut it in the eyes of clients. Make sure your image shows you looking professional and at your best. **Coaches with professional photos get 40% more inquiries.**

2. SCHEDULE YOUR APPOINTMENTS USING OUR ONLINE COACHING SYSTEM

Verified coaching hours are the **key to getting new clients.**

Every time you schedule with a client through our online coaching system, whether it's for private coaching, online coaching, or the courses you run, your coaching hours add up. Your coaching hours will show up on your profile, in the general directory, and the niche directory pages. It is also a very common search filter applied by clients when sorting through coaches.

Coaches with verified coaching hours get 60% more inquiries.

a) Add your clients

Just login and send an invitation to your current clients from your dashboard, where it says "Add your clients to start coaching together using your online coaching platform!".

- If you want your clients to pay, choose the first option from the drop down "Who do you want to invite?", and they'll be given an invitation to buy one of your coaching offerings.

- If you don't want them to pay, choose the second option and they'll get a link that will automatically register them for one of your coaching offerings.

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b) Start scheduling your appointments

Then start scheduling your appointments! Schedule single or multiple appointments from the [Appointments tab](#) in your Calendar. This will automatically populate you and your client's Private Coaching pages, and send out your coaching plans and follow ups automatically.

After your appointments take place, you'll see your coaching hours start racking up, and **you'll get a lot more attention on your profile.**

And of course you will be able to keep track of client notes, automatically send coaching plans, and use other [coaching tools](#) with each client you make an appointment with.

Any current client can also offer you a recommendation, which also looks fantastic on your profile, and is another way potential clients can filter coaches to find the best.

3. ASK YOUR PAST AND CURRENT CLIENTS TO LEAVE YOU REVIEWS

Prospective clients love to hear what other people have to say about you and what they have achieved by coaching with you. This helps them connect with you and feel you can help them with similar issues in their own lives.

Just give your current and past clients your profile URL and ask them to leave you a review. It will only take a minute, and will seriously boost your profile, helping you attract new clients.

Nowadays people are very used to leaving reviews online for services they recommend, so don't be shy. They don't have to sign up, so it's a quick and easy process. Not only will potential clients be much more inclined to make contact, but your profile will show up higher in the directory the more reviews you have!

4. SUBMIT VIDEOS, ARTICLES AND TIPS TO POSITION YOURSELF AS AN EXPERT

One of the best ways to attract clients is by [submitting guest articles, videos and tips](#) to position yourself as an expert in your niche.

STEP 6: GET STARTED MANAGING YOUR COACHING

A step by step tutorial

Coaching is enjoyable and easy using your dashboard's coaching tools and features. This tutorial will guide you through the main features of the system so you can get started right away!

What this tutorial covers: Steps in your coaching journey

Here's what happens when a client starts their coaching journey with you.

A. THE WELCOME PACKAGE

Once they have purchased coaching and become your client, they will receive your welcome package and agreement and fill in their personal information form and coaching information form. The coaching information form allows you to get an overview of the areas of strength and challenge for your client, to allow you to focus your coaching. You 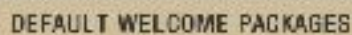can customize both personal and coaching information forms. After your client submits the forms from their welcome package, you will be able to access their personal and coaching information at any time for easy reference from the Client Portrait tab of Client Management.

B. MAKING APPOINTMENTS

To make appointments with your clients, just create a new appointment from your Calendar. You can make either one-off or repeating appointments. You can also change times later if they don't suit you. Either you or your client can cancel an appointment. Both you and client will be alerted to your upcoming appointments, and any changes or cancellations.

C. COACHING PLANS

Your client will submit a coaching plan before each of your sessions together and a follow-up after. These allow you to keep your coaching targeted and on track. You can add comments, and your client can comment in response. Before your session you can take notes to prepare yourself and remind yourself of your client's focus and goals. During your session you can take notes and assign coaching tools. You can also send a session summary to your client with the click of a button.

D. GETTING TO KNOW AND USE COACHING TOOLS

You can make use of a range of coaching tools to help your clients reach success faster and get more from the coaching process. Try assigning journal topics, homework, goals, assessments and resources. Each coaching tool allows you to motivate, focus and progress your clients more efficiently and effectively. Monitor your coaching by creating customized feedback surveys, helping you keep your coaching right on track.

E. ONLINE COACHING

It's easy to engage in online coaching using the dashboard tools.

F. GROUP COACHING

You can add group coaching to your repertoire to expand your client base and service offerings.

Coaching management on your dashboard

The Client and Coaching Management link in your dashboard is where you will go to administer your coaching (under the Manage Clients & Courses drop down menu). When you click the link, you will see all your clients listed on the left hand side of the screen. Clicking on a client name will expand the list so you can administer their settings, make appointments, and assign coaching tools such as goals and journaling.

If you don't see any clients listed here yet, all you need to do is add your current clients! Click "Add new client" on the left hand menu of this page, or use the link on the Welcome page of your dashboard. In the meantime, you can easily create and manage coaching tools from the Coaching and Course Tools link in the Coaching & Course drop down menu.

A. THE WELCOME PACKAGE

WHAT IS A WELCOME PACKAGE?

Welcome your clients to coaching with your welcome package, which will be sent out automatically after a client purchases coaching with you. Your welcome package will contain a welcome letter, a personal information form, a coaching information form and a coaching agreement. You can also add any of your other assessments or resources. You can customize your welcome package however you'd like.

The coaching information form allows you to get an overview of the areas of strength and challenge for your client, to let you focus your coaching. You can customize both personal and coaching information forms.

HOW DO I USE AND CUSTOMIZE MY WELCOME PACKAGE?

It's easy to edit any part of your welcome package. Just access Coaching and Course Tools, located under the Manage Clients & Coaching drop-down in your dashboard menu. Then choose Welcome Package Forms from the left hand menu.
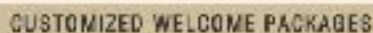
Customizing your welcome package

1. You can edit your welcome package in two ways.

    a. You can edit the default welcome package. This is the package that is sent out by default if you haven't specified anything else to take place.

    b. Alternatively you can change the welcome package for specific offerings, for instance by customizing the welcome letter or including different questions on the coaching information form. Click on the offering name in the area called Customized Welcome Packages at the bottom of the page, and the list of items in your welcome package will drop down.

2. To customize the welcome package, click on the item you wish to edit. The current version will drop down. Click Edit to edit the item.

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- The welcome letter and coaching agreement will reveal a WYSIWYG box where you can add formatting to your letter and change the text.

WELCOME LETTER   ◦ View / edit letter
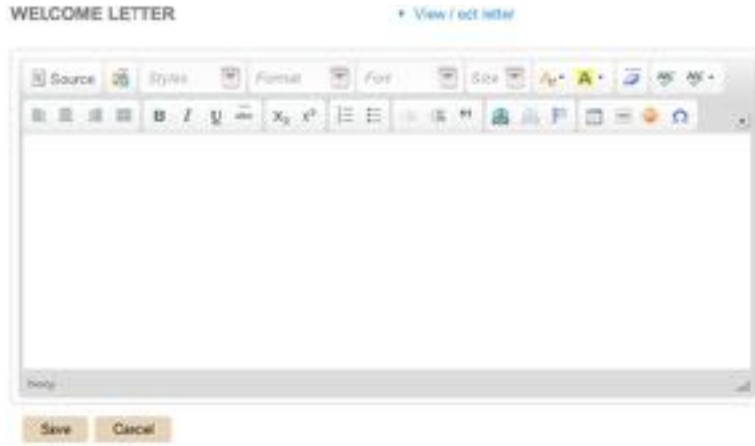
COACHING AGREEMENT   ◦ View / edit agreement

- The personal information form and coaching information form will reveal a list of questions and question types. By clicking Edit you can change the question and/or select a new question type. To **delete the question,** just erase all the text in the text box. You can also add additional questions.

PERSONAL INFORMATION FORM   ◦ View / edit form

Edit

1. Home phone   Short answer
2. Work phone   Short answer
3. Cell/ mobile phone   Short answer
4. Skype name   Short answer
5. Street Address   Short answer

- To add additional forms or resources, click the drop-down menu, next to Additional Form or Resource. Check the boxes of all items you want included. You can create additional assessments and resources from the Assessments and Resources page in Coaching and Course Tools.

ADDITIONAL FORM OR RESOURCE   -- Select --

You can create new forms and resources in Assessments and resources.

Viewing completed forms from your welcome package

1. The information your client submits on the personal information form and coaching information form will be visible from the client's Portrait page in Coaching management. Click on your client's name to expand the drop-down menu and then select Client portrait.

- Active clients
  - Emma Watson
    - Client settings
    - Client portrait

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2. Your client's personal information will appear on the tab marked Personal information. If this information changes during your coaching relationship (for instance if they move or change their number), you can easily edit the information by clicking Edit details.

PERSONAL INFORMATION   COACHING INFORMATION

3. Your client's coaching information will appear on the tab marked Coaching information.

PERSONAL INFORMATION   COACHING INFORMATION
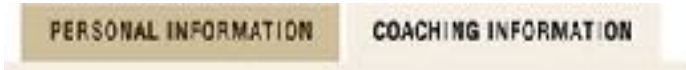
4. Answers to any other assessments will be visible to you in the Assessments and Resources page of Coaching Management for that client.

COACHING & COURSES   EXPERT CONT

COACHING MANAGEMENT
COURSE MANAGEMENT
COACHING AND COURSE TOOLS

Homework and tasks

Assessments and resources

Feedback

B. MAKING APPOINTMENTS

MAKING AN APPOINTMENT

Your online coaching platform allows you easy and intuitive scheduling of all your coaching appointments and alerts. You can add either one-off or recurring appointments. You can add a new appointment from either the View Calendar tab or the Appointments tab in the Calendar.

Making an appointment

1. On the View Calendar page, press New Appointment. On the Appointments tab, press Make an Appointment. A window will pop open.

2. Choose the client you want to make the appointment with from drop-down list.

3. Choose the starting time, finishing time and date from the list.

4. Choose whether this is a single appointment or if it will occur repeatedly (every day, every week, every two weeks, once a month or every two months). If it repeats, then select the ending date.
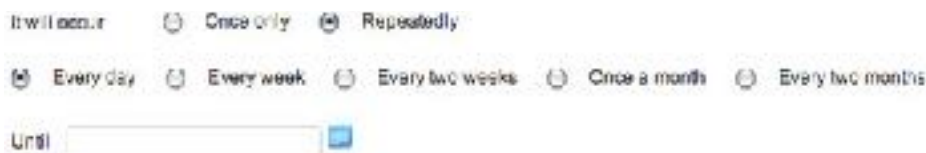
Where your appointments will show up after you schedule them

1. You can see your appointments on two pages of your Calender. On the View Calendar page, all appointments will be listed (select Day, Week or Month view). They will also be listed on the Appointments page. From here, it's easy to Change or Cancel any appointment.

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Date	Time	Duration	Client	Action
17 Sep 2012	9:00 AM	60 minutes	Alexandra Livinia	Change | Cancel Review plan | Email
24 Sep 2012	9:00 AM	60 minutes	Alexandra Livinia	Change | Cancel Review plan | Email

2. In the Appointments and Coaching Progess page of Coaching Management, your scheduled coaching day and time will populate the list of appointments. You can check here to view your client's Coaching Plans when they are complete, plan your sessions and send session notes.

Date	Time	Duration	Status	Action
20 May 2012 ▸ Coaching plan and follow-up	1:00 PM	30 mins	Plan completed on 20 May 2012 Follow-up completed on 20 May 2012	
30 May 2012 ▸ Coaching plan and follow-up	1:00 PM	30 mins	Plan completed on 28 May 2012 Follow-up not completed yet	

3. From their Coaching Pad, your client will see their upcoming sessions in a number of places.

   a. Your client will be alerted to their next appointment in the top section of their Coaching Pad. They will also receive an email alert.

   b. Your client will be able to see a list of their coaching sessions and the status of their Coaching plans in the Coaching Appointments tab of their Coaching Pad.

   c.

d. Also in this tab, your client will be able to view and post their Coaching plans, take notes and create action items, by selecting the relevant appointment date from the drop-down menu.
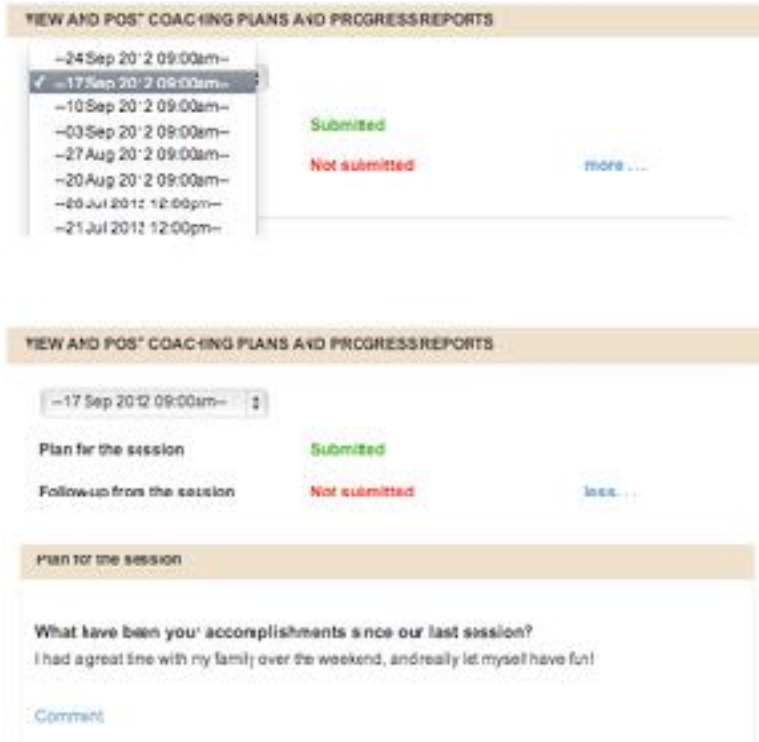
CHANGING OR CANCELING AN APPOINTMENT

You can change or cancel any appointment.

Changing an appointment

1. On the Appointments tab, click Change next to the appointment you would like to change.
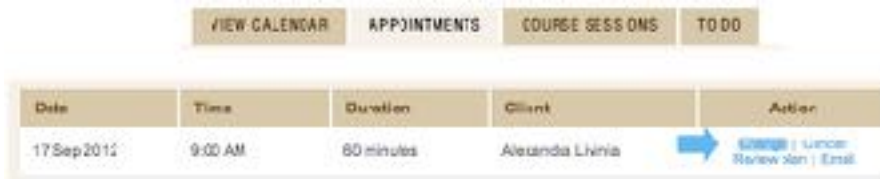
2. Select the new start time, end time and/or date.

Cancelling an appointment

1. On the Appointments tab, click Cancel next to the appointment you would like to cancel.

2. Confirm the cancellation.

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SETTING ASIDE AVAILABLE BLOCKS OF TIME

Available blocks of time are times that you have set aside when you are free to see clients, even if these times have not been booked with appointments. There are two reasons to set aside available blocks of time. First, prospective clients can book a free initial consultation with you during these times, which is a great way to get new clients. Secondly, your clients can change an appointment if the time not longer suits them, and move it to one of your available times.

1. At the top of the View Calendar tab, click the button "Available block of time"

2. Choose the start time, finish time and date from the list.

3. Choose whether this block of available time is a single occurrence or if it will occur repeatedly (every day, every week, every two weeks, once a month or every two months). If it repeats, then select the ending date.

C. COACHING PLANS

WHY SHOULD I USE COACHING PLANS WITH MY CLIENTS?

When you're coaching your clients, you want to set goals, keep your client focused, demonstrate the power of coaching, and track progress. Using coaching plans with your clients help you to do all of these things.

1. The Coaching Plan. By completing a coaching plan before a session, your client will be able to talk about their accomplishments and challenges since your last appointment together, and their priorities for the coming session. This lets you focus in very directly during your coaching session on the areas that need work, letting you keep your coaching sharp and to the point. Coaching plans are the best tool for keeping your coaching sessions on track, keeping the big picture in mind, and keeping your clients motivated and moving toward their goals.

2. The Follow-up. After your session together, by completing a Follow-up, your client will be able to commit in writing to the goals and action items you have discussed together. This keeps them on track and motivated to succeed. Pair your client's Follow-up with goals, homework assignments, and journaling that you assign for the client to follow through on these commitments. In their follow-up, clients can also ask any questions they may have that weren't addressed, and give you valuable feedback about the session. You can also ask your client to reflect on their greatest insight from your session. This allows them to continually see the power of coaching in their lives.

You can comment on any of your client's responses to both the plan and follow-up to keep coaching alive, interactive and dynamic.

