

# The Financial Coaching Roadmap

YOUR STEP-BY-STEP GUIDE TO LAUNCHING AND GROWING A SUCCESSFUL FINANCIAL COACHING BUSINESS.

*Do you dream of becoming a full time financial coach? There's nothing more rewarding than helping people reach a place of financial freedom and finally feel in control of their money.*

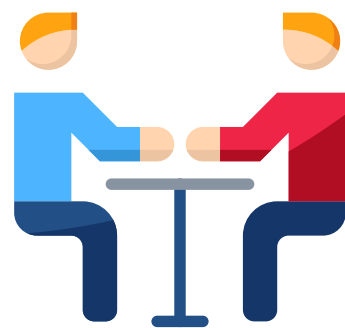
*Often times coaches feel lost when it comes to growing their business, or even feel guilty focusing on revenue. In order to serve the most people, it's essential you dedicate time and energy into growing your business.*

*Are you ready to make a living while serving people? This roadmap is a step-by-step guide to turning your coaching dream into a full time career.*

## Phase 1 Plan

### 1. COACH SOMEONE

Before doing anything else, you must decide if coaching is something you love. Find 2-3 beta clients (could be friends or family members) and coach them for free. Ask for referrals and testimonials as their payment.



### 2. DEFINE YOUR VISION

When do you want to go full time? How much will you need to earn to make this a reality? Create a clear vision for the business and set realistic goals. Then take action and track your progress!

### 3. SET UP YOUR BUSINESS

Select your business name and create your sole proprietorship. It's a good idea to connect with a CPA to make sure you are set up and ready for business. Then, file for an EIN with the IRS here: <https://bit.ly/1P1f7jS>



### 4. CREATE WEBSITE AND SOCIAL MEDIA HANDLES

Purchase the domain for your website and create social media accounts for your business. Even if you don't use them yet, create accounts on all social media platforms so you claim the usernames you want. Try this resource to check name availabilities: <https://namechk.com/>



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## Phase 2 Launch

### 5. CREATE YOUR ELEVATOR PITCH

Develop a 1-2 sentence snapshot of what you do. It can look something like this: "Most people struggle with \_\_\_\_\_. I help people \_\_\_\_\_ so they can feel \_\_\_\_\_."



### 6. SET YOUR PRICING

How much will you charge and how will it be structured? Single sessions, packages, or monthly subscriptions? Consider basing your prices on the value you bring, not per hour or per session.

### 7. CREATE CONSISTENT CONTENT

Start creating content to build awareness. Choose one or two platform to focus on (blogs, YouTube, Facebook, etc). Post content consistently that has a clear call to action at the end.



### 8. CONTACT 100 PEOPLE

Send texts, emails, online messages, or make phone calls to 100 people you know sharing what you do and asking them for referrals. Use your personal social media platforms to announce your business to your friends and family.

### 9. BUILD YOUR NETWORK

Reach out to local professionals and share what you do and express your interest in building a network. Interview them over the phone or over coffee to ensure their values are aligned with yours. Great referral partners are financial advisors, CPAs, counselors, pastors, and life coaches.



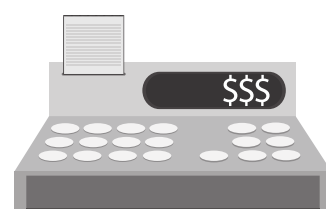
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## Phase 3 GROW

### 10. REFINE YOUR CONSULTATION PROCESS

The consultation is a vital part of your process. Decide what these will look like for you. Will you offer free consultations? How long will they be? What information will you cover? How will it lead to a sale?



### 11. PROSPECT DAILY

Keep your pipeline full of leads. Create a habit of taking daily actions to generate business. Set aside an hour each day for outbound emails, phone calls, and other forms of lead generating contacts. Keep this time sacred in your calendar.

### 12. CREATE AN ONLINE SALES FUNNEL

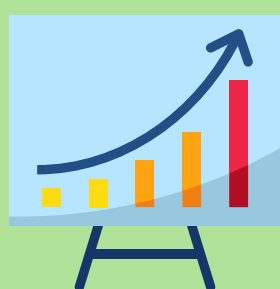
Put a lead magnet on your website to generate leads. Lead magnets can be a PDF, video, or ebook that solves a problem for a potential client in exchange for their email address. Decide how you will use that email address to convert them into paying clients.



## Phase 4 Expand

### 13. START ONE-TO-MANY COACHING MODELS

Expand beyond one-on-one coaching. Conduct group coaching sessions, live workshops, online webinars, or partner with companies to offer financial support to their staff.



### 14. CREATE MULTIPLE SOURCES