For online coaching, the process is similar. Your online coaching clients will submit Coaching Progress Reports at agreed upon intervals, answering the same types of focusing questions. Since there are no coaching calls in between reports, Coaching plasn are even more central to your coaching together. You can comment on your client's answers and they can comment back, allowing for a deep online interactive presence in their lives. Gear the assignment of your other coaching tools to your client's answers.

Rather than depending on the cumbersome process of email, the Coaching management area of your dashboard and your client's Coaching Pad will make the process of submitting, reading and commenting on their Coaching plans flow seamlessly. You can of course customize the coaching plan your clients will receive on their dashboard in any way you want, according to your own coaching preferences.

HOW DO I USE COACHING PLANS WITH MY CLIENTS?

Using Coaching Plans for Private coaching

1. Click on your client's name under Coaching management to reveal the drop-down list. Click on Private, under Appointments and coaching progress.

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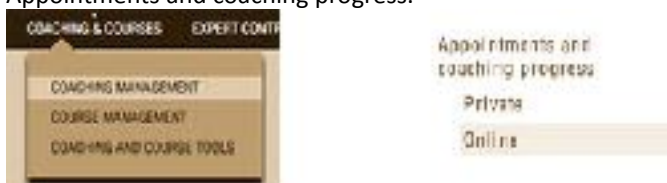
2. The list of your appointments with your client will show up, based on the appointments you have made together. If you don't have any appointments yet, click the button "Make an appointment."

3. The status column will display whether or not the Coaching plan and Follow-up have been completed by your client.

4. Click on the link "Coaching plan and follow-up." It will drop down to reveal the following:

   o The Plan for the upcoming session. This shows the questions from your coaching plan, and your client's answers. You can comment on any answer and receive comments back from your client. Just click the Comment link

   o Underneath the Coaching plan is an area called My Plan and Private Notes from the Session, which we discuss below.

   o At the bottom is the Follow-up from the session. This shows the questions from your Coaching plan Follow-up and your client's answers. Again, you can comment on any answer, and your client can comment back.

Using Coaching Plans for Online coaching

1. Click on your client's name under Coaching management to reveal the drop-down list. Click on Online, under Appointments and coaching progress.

2. The list of your online sessions with your client will show up, based on your regularly scheduled coaching progress report dates. The way online coaching works is that rather than having live sessions (either over the phone or in

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person), your client will have specific times for reporting about their progress. You can then coach them online by responding directly to their coaching progress report, as well as assigning other coaching tools.

Offering name	Date progress due	Status
Salmon's online coaching ▸ Client progress	01 Jun 2012	Plan not completed yet
Salmon's online coaching ▸ Client progress	04 Jun 2012	Plan not completed yet

Click "Edit progress report days" to change the regular days your client should be reporting on their coaching progress.

PRIVATE COACHING	ONLINE COACHING
Edit progress report days	Edit coaching plan

3. The status column will indicate whether or not the Coaching progress report has been completed by your client.

4. Click on the link Client progress. It will drop down to reveal the folowing:

    o   The Plan for this progress period. This shows the questions from your Coaching progress report plan, and your client's answers. You can comment on any answer and receive comments back from your client. Just click the Comments link

Offering name	Date progress due	Status
Andrea's stress management coaching online ▾ Client progress	19 Sep 2012	Plan completed on 19 Sep 2012

PLAN FOR THIS PROGRESS PERIOD

What have been your accomplishments this progress period?

I got a lot done around the house. More importantly, I think, I started to apply the lessons I've learned from our work together on "being in the moment." I think it's starting to become more of a habit!

Comment

What have been your challenges this progress period?

I got really frustrated with a telemarketer. I know they're just doing their job. I just get so wound up. I have to work on this.

Comment

    o   Underneath the Coaching progress report is an area called Private notes. This is where you can take notes about this progress period, which will be saved for your future reference

PRIVATE NOTES

HOW DO I USE COACHING NOTES WITH MY CLIENTS?

Most coaches like to take notes before, during and after their coaching to keep their clients on track, and to keep themselves focussed. Your system allows you to do this effortlessly. Having online records of your coaching also allows you to search easily through your notes at any time to remember key moments in your client's coaching journey.

My Plan and Private Notes from the Session

Under your client's Preparation for the Upcoming Session, you'll see a section called My Plan and Private Notes from the Session. This is divided into three sections:

1. **Preparation for our session.** In this section you can write your client's current focus, goals and possible obstacles they may encounter. Doing so you'll be able to refresh your memory and stay on top of your client's progress.

2. **Session.** Here you can take your own private notes during the session, and take note of any action items the client has committed to.

3. **Take aways.** You can jot down here your client's key insights from the session, You can also make a plan for any coaching tools you'd like to assign or plan the next session.

Prefill function

To make it easier for you and cut down on your typing, we've created a feature where, for every session after the first, you can choose to prefill all fields with your notes from the previous session. You can of course edit these freely, but this could save you from tedious cut and pasting, or having two browser windows open while you review last session's notes.

Just click the button "Prefill" at the top of the section.

Post Session Summary and Coaching Tools For Client

We have made it super easy to assign tools and send a session summary to your clients.

- **Assign coaching tools.** To assign a coaching tool, such as journaling, action items, goals or an assessment, just click the drop-down menu under Assign coaching tools, and choose as many tools as you would like to assign. The list of assigned tools will appear underneath.

- **Create a new tool to assign.** To create a new tool to assign, select the type of tool you'd like from the drop down menu. You'll be taken to the page in a new tab to create your tool. You can assign it from that page, or return to the Appointments and Coaching Notes page.

- **Send a summary of your session.** To send a summary of your session, type your notes in the empty box and then click the button "Send to my client."

HOW DO I CUSTOMIZE MY COACHING PLANS?

You can easily customize the Coaching plan for both your Private and Online coaching.

1. Click on Coaching and Course Tools under the Coaching & Courses drop-down on your dashboard menu. Select Coaching plans from the left hand menu.

2. Click View/edit Coaching plan next to Private Coaching or Online Coaching. Then click Edit. You can change any questions by changing to text. To delete a question, just erase the text. Press Add additional question to insert another question. Press Save coaching plan to Save.

PRIVATE COACHING PLAN ▸ View / edit plan

ONLINE COACHING PLAN ▸ View / edit plan

PRIVATE COACHING PLAN • View / edit plan

Plan for the upcoming session   Edit

What have been your accomplishments since our last session?

What have been your challenges since our last session?

What would you like to focus on at our next session?

Follow-up from the session

What are your goals until our next session?

What are your action items until our next session?

What has been your greatest insight from our session?

Do you have any questions after our session?

Do you have any feedback about the session?

PRIVATE COACHING PLAN • View / edit plan

Plan for the upcoming session

What have been your accomplishments since our last session?

What have been your challenges since our last session?

What would you like to focus on at our next session?

Add additional question

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D. GETTING TO KNOW AND USE COACHING TOOLS

WHAT KIND OF COACHING TOOLS ARE AVAILABLE FOR ME TO USE?

The best part about your coaching software is the wide variety of tools and forms that you can use in your coaching practice. These help you to be more effective in your coaching, and allow you to stay more organized as your practice grows. You and your coaching business have access to the following great coaching tools:

i. JOURNALING. Journaling allows you to assign thought-provoking topics for your clients to write about. Journaling has been shown to be effective in a number of regards, including providing focus, improving health, and reaching goals more quickly. You can assign journal topics, see how your client responds, and leave comments.

ii. GOAL-TRACKING. Help your clients reach their goals faster. Chart and measure their progress toward success using the goals tool. Your client can give you regular progress reports towards their goals, and read your comments, keeping them motivated and on track.

iii. ACTION ITEMS. Ask your client to take action by assigning specific, measurable tasks. Relate these to the coaching work you are doing together. Your clients will report on their progress, creating entries you can view and comment on.

iv. ASSESSMENTS AND FORMS. Create your own assessments and forms to gather information about where your clients are and where they would like to be. Assessments take a reading of the current terrain—where your clients are at right now. They also allow you to plot a clear plan of action in your coaching to see where your clients want to be and how you can help them get there.

v. RESOURCES. You may have additional information you want to pass onto your clients. You can do this easily from your dashboard. Collect and keep track of the extra resources you send out regularly in one easy location. You can upload any kind of document, and you can even create resources yourself from scratch. Then just assign them to the clients you want, when the time is right.

vi. FEEDBACK SURVEYS. Gather immediate feedback on what is working and what needs improvement in your coaching so you can adjust accordingly, and keep your client on the path to success. You can tailor individual surveys on all the criteria that are important to you, and re-use these multiple times.

i. JOURNALING

WHY USE JOURNALING IN MY COACHING?

Journaling allows you to assign thought-provoking topics for your clients to write about. Journaling has been shown to be effective in a number of regards, including providing focus, improving health, and reaching goals more quickly.

HOW DO I USE JOURNALING?

It's easy to pass the benefits of journaling on to your clients in a way that is easy for you to administer and respond to. To use journaling with your clients, all you need to do is create a journal topic and assign it to your client. Your client will be able to post entries that are private or share them with you. You will be able to comment on any entries. Your client can have as many journal topics going at one time as you like, and continue to write on them for as long as they choose.

Creating Journal topics

1. You can create journal topics in one of two ways

    a. If you already have coaching clients registered, you can go directly to Client and Coaching Management (under Manage Clients & Coaching in your dashboard drop-down menu). Here you will see a list of your Active clients, Inactive clients and Prospects. Clicking on any name will drop down a range of tools, including Journal.

    Click on Journal topics. From this window, you can create and assign journal topics.

    b. Or you can create journal topics from Coaching and Course Tools (also located under Coaching and Courses). Just click on Journal topics in the left hand panel.

2. No matter which page you choose, there will be a button in the main box saying "Add journal topic." Click this button and an area will drop down where you can create your journal topic.

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Choose a title and write a description. This is what your client will see when responding to the journal, so explain clearly what you would like the client to accomplish with this topic. You can also choose to group your journal topics into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

3. All your journal topics created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing Journal topics

1. You can edit your journal topics by clicking the link View/edit journal topic then selecting Edit. After making your changes, you have two options. If you select Edit all instances of topic, then everywhere you have already assigned the topic, the changes will show up (so use this with caution as it may be confusing if the changes are not minor). If you choose Save a new version of the topic, your edits will create a new version of the topic.

Assigning Journal topics

1. You can assign a journal topic from the Coaching Management page. Just click on the client's name you want to assign the topic to from the list of your clients on the left-hand side of the page, and then select Journal topics from the drop-down menu.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your journal topic.

You can also assign journal topics (and any other tools) from the Appointments and Coaching Notes page, under the entry for that appointment. You can do this during your coaching sessions to really streamline the process, and keep you on top of your client's progress.

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What does my client see from their dashboard?

1. Your client will be able to read your journal topic and create entries from the Coaching Pad in their dashboard. They can choose which privacy setting and whether to allow comments. If they choose "Only me" as the privacy setting, you will be able to see they wrote and entry but not read it.

How do I read and respond to client journals?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

Click comment below any journal entry to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

OR

2. You can also read your client's journal entries from the Client Journal tab under Journal in Coaching Management.

3. To comment, just click the Comment link. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).
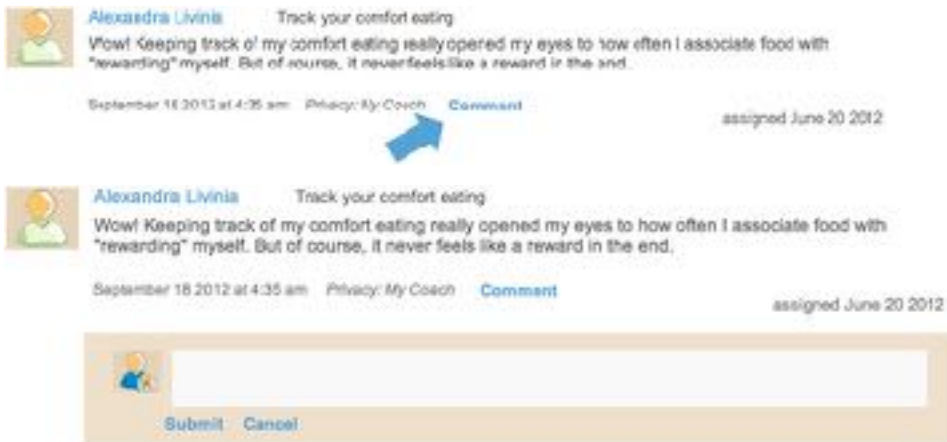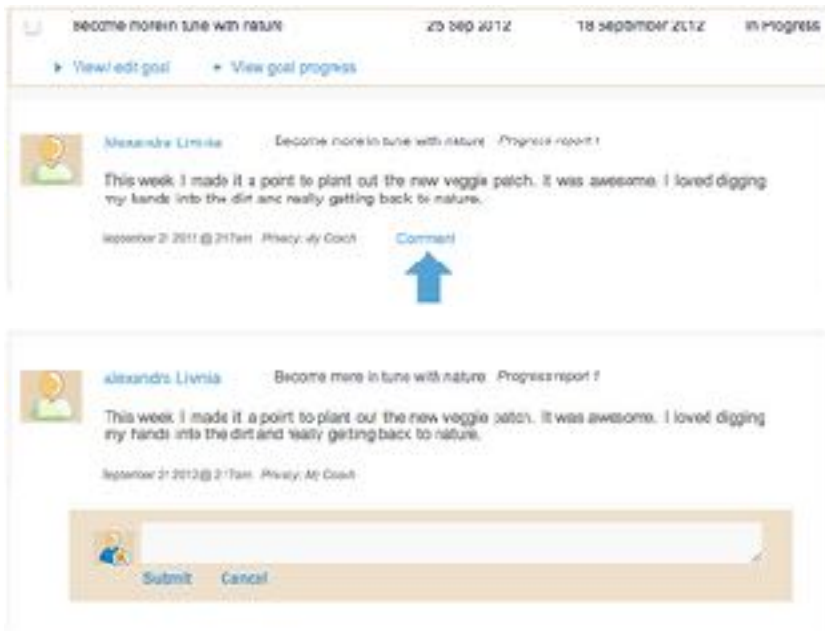
ii. GOALS

WHY USE GOALS IN MY COACHING?

Coaching is all about helping your clients close the gap between where they are and where they want to be. Setting goals and charting progress toward these goals is crucial in order to help your clients know what they want, to create the motivation to achieve their aims, and to create a clear, actionable path to get there.

HOW DO I USE GOALS?

Goal tracking is easy and enjoyable. Either you or your client can set goals. If you want to set a goal, all you need to do is create a goal and assign it to your client . Your client will be able to post reports about their progress towards their goals (either private or shared). You will be able to comment on any entries. Your client can have as many goals going at one time as you like, and continue to work towards them for as long as they choose. You can set milestones, a target date and a reward if you like.

Creating Goals

1. Once you have a coaching client registered, access Client and Coaching Management (under Manage Clients & Coaching from the drop-down menu). Here you will see a list of your Active clients, Inactive clients and Prospects. Clicking on any name will drop down a range of tools, including Goals. From this window, you can create and assign goals.

2. Click on the button at the top that says "Create a goal." An area will drop down where you can create your new goal for this client.

Choose a title and write a description.

You can provide a target date if you want, or choose to make this an Ongoing goal. You can also add a reward that you encourage your client to enjoy when they complete their goal.

If the goal is fairly large, you might want to provide milestones along the way with optional target dates for these as well. These should be arranged in chronological order leading up to the goal target date. You can add as many milestones as you like—simply click Add additional milestone.

Editing Goals

You can edit your goals by clicking the link View/edit goal then selecting Edit. After making your changes, click Save.

Assigning Goals

Goals are specific to your individual client, so they won't show up in any of your other coaching or courses. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your goal.
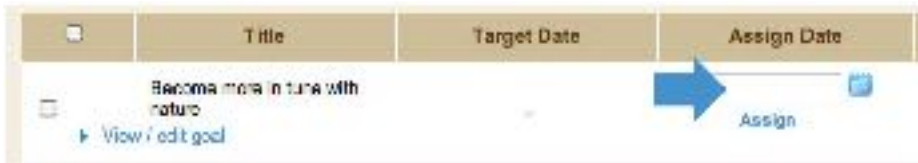
You can also assign goals (and any other tools) from the Appointments and Coaching Notes page, under the entry for that appointment. You can do this during your coaching sessions to really streamline the process, and keep you on top of your client's progress.

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What does my client see from their dashboard?

1. Your client will be able to read your goal and create progress reports from the Coaching Pad in their dashboard. They can choose which privacy setting and whether to allow comments. If they choose "Only me" as the privacy setting, you will be able to see they wrote and entry but not read it.

2. Your client can also create their own goal. If they do so, these goals will also show up in the Goals page of your Coaching management for this client.

How do I read and respond to goal progress reports?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

   Click comment below any goal progress report to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

   OR

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2. You can also read your client's progress reports toward their goal from the same page where you created the goal (the Goals page in Coaching management).

3. Your client will update the status and add details of their progress toward their goal from their dashboard. Click "View goal progress" to review the details your client has provided about their progress, any setbacks they have encountered, and so on. When they have reached their goal, they can mark it as Achieved, which will be noted in their progress report, and change the status of the goal.

4. To comment, just click the Comment link. Clients can comment back, and this way you can have a productive exchange regarding your clients' goals, keeping them motivated and on track.

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iii. ACTION ITEMS

WHY USE ACTION ITEMS IN MY COACHING?

The key benefit of coaching is in helping clients to create new strategies, behaviors and perspectives. Asking your client to take action is critical in this process, and creating action items is the perfect way to make taking action concrete for your client. Once your client commits to taking action during your session together, either you or your client can create that action item.

Your clients will report on their progress, creating entries you can view and comment on. This creates accountability, giving clients the push they need to follow through on their commitments and take action towards reaching their goals. Action items have been shown to improve client commitment to their goals. If clients commit to a task, they will have more of an investment in their coaching outcomes.

HOW DO I USE ACTION ITEMS?

It's easy to get your clients to follow through on their action steps. All you need to do is create an action item and assign it to your client. Alternatively, your client can do so from their own Coaching Pad dashboard. Your client will be able to post reports about their homework progress (either private or shared). You will be able to comment on any entries. Your client can have as many homework assignments going at one time as you like, and continue to work towards them for as long as they choose.

Creating Action Items

Go to Client and Coaching Management (under Manage Clients & Coaching from the drop-down menu). Here you will see a list of your Active clients, Inactive clients and Prospects. Clicking on any name will drop down a range of tools, including Action Items.

Click on Action items. From this window, you can create and assign action items.

There will be a button in the main box saying "Create action item." Click this button and an area will drop down where you can create your action item.

Choose a title and write a description. This is what your client will see when responding, so explain clearly what you would like the client to get from completing the action item. You can also choose to group your action items into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

Similar to goals, action items are unique to each client, so you'll only see the action items for that client on their Action Item tab.

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Editing Action Items

You can edit your action items by clicking the link View/edit action item then selecting Edit.
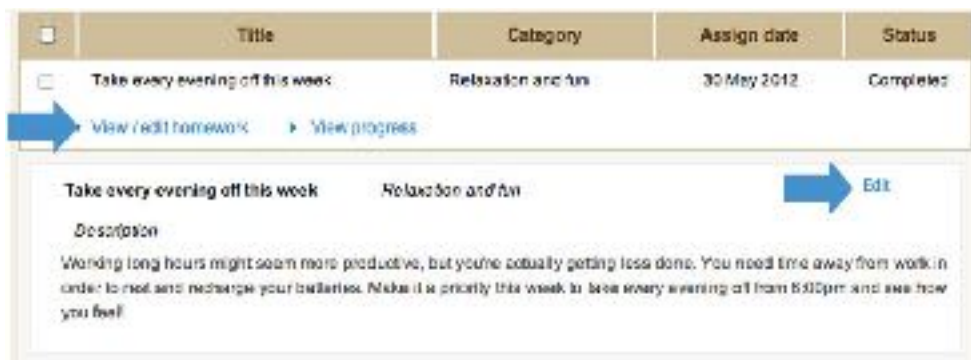
Assigning Action Items

1. You can assign action items from the Client and Coaching Management page. Just click on the client's name you want to assign the action item to from the list of your clients on the left-hand side of the page, and then select Action items.
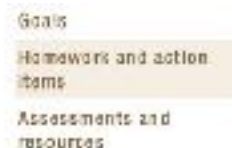
2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your assignment.

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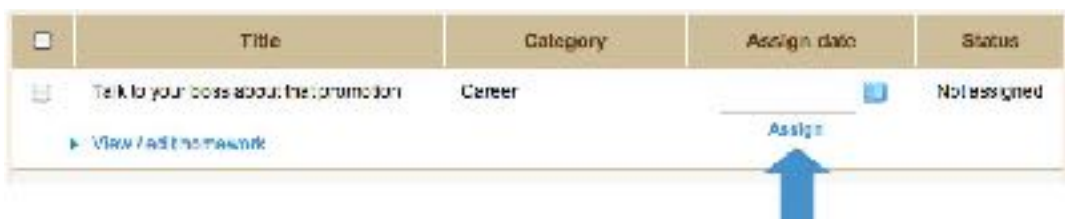
What does my client see from their dashboard?

Your client will be able to create action items, and respond with progress entries from the Coaching Pad in their dashboard. They can choose which privacy setting and whether to allow comments. If they choose "Only me" as the privacy setting, you will be able to see they wrote and entry but not read it.

How do I read and respond to progress reports?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

    Click comment below any progress report to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

    OR

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2. You can also read your client's progress toward their action item from the Action items page in Client and Coaching management).

3. Your client will update the status and add details of their progress toward their action item from their dashboard. Click "View progress" to review the details your client has provided about their progress, any setbacks they have encountered, and so on. When they have completed their action item, they can mark it as Achieved, which will be noted in their progress report, and change the status of the action item.

4. To comment, just click the Comment link. Clients can comment back, and this way you can have a productive exchange regarding your clients' action plans, keeping them motivated and on track.

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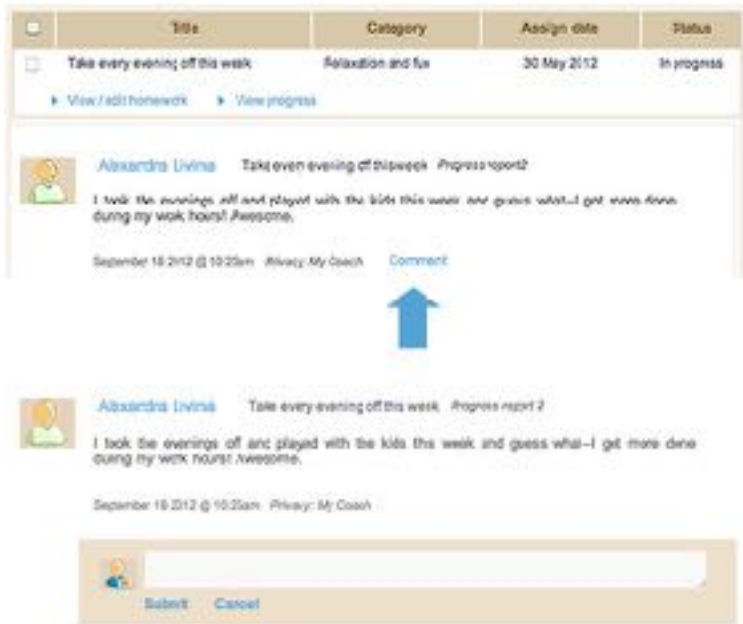
iv. ASSESSMENTS AND FORMS

WHY USE ASSESSMENTS IN MY COACHING?

Gather information about where your clients are and where they would like to be. Assessments take a reading of the current terrain—where your clients are at right now. They also allow you to plot a clear plan of action in your coaching to see where your clients want to be and how you can help them get there.

You should use forms and assessments throughout your entire coaching relationship. When first getting to know a client, assessments can be used to plot out a variety of areas, such as a client's values, their goals for the next six months or their personal mission statement. You can use these to guide your coaching work together.

Along your coaching path, you should continue to administer assessments, targeted towards particular action items. For instance, if your client is struggling with finding a balance between work and life, you might want to set a Value clarification assessment to help them figure out where their values lie and if they are aligned with their current lifestyle. If a client is struggling with stress from having too much to do, you could create a Priorities and Time management assessment which charts where they spend the majority of their time, and whether it is aligned with their values and priorities.

In essence, the possibilities are endless. Assessments help you and your client pinpoint obstacles, challenges and opportunities in your client's path towards achieving their goals. Coaching assessments are so valuable because they allow your client to assess themselves, measure their own progress, and thus become a better partner towards their own success.

Even better, you receive the responses directly in your dashboard. You can easily comment on the assessment to further your client's coaching work. You also have a permanent electronic archive for easy accessibility, letting you track your client's changing values and priorities easily.

HOW DO I USE ASSESSMENTS?

You can easily create your own personalized assessements and forms which you can assign to clients . Your client will be able to post answers to your assessments, and you will be able to comment on their responses.

Creating Assessments and Forms

1. You can create assessments in one of two ways.

    a. If you already have coaching clients registered, you can go directly to Client and Coaching Management (under Manage Clients & Coaching from the drop-down menu). Here you will see a list of your Active clients, Inactive clients and Prospects. Clicking on any name will drop down a range of tools.

    Click on Assessments and Resources. From the Assessments and Forms tab, you can create and assign Assessments.

    b. Or you can create assessments from Coaching and Course Tools (under Coaching and Courses). Just click on Assessments and resources in the left hand panel.

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2. No matter which page you choose, there will be a button in the main box saying "Create an assessment." Click this button and an area will drop down where you can create your assessment.

Choose a title and write a description. Give any instructions here that your client will need for responding to the assessment. You can also choose to group your assessments into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

3. Next, create your questions. These can be in the form of Yes/No, short answer, paragraph or multiple choice. If you choose multiple choice, create each alternative your client can choose from. You can create as many questions as you like—just click on "Add additional question."

4. All your assessments created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing Assessments and Forms

You can edit your assessments by clicking the link View/edit assessment then selecting Edit. After making your changes, if you select Save edited assessment, the assessment will be edited with your changes (this option is only available if the assessment hasn't been responded to by anyone yet). If you choose Save new version of assessment, your edits will create a new version of the assessment.

Assigning Assessments and Forms

1. You can assign assessments from the Coaching Management page. Just click on the client's name you

want to assign the assessment to from list of your clients on the left-hand side of the page, and then select Assessments and resources from the drop-down menu.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your assessment.

You can also assign assessments (and any other tools) from the Appointments and Coaching Notes page, under the entry for that appointment. You can do this during your coaching sessions to really streamline the process, and keep you on top of your client's progress.

What does my client see from their dashboard?

Your client will be able to respond to your assessments from the Coaching Pad in their dashboard.

How÷ do I view completed Assessments and Forms?

1. 1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

   Click comment below any assessment to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

2. You can also read your client's responses to your assessments from the same page where you created the assessment (the Assessments and resources page in Coaching management).

3. Once your client has submitted the assessment, "Client's responses pending" will change to "View client's responses." Click on this link and the questions and answers to the assessment will drop down.

4. To comment, just click the link Comment on client's responses at the bottom of the assessment. Clients can comment back, and this way you can have a productive exchange regarding your client's self assessment, drawing out meaning from their responses, and using it to further your client's success towards their goals.

PRIORITIES AND TIME MANAGEMENT

List five things that you feel are important for you to do during your day
1. spend time with family
2. work productively
3. cook nutritious meals
4. meditation
5. exercise

List the five activities that take up the greatest proportion of your time
1. working
2. chores
3. meal preparation
4. responding to emails
5. TV

➡ Comment on client's responses

List the five activities that take up the greatest proportion of your time
1. working
2. chores
3. meal preparation
4. responding to emails
5. TV

Write a comment...

Submit   Cancel

v. RESOURCES

WHY USE RESOURCES IN MY COACHING?

You may have additional information you want to pass onto your clients. You can do this easily from your dashboard. Collect and keep track of the extra resources you send out regularly in one easy location. You can upload any kind of document, and you can even create resources yourself from scratch. Then just assign them to the clients you want, when the time is right.

HOW DO I USE RESOURCES?

You can easily upload documents or create your own resources which you can then assign to clients.

Creating and Uploading Resources

1. You can create resources in one of two ways.

   a. If you already have coaching clients registered, you can go directly to Client and Coaching Management (under Manage Clients & Coaching from the drop-down menu). Here you will see a list of your Active clients, Inactive clients and Prospects. Clicking on any name will drop down a range of tools.

      Click on Assessments and resources. From the Resources tab, you can create and assign resources.

   b. Or you can create resources from Coaching and Course Tools (under the Coaching and Courses drop down in your dashboard menu). Just click on Assessments and resources in the left hand panel, and chose the Resources tab.

2. No matter which page you choose, there will be a button in the main box saying "Create or upload a resource." Click this button and an area will drop down where you can create your resource.

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Choose a title and write a description. You can also choose to group your resources into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

3. Next, you can either upload documents or create a resource.

   a. Use the WYSIWYG editor to create a new resource in fully formatted HTML that will be available right in your client's coaching dashboard. Just enter your text in the box as you would if you were creating a text document. You can choose font styles, sizes, colors and any other features you would with a normal word processor. You can also add links and insert images. You can even create anchors to link different sections within the resource. For advanced layout, use block quotes, bullets, indentation and tables. Hover your mouse over an icon to find out what it does.

   b. Alternatively, you can upload a document to make available to your clients.

4. All your resources created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing resources

You can edit your resources by clicking the link View/edit resource then selecting Edit. After making your changes, if you select Save edited resource, the resource will be edited with your changes. If you choose Save new version of resource, your edits will create a new version of the resource.

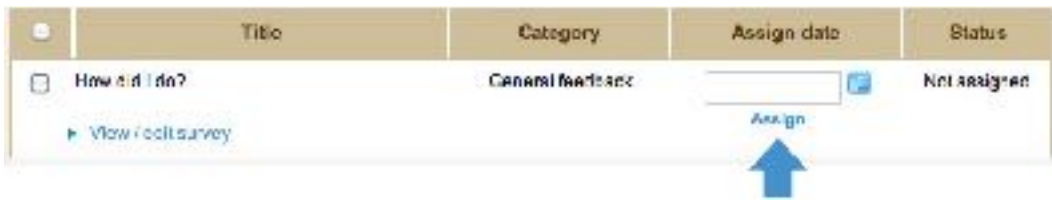## Assigning resources

1. You can assign resources from the Coaching Management page. Just click on the client's name you want to assign the resource to

from the list of your clients on the left-hand side of the page, and then select Assessments and resources from the drop-down menu. Select the Resources tab.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your assessment.

You can also assign resources (and any other tools) from the Appointments and Coaching Notes page, under the entry for that appointment. You can do this during your coaching sessions to really streamline the process, and keep you on top of your client's progress.

What does my client see from their dashboard?

Your client will be able to access your resources from the Coaching Pad in their dashboard. Resources will display in the same fashion as you see them in your own dashboard window.
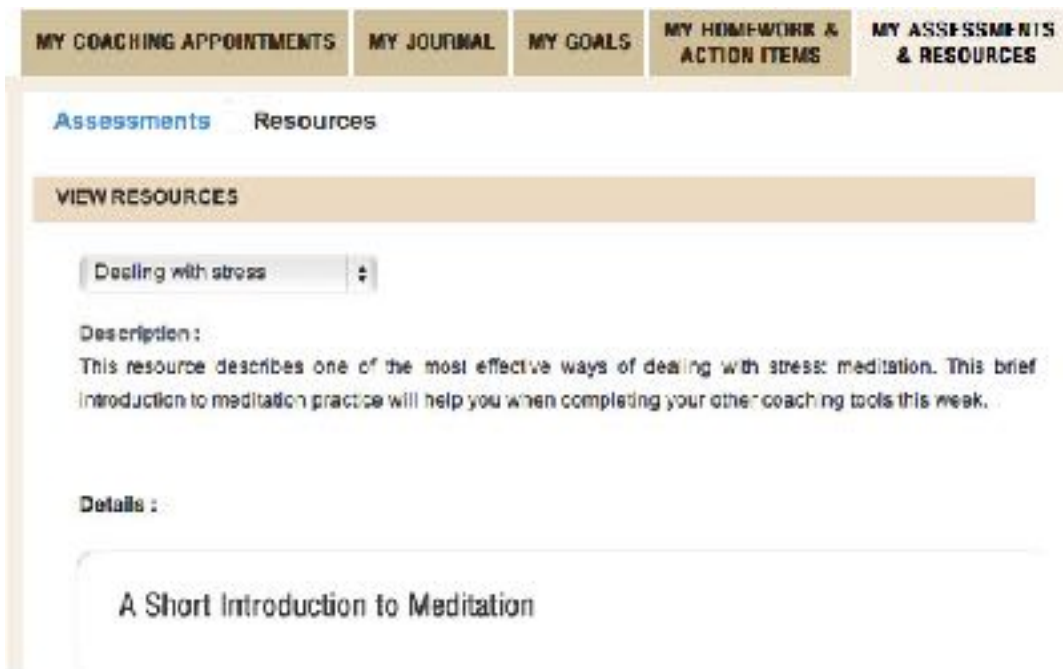
vi. FEEDBACK SURVEYS

WHY USE FEEDBACK SURVEYS IN MY COACHING?

Gather immediate feedback on what is working and what needs improvement in your coaching so you can adjust accordingly, and keep your client on the path to success. You can tailor individual surveys on all the criteria that are important to you, and re-use these multiple times.

HOW DO I USE FEEDBACK SURVEYS?

You can easily create your own personalized feedback surveys which you can assign to clients. Your client will be able to post answers to your surveys, and you will be able to comment on their responses.

Creating feedback surveys

1. You can create feedback surveys in one of two ways.

    a. If you already have coaching clients registered, you can go directly to Client and Coaching Management (under Manage Clients & Coaching from the drop-down menu). Here you will see a list of your Active clients, Inactive clients and Prospects. Clicking on any name will drop down a range of tools.

    Click on Feedback. From this page you can create and assign feedback surveys.

    b. Or you can create feedback surveys from Coaching and Course Tools (under Coaching and Courses). Just click on Feedback in the left hand panel.

2. No matter which page you choose, there will be a button in the main box saying "Create a survey." Click this button and an area will drop down where you can create your feedback survey.

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Choose a title and write a description. Give any instructions here that your client will need for responding to the survey. You can also choose to group your feedback surveys into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

3. Next, create your questions. These can be in the form of Yes/No, short answer, paragraph or multiple choice. If you choose multiple choice, create each alternative your client can choose from. You can create as many questions as you like—just click on "Add additional question."

4. All your feedback surveys created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing feedback surveys

1. You can edit your feedback surveys by clicking the link View/edit survey then selecting Edit. After making your changes, if you select Save edited survey, the survey will be edited with your changes (this option is only available if the survey hasn't been responded to by anyone yet). If you choose Save new version of survey, your edits will create a new version of the survey.

Assigning feedback surveys

1. You can assign feedback surveys from the Coaching

Management page. Just click on the client's name you want to assign the survey to from list of your clients on the left-hand side of the page, and then select Feedback from the drop-down menu.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your survey.

You can also assign surveys (and any other tools) from the Appointments and Coaching Notes page, under the entry for that appointment. You can do this during your coaching sessions to really streamline the process, and keep you on top of your client's progress.

What does my client see from their dashboard?

1. Your client will be able to respond to your feedback surveys from the Coaching Pad in their dashboard.

How do I view completed feedback surveys?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

   Click comment below any survey to leave a comment. Clients can comment back, and this way you can have a

productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

OR

2. You can also read your client's responses to your feedback surveys from the same page where you created the survey (the Feedback page in Coaching management).

3. Once your client has submitted the survey, "Client's responses pending" will change to "View client's responses." Click on this link and the questions and answers to the survey will drop down.

4. To comment, just click the link Comment on client's responses at the bottom of the survey.

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E. ONLINE COACHING

WHY SHOULD I OFFER ONLINE COACHING?

Online coaching is growing market. Offering online coaching opens up your repertoire and is appealing to a demographic who wants accountability and motivation but prefers an online engagement style.

Online coaching is a great way to expand your services. You can cater to people who feel they are too busy for live coaching, like the anonymity, require a lower price point, or simply are more comfortable using computers. You can coach more people in less time, meaning you can offer your services to a greater range of people.

Online coaching is perfectly suited to your dashboard. The system is set up so that you can assign a range of coaching tools, receive feedback from your clients, and comment back, engaging in an ongoing and stimulating online coaching process.

HOW DO I CONDUCT COACHING ONLINE?

Online coaching is similar to coaching with live interaction, except everything is done online. So instead of making appointments to talk to your clients, you set up a regularly scheduled day when they submit a coaching progress report to you. A coaching progress report is similar to the Coaching Plan and Follow-up that your offline clients complete, and asks your online clients about their successes, challenges, action items and goals since the last time they reported progress to you. You can then respond to each answer by clicking Comment.

This is where you can do your coaching work, asking powerful questions and helping to move your client forward towards their goals. Your client can respond in turn, and you can have a meaningful coaching exchange, completely online.

In between coaching progress days, you can use all the other coaching tools to further their coaching progress. Assign homework and action items to move your client forward; get your client journaling about issues that come up during your regular coaching work; assign assessments to take a reading of where they are and where they want to be; set goals in conjunction with your client to help them reach success; create and make available further resources; request feedback to calibrate your coaching and target it to what your client needs.

Online coaching is a simple, effective way of helping clients, and is easily administered using your dashboard tools.

HOW DO I OFFER ONLINE COACHING IN MY CATALOG?

It's easy to engage in online coaching with your clients using your dashboard tools.

Creating an online coaching offering

Create an online coaching offering for your catalog. Click Catalog under the Business & Shop dropdown in your menu. Then select Add coaching from the left hand panel. Create your coaching offering as usual, but make sure to select ONLINE as the type of coaching (under the Settings heading).

Adding your client's Coaching progress report day in Client settings

1. When your clients sign up with you, you can communicate with them using the Mail system. Set up a schedule for when and how often you want your client to submit a Coaching Progress report.

   ○ To enter this schedule, open up Coaching management. Then click on the client's name from the drop down menu on the left hand side and choose Client settings.

- ○ Scroll down to the Coaching modalities heading. Click the Edit details button.

- ○ Then you can select a frequency (how often you want your client to submit their Coaching progress) and the day it is due. Choose today's date as the Starting from date if your regular day and time starts immediately, or else schedule it to begin in the future.

Where your online sessions will show up after you schedule your client's regular Coaching progress day

1. In the Appointments and coaching progress page of Coaching management, click the Online coaching tab. Your regularly scheduled coaching day and time will populate the list of sessions. You can check here to view your client's Coaching Plans when they are complete.

Offering name	Date progress due	Status
Salmon's online coaching ▶ Client progress	01 Jun 2012	Plan completd on 01 Jun 2012
Salmon's online coaching ▶ Client progress	04 Jun 2012	Plan not completed yet

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2. From the Coaching Appointments tab in their Coaching Pad, your client will see a list of dates when their Coaching progress is due. Your client can select the relevant date in order to view and post their Coaching progress reports. Scheduling your regular coaching day and time is important because it allows their coaching progress plans to be available for them to complete in advance.

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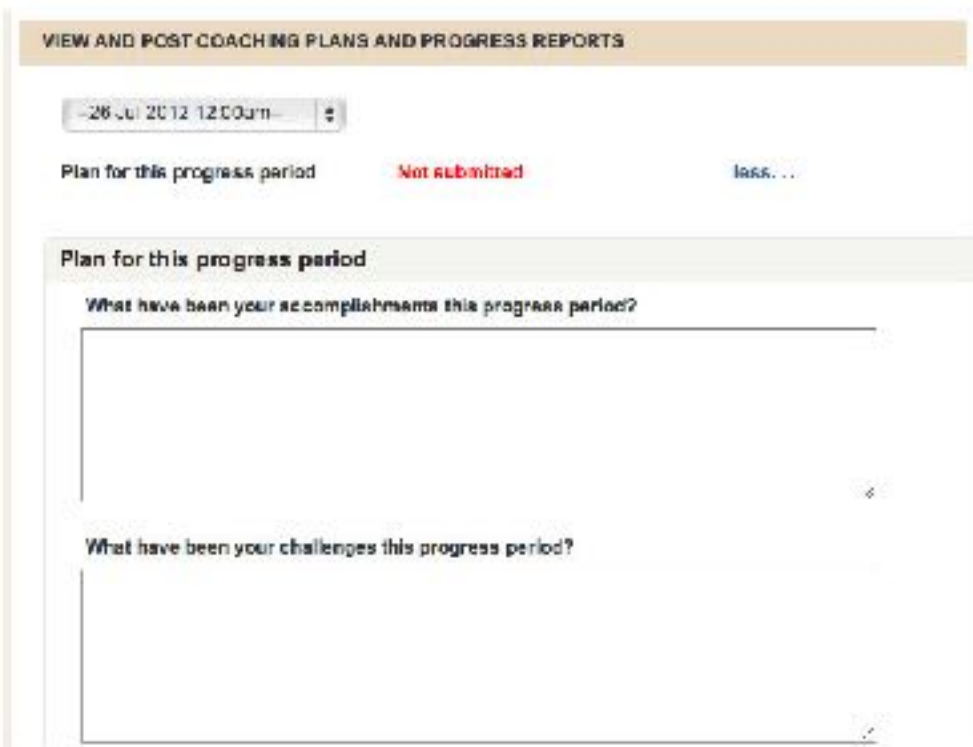
GET STARTED COACHING ONLINE

Use and customize your Coaching progress reports

Review how to use and customize Coaching progress reports for your online clients in the Coaching Plans chapter of this tutorial.

Make use of all the other coaching tools

Make use of the raft of coaching tools at your disposal to help your clients reach their goals faster. All tools enable rich, meaning ful interaction which is completely online.

- [Journaling](#)

- [Goal setting](#)

- [Homework and Action items](#)

- [Assessments and Forms](#)

- [Resources](#)

- [Feedback surveys](#)

F. GROUP COACHING

WHY SHOULD I OFFER GROUP COACHING?

Group coaching is a terrific way to expand your repertoire and reach more clients. You can coach more people for a lower price point with group coaching, making it an excellent way to reach those who might find private coaching too costly. You can also offer online group coaching, which allows you to save even more time.

HOW DO I CREATE A GROUP COACHING OFFERING?

Group coaching works in a similar way to regular coaching, except instead of offering private coaching calls, you can either offer group coaching calls, or eliminate live interaction in favour of online delivery.

To deliver group coaching using your dashboard, you just need to create a course and use the Course Management system. Whereas Coaching Management facilitates interaction between you and one other client, Course Management allows you to interact with multiple clients, to facilitate a group coaching experience.

You can do everything with Course Management that you currently do with Coaching Management, including assigning all the coaching tools. You can also create HTML rich content called E-Modules that are delivered automatically to your course members.

Create a course to offer as group coaching

Create a course that you can offer as group coaching. Click Catalog under the Business & Shop dropdown in your menu. Then select Add new course.

Plan your coaching calls

Add the coaching calls that will be included with this group coaching offering. So instance, if your group coaching lasts for three months and you want to have a every two weeks, add six coaching calls to the section called Course Content: Coaching Calls. Each call should have a title and a description.

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Then choose your delivery interval. This can either be a regular interval such as weekly, or according to the specific dates you select.

If you offer each individual coaching call at more than one time, to suit people's schedules, select "Manual selection." Then you can fill in three alternate times per call next to Date.

You won't be able to change the dates of your coaching calls after your group coaching offering starts, but you can post a Course notice letting everyone know of the change.

Add your coaching call access details

Let your clients know how to access your group coaching calls. There are a variety of services online that will allow you to make coaching calls or webinars available to a group of people. Convey the details your course members need to access these calls in one of two ways:

1. If the access details for all your group coaching calls remain the same, you can include these details on the Add course page in the section called Coaching call procedure. This information is not made public, but will only be viewable by registered course members.

2. If the access details change for each call, enter the specific details for each call using the Sessions page in Course management (after you have created your course). Click on Course Management, under Courses & Coaching. Click on your course name and then select Sessions from the left hand menu.

   a. Click View/edit coaching call under the Session title.

b. The coaching call details area will drop down. Click the Edit link. You'll be able to add or edit your Coaching call number and procedure.
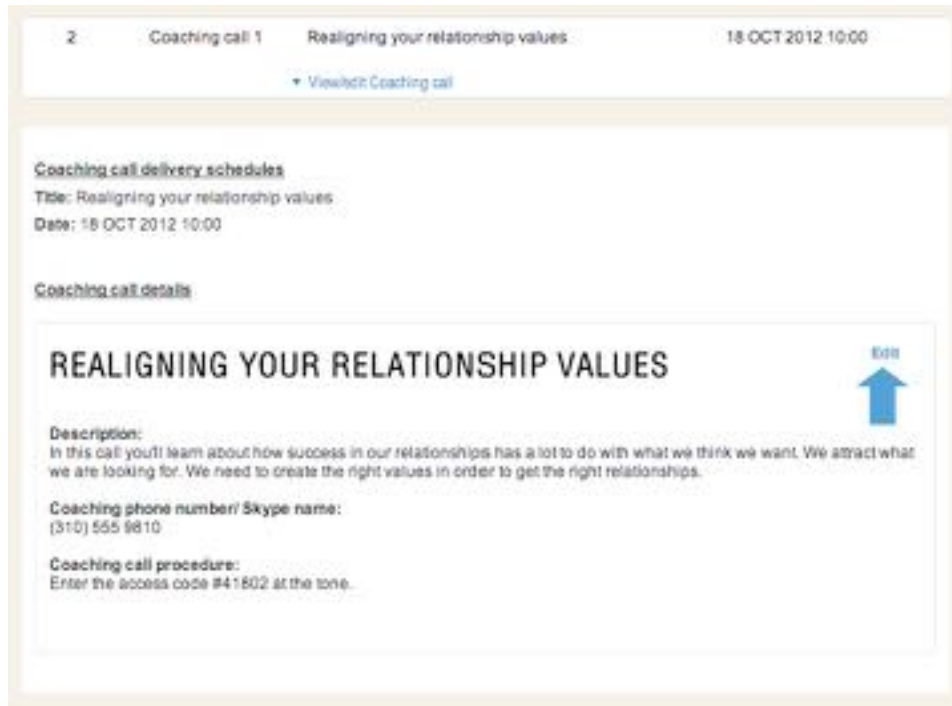
Add E-modules, if desired

Courses also allow you to offer modular content delivered automatically to your course members. This can be in the form of web content, audio or video. You might want to use this option, or choose simply to stick with coaching calls. To find out more, read about Sessions and Creating Course Sessions.

Edit your coaching call information and assign coaching tools

You can use all the regular coaching tools in your group coaching, such as journaling, goal tracking, homework, assessments, resources and feedback. You just need to assign the tools you want to your coaching call. Or alternatively, you can create E-modules and assign coaching tools this way.

Adding Coaching tools to Coaching Calls

To add coaching tools to your coaching calls, assign specific tools for each call using the Sessions page in Course management, after you have created your course. Click on Course Management, under Courses & Coaching. Click on your course name and then select Sessions from the left hand menu.

a. Click the View/edit Coaching call link under the coaching call you'd like to edit.

b. The coaching call details area will drop down. Click the Edit link. You'll see a section at the bottom of the drop-down area where you can select and assign coaching tools. These will become visible and available for your group coaching clients to respond to as of three days before the coaching call date. Let them know if you want them to start thinking about the assignments before the call, or if they should wait until after listening to the call to get started responding.

You can make available any of your coaching tools to complement your coaching calls.

   o   Include access to additional resources you have created or uploaded.

   o   Assign an assessment or form to go with this topic.

   o   Assign action items or homework to allow course members to put the material immediately into practice.

   o   Assign a course goal to complement the material.

   o   Suggest your course members journal on a related topic.

   o   Get feedback on an aspect of the material or course.

Any of the coaching tools you have created, and any course goals specific to this course, will be available for you to assign to any coaching call. To create a new item, just follow the directions in the preceding chapters on how to create coaching tools.

Adding Coaching tools to E-Modules

To add coaching tools to your E-Modules instead, assign specific tools for each E-Module using the Sessions page in Course management. Follow the instructions for assigning coaching tools to coaching calls above but click the link to drop down the details for each E-Module instead of each coaching call. After you press Edit, you will see a section where you can select and assign coaching tools.

INVITE COACHING CLIENTS TO YOUR GROUP COACHING OFFERINGS

Let your coaching clients know about your group coaching and invite them to join. Your group coaching will also be listed on your Profile and in the Shop.

HOW DO I CONDUCT GROUP COACHING?

Communicate with your clients

Once your group coaching starts, you can coach your clients by communicating in a number of ways:

Hold group coaching calls

Your scheduled group coaching calls will act as a foundation for your group coaching, allowing your clients access to important personal interaction with you.

Assign and comment on coaching tools

Assign coaching tools such as journaling, homework, goals and assessments, and comment on your clients' responses. Your clients can also comment on each others' responses, allowing for an interactive peer coaching experience.

Post discussion threads

Use the discussion tool to further coaching interaction amongst your clients. You can engage in follow-up discussions around the topics you are exploring in group coaching calls and assigned coaching tools. You can lead these discussion or let your clients take the lead.

Post notices

If there are important matters you want to let all your clients become aware of, use the Notices tool to post a course notice.

Create E-Modules

You can also deliver coaching by preparing modular content for your clients to work through, know as E-Modules. This frees up more of your time. You might even choose to run purely virtual or online group coaching this way.

Read and respond to journal entries, goal progress, homework progress and assessments

If you have assigned coaching tools to complement your group coaching calls or E-Modules, you can view your clients' responses in the Course management page specific to that coaching tool. View journal entries on the Course Journal page, homework progress on the Homework and action items page, goal progress on the Goals page, assessment responses on the Assessments page, and survey responses on the Feedback page. Read more about each coaching tool in the chapters on Course tools

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HOW DO I PROVIDE A RECORDING OF MY CALLS?

For clients who miss your coaching calls, you can provide a recording for them to access. Just record your coaching call in audio or video format while you deliver it. After the call is over, an area will appear in the Coaching Call drop down on the Sessions page for the course, where you can upload an audio recording of the call or link to a video recording on YouTube. Read the instructions for linking to a YouTube video on the Course Sessions page.

You can upload here a recording of your call, or link to a video recording, for any course members who missed the live call.

Link a video file if you wish.

Video file url:

Upload an audio file if you wish.

Audio file: Choose File   No file chosen

Save   Cancel

WHAT DO MY GROUP COACHING CLIENTS SEE FROM THEIR DASHBOARD?

Your group coaching clients will be able to access all their group coaching material with you from their Course Pad. They'll be able to see when coaching calls take place, and access coaching tools you have assigned three days before each call.

If you have assigned any coaching tools, your course members can complete these by following the link listed next to each item. For instance, by following the link next to Journal topic, they will be taken to the Journal page of their Course Pad, where they can read the topic description, and write and submit their journal entry.

From their Course Pad, your course members will be able to view your session content. They'll also be able to watch any videos and stream any audio you have included.

LEARN MORE BY READING ABOUT COURSES

Now you have mastered group coaching, read more about offering courses as a way of expanding your coaching repertoire.

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STEP 7: GET STARTED OFFERING COURSES

A STEP BY STEP TUTORIAL

Offering courses is a breeze using your dashboard's coaching tools and features. This tutorial will guide you through the main features of the system so you can get started right away!

What this tutorial covers

A. HOW COURSES WORK

Courses allow you to offer group coaching, deliver information products, or conduct coach training. The possibilities are endless. Find out why courses are a great addition to your repertoire, and how they work.

B. COURSE WELCOME MATERIAL

Course members will receive welcome material automatically delivered once they purchase a course from you. You can use your default course package or customize it for each course.

C. COURSE SESSIONS

The content of your course can consist of coaching calls and/or HTML-rich content known as E-Modules. E-Modules allow you to embed links to videos and audio, and to easily create HTML pages of information including links and images.

D. NOTICES AND DISCUSSION

You and your course members can carry on lively discussions through the discussion tool .You can also post course notices.

E. GETTING TO KNOW AND USE COURSE TOOLS

All the coaching tools are also available for your courses. Integrate journaling, homework, goal-tracking and assessments into your courses to create a rich and interactive coaching experience.

Course management on your dashboard

The Course Management link in your dashboard is where you will go to administer your courses and group coaching (under the Coaching & Courses drop down menu). When you click the link, you will see all your courses listed on the left hand side of the screen. Clicking on a course name will expand the list so you can administer its settings, create session content, post notices and discussion topics, and assign coaching tools such as goals and journaling.

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If no courses are showing up, create a new one from the Catalog link (under Billing & Shop). Select Add New Course.

Add
   Add new coaching
   Add new course
   Add new product
   Add new service

You can also create and manage many of your coaching tools from the Coaching and Course Tools link in the Coaching & Course drop down menu.

COACHING & COURSES   EXPERT CONTRIB

   COACHING MANAGEMENT
   COURSE MANAGEMENT
   COACHING AND COURSE TOOLS

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A. HOW COURSES WORK

WHY SHOULD I OFFER COURSES?

Group coaching

Courses are a great way to offer your coaching services. You can use them to facilitate group coaching, allowing you to offer your services to a greater group of people, at a different price point. Group coaching lets you reach a larger audience, and also allows your course members to interact with each other, creating a rich, dynamic coaching experience for all. Offer group coaching by creating one or more courses. Your group coaching can take place completely online, or integrate traditional live interaction through group coaching calls.

Courses as information products

You can also offer courses as a form of information product, allowing you to earn a passive income. Just think of a topic that you know about, and break it up into several chunks, or "modules." Create these digital modules, or "E-Modules," easily from your dashboard, and choose a schedule for delivery. Now your course is ready to go, and anyone show signs up will automatically be delivered your content in a modular fashion, along with any coaching tools you have assigned. Offer your courses sequentially, allowing course members to join when it suits them and work through your material at their own pace. Feel free to experiment with the range of subject areas available. The possibilities are endless. Publish articles on the same topics, linking to your course, to be people interested in you and learning more from you.

Coach training

Consider offering training for those wanting to become coaches, or coaches needing to update their skills for accreditation. You can easily offer courses that will meet the International Coach Federation's criteria by including live coaching calls.

HOW DO COURSES WORK?

It's easy to expand your repertoire and offer group coaching, courses or coach training. Just follow these simple steps:

1. Add a course to your catalog.

2. Create the content for your course and schedule your course sessions. If this is group coaching, you might want to offer group coaching calls. If it's a self contained course, you can create HTML rich material for your course called E-Modules that will be delivered to your course members in modules.

3. Invite clients to join your course. Others will find it using in the Shop based on the description you wrote when creating your course, so make it sound as enticing as possible. When clients buy your course, you'll be notified. Each new course member will receive your welcome material and agreement. You can tailor these for each course, or use your default welcome package.

4. When the course starts, clients will access the course content from their dashboard. E-modules and coaching call access details will be delivered based on the course schedule.

5. You can assign any other course tools in any of your courses, to create an interactive and dynamic experience for your clients.

   ○ Course notices

   ○ Course discussion

- Journal topics

- Homework and action items

- Goals

- Assessments

- Resources

- Feedback

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B. COURSE WELCOME MATERIAL

WHAT IS COURSE WELCOME MATERIAL?

Welcome your course members to each course with welcome material, which will be sent out automatically after a client purchases a course with you. Course welcome material will contain a welcome letter and a course agreement. You can also add any of your other assessments or resources. You can send out your default course welcome material, or you can set individual welcome material for each of your courses.

HOW DO I USE AND CUSTOMIZE MY WELCOME MATERIAL?

It's easy to edit any part of your course welcome material. Just go to the Coaching and Course Tools page, located under Coaching & Courses on your dashboard menu. Choose Welcome Package Forms from the left hand menu. Select the tab called Course Welcome Material.

Customizing your welcome material

1. You can edit your course welcome material in two ways.

    a. You can edit the default course welcome material. This is the material that is sent out by default if you haven't specified anything else to take place.

    b. Alternatively you can change the welcome material for each course, for instance by customizing the welcome letter or including different additional items and resources. Click on the course name and the list of items in your welcome material will drop down.

2. To customize the welcome material, click on the item you wish to edit. The current version will drop down. Click Edit to edit the item.

    o The welcome letter and agreement will reveal a WYSIWYG box where you can add formatting to your letter and change the text.
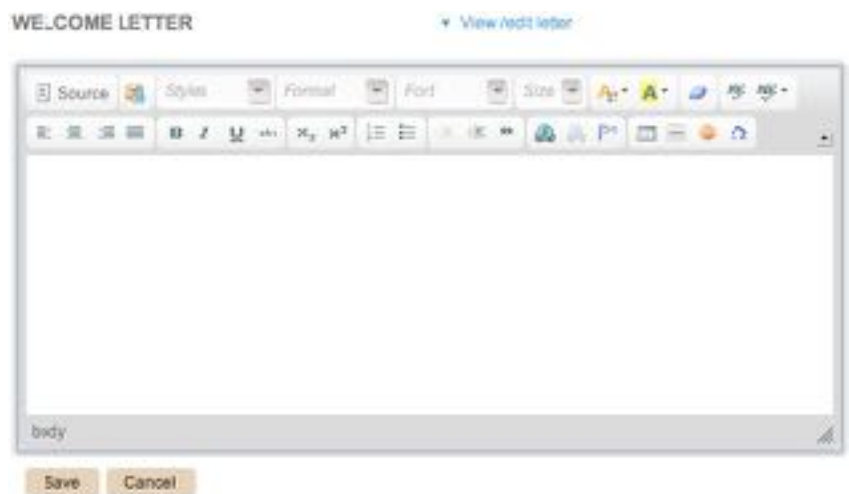
- To add additional assessments or resources, click the Select drop-down menu. Check the boxes of all items you want included.

ADDITIONAL FORM OR RESOURCE

-- Select --

You can create new forms and resources in Assessments and resources.

Save

You can create additional assessments and resources from the Assessments and resources page in Coaching and course tools.

COACHING AND COURSE TOOLS

Welcome package forms

Coaching plans

Journal topics

Homework and action items

Goals

Assessments & resources

Feedback surveys

Viewing completed forms from your welcome material

Answers to any extra assessments you included will be visible to you in the Assessments and resources tab of Course management for that course.

COACHING & COURSES   EXPERT CONT

COACHING MANAGEMENT

COURSE MANAGEMENT

COACHING AND COURSE TOOLS

Homework and action Items

Course goals

Assessments and resources

Feedback

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C. COURSE SESSIONS: E-MODULES AND COACHING CALLS

i. INTRODUCING COURSE SESSIONS

WHAT ARE COURSE SESSIONS?

Sessions are the heart of your course. Your course will generally be organized around course material delivered in modular format, a series of scheduled group coaching calls, or or both.

- Course content delivered in a modular fashion is organized as a series of electronic modules, or E-Modules. You can create these from your dashboard, and include text, images, audio and video. You can also assign any of your coaching tools to go along with each module. E-modules are delivered automatically to your course members based on the schedule you choose.

- Coaching calls can be scheduled as well. Your course members will be alerted when and how to access these calls. You can assign coaching tools to complement your coaching calls.

WHAT ARE E-MODULES?

E-modules consist of electronic session content that you can make available to your clients from their dashboard. An E-module can include any or all of the following:

- HTML rich content viewable by your course members which can incorporate text, images, tables, links, and anything else you would include on a webpage.

- Uploaded documents and audio recordings.

- Embedded videos.

- Homework, journal assignments, goals or assessments you have assigned.

Your course members will view the E-Module content from their dashboard on the date it becomes available according to the schedule you have set.

WHAT ARE COURSE COACHING CALLS?

Courses can incorporate group coaching calls easily. If you are conducting group coaching, you will probably have regular coaching calls, unless the coaching is completely online. Other types of courses might also include coaching calls, as an alternate way to deliver course material.

How do I provide access details for coaching calls to my course members?

There are a variety of services online that will allow you to make coaching calls or webinars available to a group of people. Convey the details your course members need to access these calls in one of two ways:

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1. If the access details for all your group coaching calls remain the same, you can include these details on the Add course page in the section called Coaching call procedure. This information is not made public, but will only be viewable by registered course members.

2. If the access details change for each call, enter the specific details for each call using the Sessions page in Course management. Click on Course Management, under Courses & Coaching. Click on your course name and then select Sessions from the left hand menu.

    a. Click View/edit coaching call under the Session title.

b. The coaching call details area will drop down. Click the button Edit Coaching call. You'll be able to add or edit your Coaching call number and procedure.

HOW DO I CREATE COURSE SESSIONS?

Create your course sessions by following these two simple steps, described in the following two chapters.

1. To create your course sessions, first you will want to decide on a schedule of delivery - how many (if any) E-Modules you will include, how many (if any) coaching calls, and when they will take place.

2. You'll then create the actual content of the E-Modules, and edit your Coaching calls.

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ii. CREATING A COURSE SCHEDULE

When you first create your course in the Financials and Shop Management section, you'll decide how many E-Modules and/or coaching calls you want to include, and when they will be delivered.

YOUR INTRODUCTORY MODULE

When your course starts, your course members will be able to access all the tabs in their course. So that they are not greeted by a blank Sessions page, and to welcome them to the course, you'll create an introductory module. This could be as simple as a welcome message, or it could be the first module you are delivering, with full content. In the section marked Introductory Module, just choose a title and write a short description. You'll be able to create the content for this and all other E-Modules from Course management after the course is created.

SCHEDULING E-MODULES

- Add a title and description for each E-Module you are including in the course in the section "Course Content: E-Modules." The title and description will show up in the Course description page in the Shop, and also in your course members' Course Pad.

- Then choose a regular interval for delivery (e.g. weekly) or the specific dates you want.

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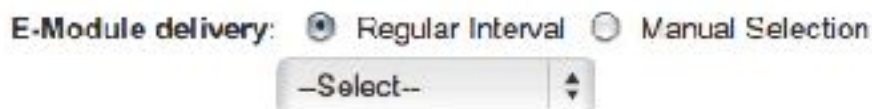
SCHEDULING COACHING CALLS

    a.   Add a title and description for each coaching call you are including in the course in the section "Course Content: Coaching Calls." The title and description will show up in the Course description page in the shop, and also in your course members' Course Pad.

    b.   Then choose a regular interval for delivery (e.g. weekly) or the specific dates you want.

If you offer each individual coaching call at more than one time, to suit people's schedules, select "Manual selection." Then you can fill in three alternate times per call next to Date.

EDITING YOUR COURSE SCHEDULE LATER

You can edit this schedule later as long as no one has purchased the course.

    a.   Just select View Courses in Financials and Shop management.

    b.   Click on the name of the course.

    c.   Then click the Edit button in the top right corner. If the course has not been purchased yet, you will be able to edit the delivery schedule for E-Modules and coaching calls. Even if it has been purchased, you can still edit the titles and descriptions for any of your E-Modules or coaching calls.

You won't be able to change the dates of your coaching calls after your course starts, but you can post a Course Notice letting everyone know of the change.

CREATING YOUR COURSE CONTENT

After creating your course schedule, you'll want to create the actual content of your course, described in the next chapter.

iii. CREATING COURSE SESSIONS

CREATE YOUR COURSE SESSIONS

Now that you have decided on your <u>schedule of delivery</u>, you can start creating your session content.

1. You'll create the actual <u>content of your E-Modules</u>.

2. You'll <u>edit your Coaching calls</u>.

CREATING E-MODULE CONTENT

After you decide how many modules you want, you will want to actually create the E-Module content as it will appear for your course members, including your Introductory Module.

1. Click on Course Management (under Courses & Coaching). Click on your course name and then select Sessions from the left hand menu.

2. All sessions will be listed in order of delivery. Click View/edit E-Module to view each E-Module you have included in the course. Click Edit to create the content.
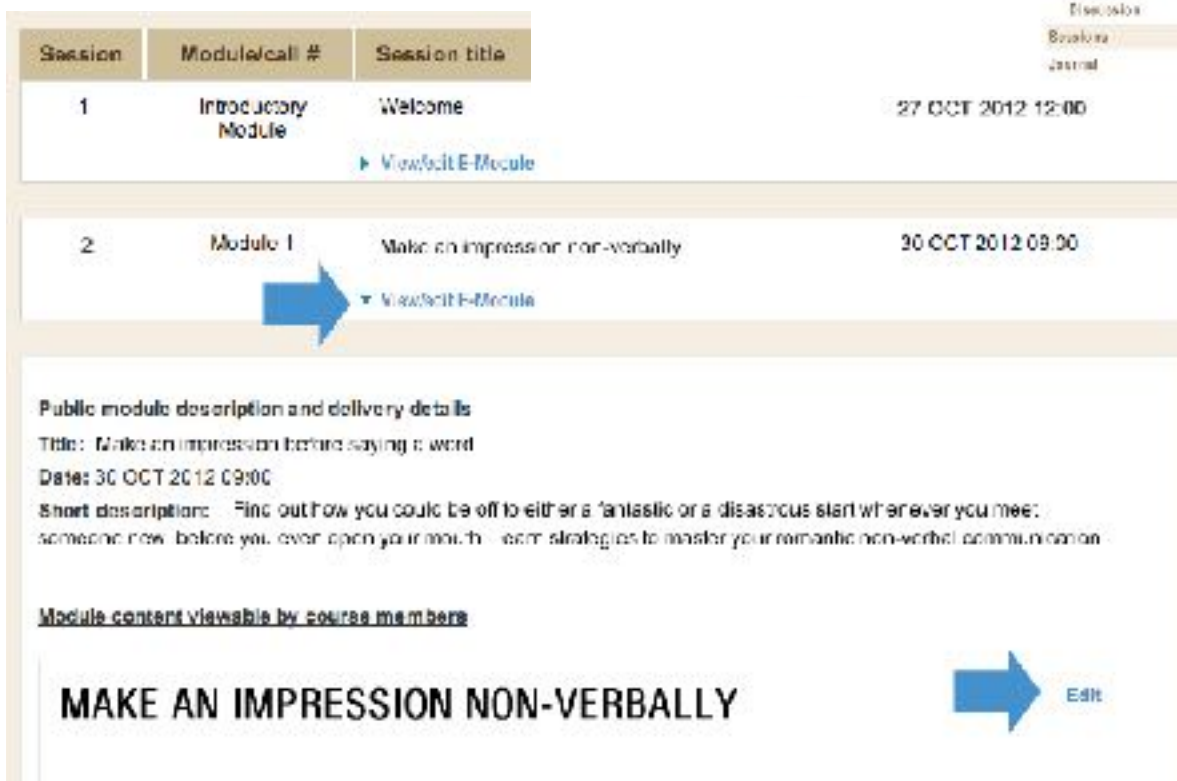
a. The WYSIWYG editor will allow you to create rich content for your course members, similar to a web page. You can write text, add images, incorporate tables, use bullets and other formatting and add links. Present your content in an attractive and user friendly manner. How you input it is how your course members will see it from their own dashboard.

MAKE AN IMPRESSION NON-VERBALLY

▶ Edit E-Module

WHAT MESSAGES ARE YOU SENDING?

Did you know that 70% of our communication is non-verbal? We signal a lot to our mate before we even open our mouths.

Here are just a few of the ways that we communicate non-verbally.

TYPE OF NON-VERBAL	EXAMPLES
Paralanguage	Tone of voice, Clarity, Non-words (umm, shh), Projection of voice
Kinesics	Facial expressions, Gestures, Posture (e.g. fidgeting), Eye contact
Proxemics	Posture (e.g. leaning forward), Proximity to the other person
Semiotics	Clothing, Jewellery, Makeup, Hair, Perfume

How much difference does this have on our romantic success? A lot!

This week we'll look at how we can start identifying our patterns of non-verbal communication so we get off to the right start with people we meet.

WATCHING NON-VERBAL COURTSHIP IN REAL TIME

Watch the video below to learn more about how non-verbal communication can make or break a romantic encounter.

PUTTING IT INTO ACTION

This week our coaching tools will focus on helping us to isolate the things we are doing right and wrong non-verbally.

1. You'll start with an assessment of your non-verbal abilities.
2. Then I've set you some action items for improving your non-verbal communication.
3. And I'll open up a journal topic where you can chart your non-verbal successes and challenges in real time. Remember to give each other feedback!

b. To complement your module content, you can create an unlisted video on YouTube and embed it within your module. To create an unlisted video on YouTube, follow these instructions provided by YouTube Support (http://support.google.com/youtube/bin/support.google.com/youtube/bin/answer.py?hl=en&answer=181547):

- Sign into your YouTube Account

- Click on your account name located in the top right of any page. Click on Video Manager from the expanded menu.

- Choose the video you want to edit and click the Edit button below the video thumbnail.

- Scroll down to the Basic Info tab and find the Privacy section.

- You'll see the option to make the video Public, Unlisted, or Private.

- Select Unlisted. Make sure to click the Save Changes button at the bottom of the page

Then just copy the URL that appears in the URL bar of your browser and paste it into the field marked Video URL in your Course management window.

c. You can also complement your content with an audio recording. Just click Choose file next to the field marked Audio file. Your course members will be able to listen to the audio recording just by clicking Play in their Course Pad.

d. To build on material you cover in your course, you can employ a range of coaching tools.

- Include access to additional **resources** you have created or uploaded.

- Assign an **assessment or form** to go with this topic.

- Assign **action items or homework** to allow course members to put the material immediately into practice.

- Assign a **course goal** to complement the material.

- Suggest your course members **journal** on a related topic.

- Get **feedback** on an aspect of the material or course.

Any of the coaching tools you have created, and any course goals specific to this course, will be available for you to assign to any E-Module. To create a new item, just follow the directions in the following chapters on how to create coaching tools.

You can choose to assign any of your currently uploaded resources, forms, homework assignments, goals, journal topics or feedback surveys, as part of this E-Module. Just select all those you would like from the list.

Resources:	-- Select --
Forms:	-- Select --
Homework:	-- Select --
Goals:	-- Select --
Journal topic:	-- Select --
Feedback:	-- Select --

EDITING COACHING CALL INFORMATION

After you decide how many coaching calls you will be including, edit the information that will display for your course members.

1. Click on Course Management (under Courses & Coaching). Click on your course name and then select Sessions from the left hand menu.

2. All sessions will be listed in order of delivery. Click View/edit Coaching call to edit the coaching call details for each call, if desired.

Session	Module/call #	Session title	Delivery date
1	Module 1	Starting the conversation	16 OCT 2012 19:00
		▸ View/edit Module	
2	Coaching call 1	Realigning your relationship values	16 OCT 2012 0:00
		▾ View/edit Coaching call	

Coaching call/delivery schedule   Edit public description

Title: Realigning your relationship values

Date: 29 NOV 2012 16:00

Short description: In this call you'll learn about how success is our relationships has a lot to do with what we think we want. We attract what we are looking for. We need to create the right values in order to get the right relationships.

Coaching call details

REALIGNING YOUR RELATIONSHIP VALUES   ▸ Edit Coaching call

Description:
In this call you'll learn about how success in our relationships has a lot to do with what we think we want. We attract what we are looking for. We need to create the right values in order to get the right relationships.

Coaching phone number/Website URL:
(310) 555 0110 x10023

Coaching call procedure:
Enter the access code #418023 at the tone.

Journal Topic : Find your inner strength

Feedback : How did I do?

a. The description you filled in when creating your course is automatically entered into the description field, but you can choose to expand upon this information if you wish.

Description:

In this call you'll learn about how success in our relationships has a lot to do with what we think we want. We attract what we are looking for. We need to create the right values in order to get the right relationships.

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b. If you filled in a coaching call number and procedure when creating your course, this is pre-filled, but you can edit it or add it if it changes for each call.

Provide the number to dial for this coaching call or enter your Skype details if you are conducting a call on Skype.

Coaching phone number/ Skype name:

(310) 555 0510

Provide any instructions for the call, including any access code required.

Coaching call procedure:

Enter the access code #41802 at the tone.

c. As with E-Modules, you can make available any of your coaching tools to complement your coaching calls. These will become visible and available for your course members to respond to as of three days before the coaching call date. Let them know if you want them to start thinking about the assignments before the call, or if they should wait until after listening to the call to get started responding.

- Include access to additional resources you have created or uploaded.

- Assign an assessment or form to go with this topic.

- Assign action items or homework to allow course members to put the material immediately into practice.

- Assign a course goal to complement the material.

- Suggest your course members journal on a related topic.

- Get feedback on an aspect of the material or course.

Any of the coaching tools you have created, and any course goals specific to this course, will be available for you to assign to any coaching call. Just select it from the drop-down menu. To create a new item, just follow the directions in the following chapters on how to create coaching tools.

If you choose to assign to one of your currently uploaded resources, forms, homework assignments, goals, journal topics or feedback surveys, as part of this E-Module select it from the list. You can add as many additional items as you like by clicking Add additional.

Resources: -- Select --

Forms: -- Select --

Homework: -- Select --

Goals: -- Select --

Journal topic: -- Select --

Feedback: -- Select --

HOW DO I PROVIDE A RECORDING OF MY CALLS?

For clients who miss your coaching calls, you can provide a recording for them to access. Just record your coaching call in audio or video format while you deliver it. Then upload an audio recording of the call or link to a video recording on YouTube in the brown box underneath your call description. Read the instructions for [linking to a YouTube video](#) above.

READ AND RESPOND TO JOURNAL ENTRIES, GOAL PROGRESS, HOMEWORK PROGRESS AND ASSESSMENTS

If you have assigned coaching tools to complement your group coaching calls or E-Modules, you can view your course members' responses in the Course management page specific to that coaching tool. View journal entries on the Course Journal page, homework progress on the Homework and action items page, goal progress on the Goals page, assessment responses on the Assessments page, and survey responses on the Feedback page. Read more about each coaching tool in the chapters on [Course tools](#).

WHAT DO MY COURSE MEMBERS SEE FROM THEIR DASHBOARD?

From their Course Pad, your course members will be able to view your session content. They'll also be able to watch any videos and stream any audio you have included.

If you have assigned any coaching tools, your course members can complete these by following the link listed next to each item. For instance, by following the link next to Journal topic, they will be taken to the Journal page of their Course Pad, where they can read the topic description, and write and submit their journal entry.

D. NOTICES AND DISCUSSION

WHAT ARE NOTICES AND HOW DO I POST ONE?

You might want to send out a notice to your entire course alerting them to a change in the schedule of coaching calls, or other important information. This is easy to do from your dashboard.

1. Select Course management from the link under Coaching & Courses in the main dashboard menu. Click on your course name to reveal the drop-down list and select Notices.

2. Click the button Create new notice. A pop-up will appear where you can write a subject line and your notice text. Your notices will appear in the window. Your course members will be alerted to your course notices.

WHAT IS COURSE DISCUSSION AND HOW DO I USE IT?

You and your course members' dashboards include a robust discussion system. You can continue the coaching dialogue online by leading discussion topics. Your course members can also create their own topics which might focus on aspects of your course they want to explore further with their course peers.

1. Select Course management from the link under Coaching & Courses in the main dashboard menu. Click on your course name to reveal the drop-down list and select Discussion.

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2. Click the button Start a new topic. A pop-up will appear where you can write a your new topic name.

3. Your topic will now be listed in the window. Click on the topic title to open up the topic and create a discussion post, if you want.

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E. GETTING TO KNOW AND USE COURSE TOOLS

WHAT KIND OF COURSE TOOLS ARE AVAILABLE FOR ME TO USE?

You have access to the same great range of coaching tools in your courses as you do for individual coaching. Assign a variety of these tools to create a value-added, interactive experience for your course members. Your course members can comment on each other's entries and posts, allowing for a rich coaching conversation that will move them towards their goals that much more quickly.

Journaling. Journaling allows you to assign thought-provoking topics for your course members to write about. Journaling has been shown to be effective in a number of regards, including providing focus, improving health, and reaching goals more quickly. You can assign topics, see how your course members respond, and leave comments.

Goal-tracking. Help your course members reach their goals faster. Chart and measure their progress toward success using the goals tool. Your course members can give you regular progress reports towards their goals, and read your comments, keeping them motivated and on track.

Homework and action items. Ask your course members to take action by assigning specific, measurable tasks and homework assignments. Relate these to your course work. Your course members will report on their homework progress, creating entries you can view and comment on.

Assessments and forms. Create your own assessments and forms to gather information about where your course members are and where they would like to be. Assessments take a reading of the current terrain-where your course members are at right now. They also allow you to plot a clear plan of action in your courses to see where your course members want to be and how you can help them get there.

Resources. You may have additional information you want to pass onto your course members. You can do this easily from your dashboard. Collect and keep track of the extra resources you send out regularly in one easy location. You can upload any kind of document, and you can even create resources yourself from scratch. Then just assign them to the courses you want.

Feedback surveys. Gather immediate feedback on what is working and what needs improvement in your courses so you can adjust accordingly, and keep your course members on the path to success. You can tailor individual surveys on all the criteria that are important to you, and re-use these multiple times.

HOW DO I TURN OFF COURSE TOOLS?

You can select which tools to use or hide in each of your courses. Just open Course Management. Select the course you want and choose Course settings from the left hand menu. Then select the Coaching Tools settings tab.

All available tools will be listed. Just click Edit details to change any settings. If you select "Off" for a tool, then your course members won't be able to see that tool in their Course Pad (the relevant page will still be visible to you in Course management).

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i. JOURNALING

WHY USE JOURNALING IN MY COURSES?

Journaling allows you to assign thought-provoking topics for your course members to write about. Journaling has been shown to be effective in a number of regards, including providing focus, improving health, and reaching goals more quickly.

HOW DO I USE JOURNALING IN MY COURSES?

It's easy to pass the benefits of journaling on to your course members in a way that is easy for you to administer and respond to. To use journaling with your course members, all you need to do is create a journal topic and assign it to your course . Your course members will be able to post entries that are private or share them with you. You will be able to comment on any entries, and so will other members of the course, creating a circle of inspiration and support. Your course can have as many journal topics going at one time as you like.

Creating Journal topics

1. You can create journal topics in one of two ways

    a. If you already have a course created, you can go directly to Course Management (under Coaching and Courses). Here you will see a list of your Active courses. Clicking on any course name will drop down a range of tools, including Journal. Click on Journal topics. From this page, you can create and assign journal topics.

    b. Or you can create journal topics from Coaching and Course Tools (also located under Coaching and Courses). Just click on Journal topics in the left hand panel.

2. No matter which page you choose, there will be a button in the main box saying "Add journal topic." Click this button and an area will drop down where you can create your journal topic.

    Choose a title and write a description. This is what your course members will see when responding to the journal, so explain clearly what you would like them to accomplish with this topic. You can also choose to group your journal topics into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

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	Title	Category	Assign date	Last Activity
☐	Track your comfort eating	Health	20 June 2012 Edit	--

▼ View / edit journal topic

Track your comfort eating	*Health*		Edit

Description:

Are you a comfort eater? This can be a major cause of those extra pounds. It's called comfort eating, but does it really make you feel comfortable? This week, journal about your comfort eating. Write about what prompted it, how it made you feel, what you did afterwards.

3. All your journal topics created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing Journal topics

1. You can edit your journal topics by clicking the link View/edit journal topic then selecting Edit. After making your changes, you have two options. If you select Edit all instances of topic, then everywhere you have already assigned the topic, the changes will show up (so use this with caution as it may be confusing if the changes are not minor). If you choose Save a new version of the topic, your edits will create a new version of the topic.

	Title	Category
☐	Track your comfort eating	Health

▶ View / edit journal topic

Assigning Journal topics

1. You can assign a journal topic from the Course Management page. Just click on the course name you want to assign the topic to from the list of your courses on the left-hand side of the page, and then select Journal topics from the drop-down menu.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your course members will be able to see your journal topic.

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	Title	Category	Assign date	Last Activity
☐	Find your inner strength	Self esteem	[ ] 📅	—
	▶ View / edit journal topic		Assign	

What do my course members see from their dashboard?

Your course members will be able to read your journal topic and create entries from the Course Pad in their dashboard. They can choose which privacy setting and whether to allow comments. If they choose "Only me" as the privacy setting, you will be able to see they wrote an entry but not read it.


How do I read and respond to client journals?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

    Click comment below any journal entry to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

    OR

2. You can also read your course members' journal entries from the Course Journal tab under Journal in Course Management.
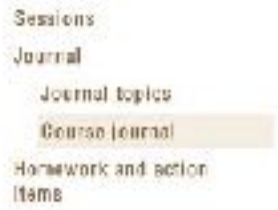
3. To comment, just click the Comment link. Your client can comment back, and possibly other course members too, depending on the privacy settings they selected. This allows for an interactive course experience.

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ii. GOALS

WHY USE GOALS IN MY COURSES?

Goals are a great way to get your course members fired up about achieving success, and motivated towards pursuing their aims. In group coaching, set goals much as you would in individual coaching, to help your clients close the gap between where they are and where they want to be. In other kinds of courses, goals can be equally helpful in aiding your course members to know what they want, creating the motivation to achieve their aims, and creating a clear, actionable path to get there.

HOW DO I USE GOALS IN MY COURSES?

Goal tracking is easy in your courses. If you want to set a goal for your course, all you need to do is create a goal and assign it to the course. Your course members will be able to post reports about their progress towards their goals (either private or shared). You will be able to comment on any entries. Your course can have as many goals going at one time as you like. You can set milestones, a target date and a reward if you like.

Creating Goals

1. Once you have created a course, access Course Management (under Coaching and Courses from the drop-down menu). Here you will see a list of your courses. Clicking on any name will drop down a range of tools, including Course goals. From this window, you can create and assign goals.

2. Click on the button at the top that says "Create a goal." An area will drop down where you can create your new goal for this course.

    Choose a title and write a description. You can provide a target date if you want, or choose to make this an Ongoing goal. You can also add a reward that you encourage your course members to enjoy when they complete their goal. If the goal is fairly large, you might want to provide milestones along the way with optional target dates for these as

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well. These should be arranged in chronological order leading up to the goal target date. You can add as many milestones as you like—simply click Add additional milestone.

Editing Goals

You can edit your goals by clicking the link View/edit goal then selecting Edit. After making your changes, click Save.
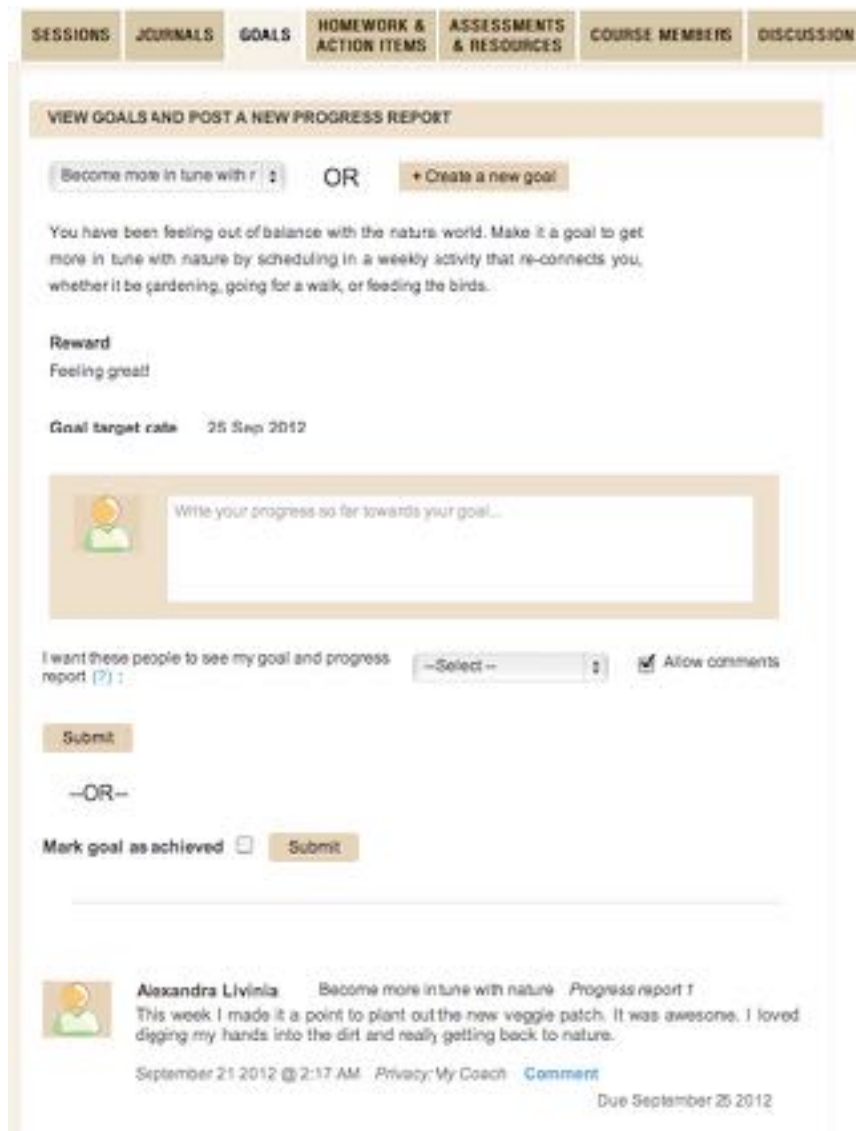
Assigning Goals

Goals are specific to your individual course, so they won't show up in any of your other coaching or courses. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your course members will be able to see your goal.

What do course members see from their dashboard?

Your course members will be able to read your goal and create progress reports from the Course Pad in their dashboard. They can choose which privacy setting and whether to allow comments. If they choose "Only me" as the privacy setting, you will be able to see they wrote and entry but not read it. They might also allow other course members to read and respond to their progress reports, increasing course interactivity and involvement.

How do I read and respond to goal progress reports?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

   Click comment below any goal progress report to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

   OR

2. You can also read your course members' progress reports toward their goal from the same page where you created the goal (the Course goals page in Course management).

3. Your course members will update the status and add details of their progress toward their goal from their dashboard. Click "View goal progress" to review the details your course members have provided about their progress, any setbacks they have encountered, and so on. When they have reached their goal, they can mark it as Achieved, which will be noted in their progress report.

4. To comment, just click the Comment link. Clients can comment back, and this way you can have a productive exchange regarding your clients' goals, keeping them motivated and on track.

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iii. HOMEWORK AND ACTION ITEMS

WHY USE HOMEWORK AND ACTION ITEMS IN MY COURSES?

Setting assignments for your course members to complete is a great way to keep them engaged in your course and getting as much out of it as possible. Help your course members to put into practice the material you are sharing with them by asking them to take action. Homework helps them create new strategies, behaviors and perspectives.

Your course members will report on their homework progress, creating entries you can view and comment on. This creates accountability, giving them the push they need to follow through on their commitments and take action towards reaching their goals. Other course members can also comment, depending on the privacy settings selected by the person posting the report, allowing for a fruitful and dynamic peer exchange.

HOW DO I USE HOMEWORK AND ACTION ITEMS IN MY COURSES?

It's easy to get your course members to follow through on their action steps. All you need to do is create a homework assignment and assign it to your course. Your course members will be able to post reports about their homework progress (either private or shared). You will be able to comment on any entries. Your course can have as many homework assignments going at one time as you like.

Creating Homework assignments

1. You can create homework assignments in one of two ways.

    a. If you have already created a course, you can go directly to Course Management (under Coaching and Courses). Here you will see a list of your courses. Clicking on any name will drop down a range of tools, including Homework. Click on Homework and action items. From this window, you can create and assign homework.

    b. Or you can create homework assignments from Coaching and Course Tools (under Coaching and Courses). Just click on Homework and action items in the left hand panel.

2. No matter which page you choose, there will be a button in the main box saying "Create homework." Click this button and an area will drop down where you can create your homework assignment.

    Choose a title and write a description. This is what your course members will see when responding to the assignment, so explain clearly what you would like them to get from completing the homework. You can also choose to group your homework into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

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3. All your homework assignments created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing Homework assignments

You can edit your homework assignments by clicking the link View/edit homework then selecting Edit. After making your changes, if you select Edit all instances of assignment, then everywhere you have already assigned the topic, the changes will show up, so use this with caution (as it may be confusing if the changes are not minor). If you choose Save a new version of the assignment, your edits will create a new version of the topic.

Assigning Homework assignments

1. You can assign homework from the Coaching Management page. Just click on the client's name you want to assign the homework to from the list of your clients on the left-hand side of the page, and then select Homework and Action items from the drop-down menu.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your client will be able to see your assignment.

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	Title	Category	Assign date	Status
☐	Talk to your boss about that promotion	Career	[ ] 📅	Not assigned
	▶ View/edit homework		Assign	

What does my client see from their dashboard?

Your client will be able to read your homework assignment and create entries from the Coaching Pad in their dashboard. They can choose which privacy setting and whether to allow comments. If they choose "Only me" as the privacy setting, you will be able to see they wrote and entry but not read it.

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How do I read and respond to homework progress reports?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

    Click comment below any progress report to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

    OR

2. You can also read your client's progress toward their homework from the same page where you created the homework (the Homework and Action items page in Coaching management).

3. Your client will update the status and add details of their progress toward their homework from their dashboard. Click "View progress" to review the details your client has provided about their progress, any setbacks they have encountered, and so on. When they have completed their homework, they can mark it as Achieved, which will be noted in their progress report, and change the status of the homework.

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4. To comment, just click the Comment link. Clients can comment back, and this way you can have a productive exchange regarding your clients' action plans, keeping them motivated and on track.

	Title	Category	Assign date	Status
☐	Take every evening off this week	Relaxation and fun	30 May 2012	In progress

▸ View / edit homework   ▸ View progress

Alexandra Livinia   Take every evening off this week   *Progress report 2*

I took the evenings off and played with the kids this week and guess what--I got more done during my work hours! Awesome.

September 18 2012 @ 10:25am   *Privacy: My Coach*   Comment

Alexandra Livinia   Take every evening off this week   *Progress report 2*

I took the evenings off and played with the kids this week and guess what--I got more done during my work hours! Awesome.

September 18 2012 @ 10:25am   *Privacy: My Coach*

Submit   Cancel

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iv. ASSESSMENTS AND FORMS

WHY USE ASSESSMENTS IN MY COURSES?

You can use assessments in your courses to take a reading of where your course members are at, and unearth areas for growth and change. Similar to working with someone individually, you can administer assessments over the span your course.

At the start of the course, you can gather information about where your course members are at currently. You can tailor your course depending on this reading.

Throughout the course, you can administer forms as either a self-assessment tool, or a way for you to deepen your course work. For instance, in a course on Stress Management, you might want to create and administer a Priorities and Time management assessment which allows course members to chart where they spend the majority of their time, and whether it is aligned with their values and priorities. You could then link this to other coaching tools, such as asking them to journal about what they have discovered, or take action in some way.

Assessments and forms are valuable in running your courses because they allow your course members to assess themselves, measure their own progress, and thus become a better partner towards their own success.

HOW DO I USE ASSESSMENTS IN MY COURSES?

You can easily create your own personalized assessments and forms which you can assign to courses. Your course members will be able to post answers to your assessments, and you will be able to comment on their responses.

Creating Assessments

1. You can create assessments in one of two ways.

    a. If you have already created a course, you can go directly to Course Management (under Coaching and Courses). Here you will see a list of your courses. Clicking on any course name will drop down a range of tools. Click on Assessments and resources. From the Assessments and Forms tab, you can create and assign Assessments.
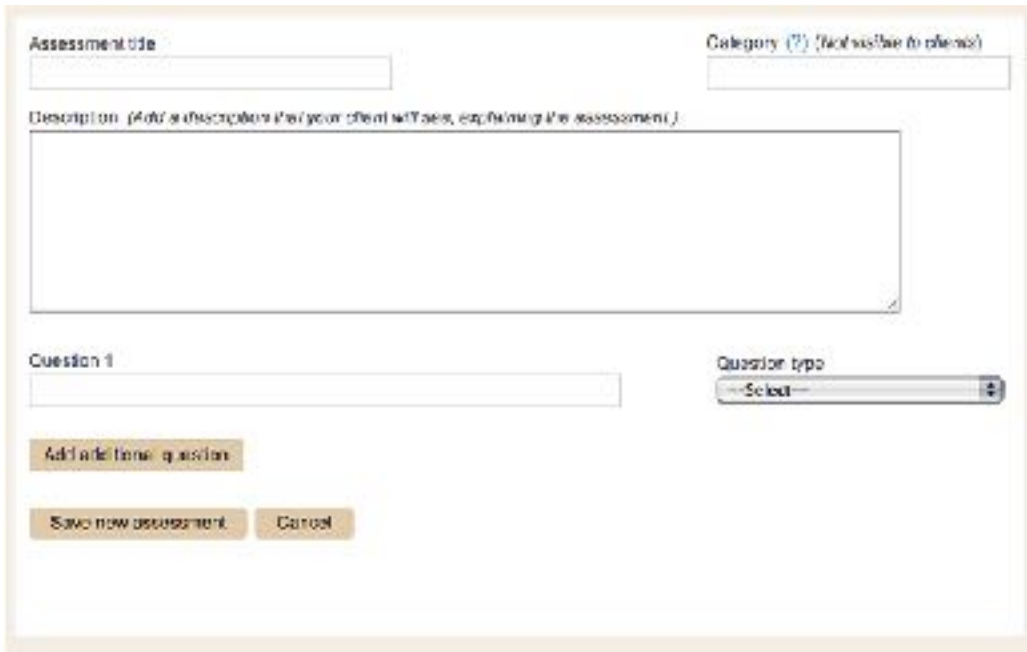
    b. Or you can create assessments from Coaching and Course Tools (under Coaching and Courses). Just click on Assessments and resources in the left hand panel.

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2. No matter which page you choose, there will be a button in the main box saying "Create an assessment." Click this button and an area will drop down where you can create your assessment.

Choose a title and write a description. Give any instructions here that your course members will need for responding to the assessment. You can also choose to group your assessments into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

3. Next, create your questions. These can be in the form of Yes/No, short answer, paragraph or multiple choice. If you choose multiple choice, create each alternative your client can choose from. You can create as many questions as you like—just click on "Add additional question."

4. All your assessments created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing Assessments

You can edit your assessments by clicking the link View/edit assessment then selecting Edit. After making your changes, if you select Save edited assessment, the assessment will be edited with your changes (this option is only available if the assessment hasn't been responded to by anyone yet). If you choose Save new version of assessment, your edits will create a new version of the assessment.
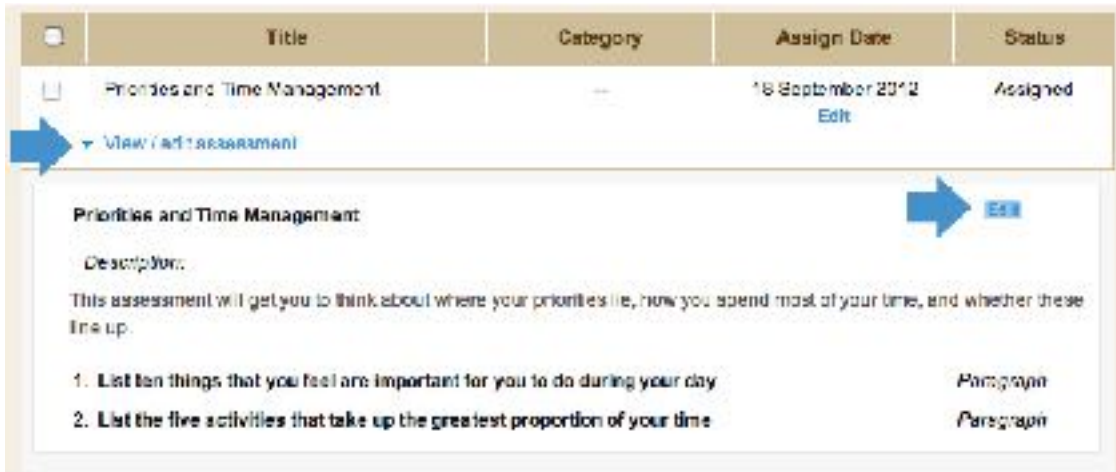
Assigning Assessments

1. You can assign assessments from the Course Management page. Just click on the name of the course you want to assign the assessment to from list of your courses on the left-hand side of the page, and then select Assessments and resources from the drop-down menu.

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your course members will be able to see your assessment.

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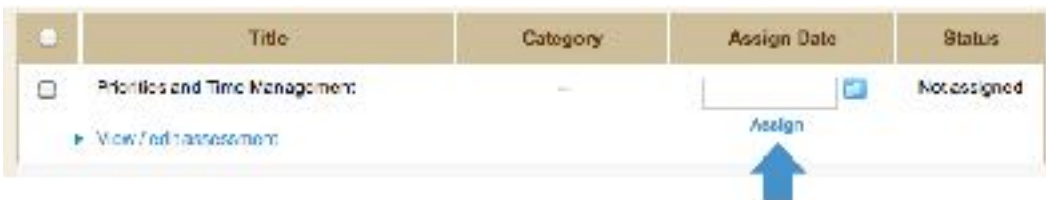
What do my course members see from their dashboard?

Your course members will be able to respond to your assessments from the Course Pad in their dashboard.

How do I view completed Assessments and Forms?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

   Click comment below any assessment to leave a comment. Clients can comment back, and this way you can have a productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

2. You can also read your course members' responses to your assessments from the same page where you created the assessment (the Assessments and resources page in Course management).

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3. Once one of your course members has submitted their assessment, "Pending course members' responses" will change to "View course members' responses." Click on this link and a list of your course members will drop down. Beside each name will display the date the course member submitted the assessment, or will say "Not completed" if they haven't submitted it yet. Click on a course member's name and the questions and answers to the assessment will drop down.
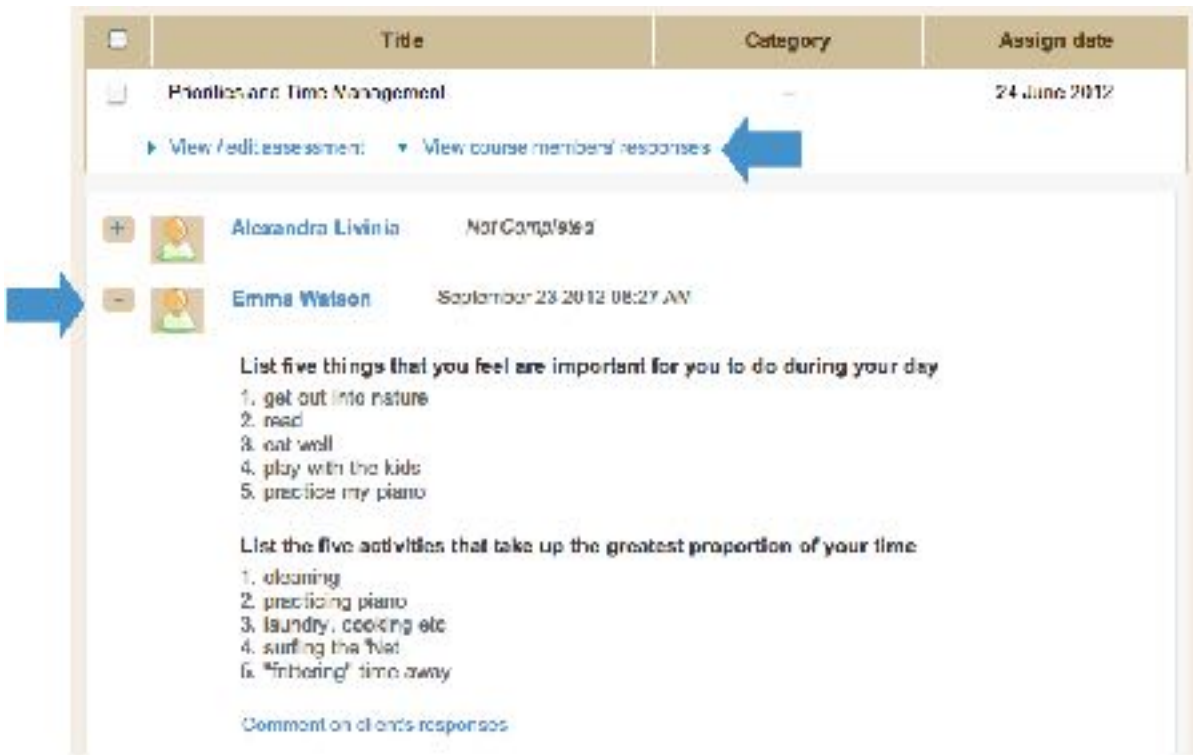
4. You can comment on each course member's responses. Just click the link Comment on client's responses at the bottom of each assessment.

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v. RESOURCES

WHY USE RESOURCES IN MY COURSES?

You may have additional information you want to pass onto your course members that isn't included in any of your E-Modules. You can do this easily from your dashboard. Collect and keep track of the extra resources you send out regularly in one easy location. You can upload any kind of document, and you can even create resources yourself from scratch. Then just assign them to the courses you want.

HOW DO I USE RESOURCES IN MY COURSES?

You can easily upload documents or create your own resources which you can then assign to courses.

Creating and Uploading Resources

1. You can create resources in one of two ways.

   a. If you have already created a course, you can go directly to Course Management (under Coaching and Courses). Here you will see a list of your courses. Clicking on any name will drop down a range of tools.
   Click on Assessments and resources. From the Resources tab, you can create and assign resources.

   b. Or you can create resources from Coaching and Course Tools (under the Coaching and Courses drop down in your dashboard menu). Just click on Assessments and resources in the left panel, and chose the Resources tab.
   hand

2. No matter which page you choose, there will be a button in the main box saying "Create or upload a resource." Click this button and an area will drop down where you can create your resource.

Choose a title and write a description. You can also choose to group your resources into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

3. Next, you can either upload documents or create a resource.

    a. Use the WYSIWYG editor to create a new resource in fully formatted HTML that will be available right in your course members' dashboard. Just enter your text in the box as you would if you were creating a text document. You can choose font styles, sizes, colors and any other features you would with a normal word processor. You can also add links and insert images. You can even create anchors to link different sections within the resource. For advanced layout, use block quotes, bullets, indentation and tables. Hover your mouse over an icon to find out what it does.

    b. Alternatively, you can upload a document to make available to your course members.

4. All your resources created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing resources

You can edit your resources by clicking the link View/edit resource then selecting Edit. After making your changes, if you select Save edited resource, the resource will be edited with your changes. If you choose Save new version of resource, your edits will create a new version of the resource.

Assigning resources

1. You can assign resources from the Course Management page. Just click on the course name you want to assign the resource to from the list of your courses on the left-hand side of the page, and then select Assessments and resources from the drop-down menu. Select the Resources tab.
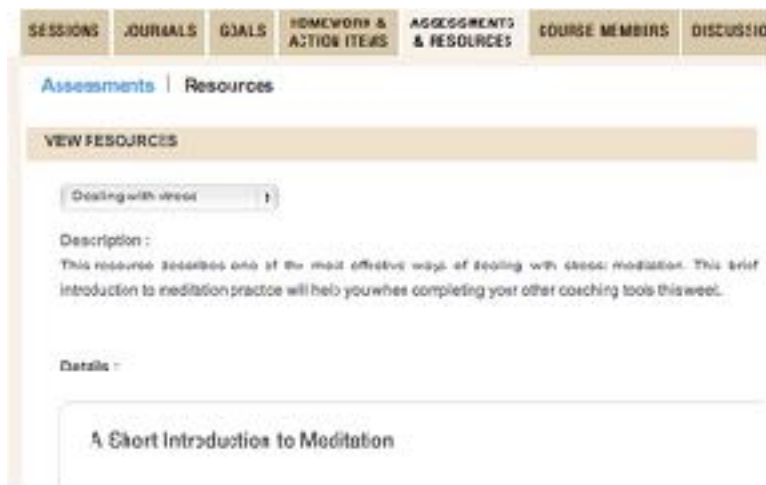

2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your course members will be able to see your assessment.

What do course members see from their dashboard?

Your course members will be able to access your resources from the Course Pad in their dashboard.

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vi. FEEDBACK SURVEYS

WHY USE FEEDBACK SURVEYS IN MY COURSES?

Create and tailor feedback surveys for your courses so you can find out what is working and what needs improvement. You can make surveys as broad or as specific as you require to get the feedback you need to make your courses successful. You can tailor your surveys on all the criteria that are important to you, and re-use these multiple times.

HOW DO I USE FEEDBACK SURVEYS?

You can easily create your own personalized feedback surveys which you can assign to courses . Your client will be able to post answers to your surveys, and you will be able to comment on their responses.

Crating feedback surveys

1. You can create feedback surveys in one of two ways.

    a. If you have already created a course, you can go directly to Course Management (under Coaching and Courses). Here you will see a list of your courses. Clicking on any name will drop down a range of tools. Click on Feedback. From this page you can create and assign feedback surveys.

    b. Or you can create feedback surveys from Coaching and Course Tools (under Coaching and Courses). Just click on Feedback in the left hand panel.

2. No matter which page you choose, there will be a button in the main box saying "Create a survey." Click this button and an area will drop down where you can create your feedback survey.

    Choose a title and write a description. Give any instructions here that your course members will need for responding to the survey. You can also choose to group your feedback surveys into categories for your own private use. You can create additional categories at any time by typing into the field marked Category.

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3. Next, create your questions. These can be in the form of Yes/No, short answer, paragraph or multiple choice. If you choose multiple choice, create each alternative your course members can choose from. You can create as many questions as you like-just click on "Add additional question."

4. All your feedback surveys created for either coaching or courses will be listed in the table so that you can easily assign them to multiple clients and courses. You can sort these to display in any way you like.

Editing feedback surveys

1. You can edit your feedback surveys by clicking the link View/edit survey then selecting Edit. After making your changes, if you select Save edited survey, the survey will be edited with your changes (this option is only available if the survey hasn't been responded to by anyone yet). If you choose Save new version of survey, your edits will create a new version of the survey.

Assigning feedback surveys

1. You can assign feedback surveys from the Course Management page. Just click on the course member's name you want to assign the survey to from list of your course members on the left-hand side of the page, and then select Feedback from the drop-down menu.
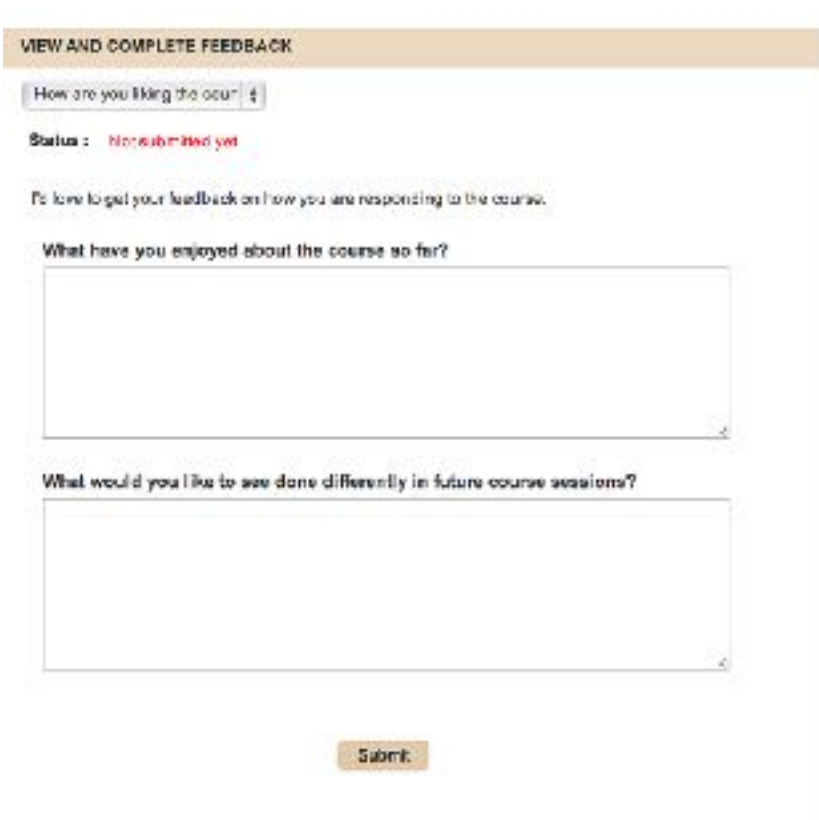
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2. In the column marked Assign Date, click the link Assign or the calendar icon and select a date. This is the date your course members will be able to see your survey.

What do course members see from their dashboard?

1. Your course members will be able to respond to your feedback surveys from the Course Pad in their dashboard.

How do I view completed feedback surveys?

1. Check your Progress Stream. Click on the big green button on your welcome page, or on "Progress Stream" under Coaching and Client Management in the main menu. Here you can see a snapshot of your client's progress, to easily keep track, measure responsiveness, and comment effortlessly. You can also filter easily by client, course, tool type or topic title, so that you can hone in more directly on client progress on a particular issue. You can also search for all entries related to a specific keyword - a truly useful tool to stay engaged and on track in your client's journey!

   Click comment below any survey to leave a comment. Clients can comment back, and this way you can have a

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productive coaching exchange even between sessions (and this is a perfect way to conduct online coaching).

OR

2. You can also read your course members' responses to your feedback surveys from the same page where you created the survey (the Feedback page in Course management).

3. Once one of your course members has submitted their survey, "Pending course members' responses" will change to "View course members' responses." Click on this link and a list of your course members will drop down. Beside each name will display the date the course member submitted the survey, or will say "Not completed" if they haven't submitted it yet. Click on a course member's name and the questions and answers to the survey will drop down.

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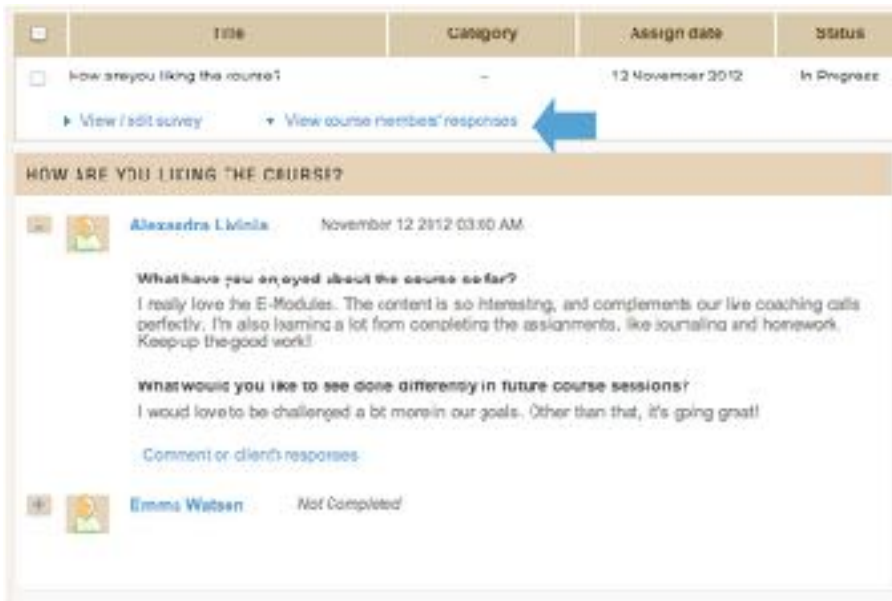
4. You can comment on each course member's responses. To comment, just click the link Comment on client's responses at the bottom of the survey.

	Title	Category	Assign date	Status
☐	How are you liking the course?	–	12 November 2012	In Progress

▶ View/edit survey   ▼ View course members' responses

HOW ARE YOU LIKING THE COURSE?

–   Alexandra Livinia   November 12 2012 03:00 AM

What have you enjoyed about the course so far?
I really love the E-Modules. The content is so interesting, and complements our live coaching calls perfectly. I'm also learning a lot from completing the assignments, like journaling and homework. Keep up the good work!

What would you like to see done differently in future course sessions?
I would love to be challenged a bit more in our goals. Other than that, it's going great!

Comment on client's responses

+   Emma Watson   Not Completed

HOW ARE YOU LIKING THE COURSE?

–   Alexandra Livinia   November 12 2012 03:00 AM

What have you enjoyed about the course so far?
I really love the E-Modules. The content is so interesting, and complements our live coaching calls perfectly. I'm also learning a lot from completing the assignments, like journaling and homework. Keep up the good work!

What would you like to see done differently in future course sessions?
I would love to be challenged a bit more in our goals. Other than that, it's going great!

Write a comment...

Submit   Cancel

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Step 8 : MARKET YOURSELF BY POSTING AN ARTICLE OR A TIP

HOW CAN I MARKET MYSELF TO REACH NEW CLIENTS?

What's the best way to be perceived as an expert in your niche? Write about what you know! The more you can showcase your coaching expertise, the better you are positioned to gain new clients. Write articles and quick tips to demonstrate your expertise within your niche areas and gain a following. All expert contributions are linked to your profile and optimized for search engine visibility.
You'll also earn a higher a Life Coach Hub rating by writing articles and tips, boosting your visibility and attracting more clients.

[SUBMIT AN ARTICLE OR A TIP](#)

WRITING POPULAR ARTICLES

How do I write popular and relevant articles to help show off my coaching expertise?

Articles on Life Coach Hub are all about giving clients and prospective clients a feel for what coaching is by providing them with coaching tips and coaching action items to work on. There are a number of coaching categories you can write about, depending on your niche areas of specialty, in both business and personal coaching.
Here are some tips to making your articles highly readable and shareable. The more visits you get and links you receive to your articles, the more visible and credible you will appear as a coach. This will allow you to attract a following and build your client base for your various products and services.

- Articles have the general spirit of being "coaching tips from an expert coach."

- Choose a great, snappy title that makes people want to read more.

- It's a good idea to use headings and bullet points in your articles. This makes them more readable and interesting.

- Choose topics people really want to read about, share, and link to, and make the articles lively and catchy.

- It's great to show coaching "in action" by incorporating coaching questions within your writing, and asking your readers to take action. Think of writing as though you were speaking directly to your clients—what would you say to them?

- End your articles by asking your readers a powerful question, or asking them to commit to an action step. This allows prospective clients to see how coaching can help create motivation and accountability in their lives. Encourage them to report on their experiences in the comments section, and then comment back, creating a coaching dialogue that can easily turn into a purchase of coaching with you or commitment to try out a free initial consultation.

Gaining a following

Your articles will be listed in your Article Summary page, linked to your profile. This is your own personal blog space. Think about crafting series of articles that generate a following for people interested in your particular niche areas.

- Each coaching category you write about (for instance stress management or work/life balance) is like a blog category within your blog. Feel free to write on a very specific topic that can be categorized according to these coaching niches. So for instance in NLP, EFT and hypnotherapy, topics could be articles such as "How building rapport can help you land that next job" or "Seven steps to mirroring." The more concrete and specific you can be in the coaching advice you give, and the topic you choose, the more your readers will respond.

- A series within a coaching niche category can also be a great way of gaining a following. For instance, you might write a series on stress management techniques, or tips for busy working mothers, and so on.

- Articles such as "10 easy ways to help you [fill in the blank]" and "Top 10 [blank]" are always well liked. Using a hook such as a popular celebrity or trending event which then moves into a related coaching tip can be very shareable and linkable. Predictions and trends are fun (e.g. What's hot and what's not for [fill in the blank] for 2013).
- To build a following, it's a great idea to link to any other articles you have written for this site within your article.

WRITING GREAT TIPS

What are Quick Tips?

Sometimes your readers don't have time to read a full article, but want a quick coaching tip for inspiration. Quick tips are short, insightful coaching tips that help readers out with a quick issue. As with articles, choose a great title that makes people want to read your tip.

SUBMITTING ARTICLES

To submit an article, choose Articles from the drop-down menu under Expert contributions.

1. Select the Submit an Article tab.

- o Enter your article title. Aim for something catchy but also descriptive.

- o Enter a short summary. This will appear on the listings page, so make it punchy so people want to click through to read your article.

- o Enter your article text. You can cut and paste from another document if you wish. It's a good idea to include headings to break up your content. If you do this, highlight the heading and select H1 so that it's identified correctly. Feel free to use bullets and numbering throughout, to make your article easy to read. The content of your article should be original content not appearing on other sites online.

- o Select the category for your article. This is the broad niche coaching area your article belongs to.

- o Write a few tags. These are short keywords that capture main ideas, people, places or things in your article. For instance, if you write an article giving tips for women balancing their careers and home life for the category work/life balance, your tags might be: women, career, children, working mothers.

2. You can either save your article as a Draft and come back to it to work on later, your you can select Submit.

3. View your submission or your draft from the View Articles tab.

Date	Title	Views/status	Action
24 Sep 2012	The Five Mistakes People Make in Relationships	Submitted	
06 Sep 2012	Keys to Better Business Savvy	4709	Share

- ○ Your articles will be listed by title. Click the article title to edit a draft or view your submission.

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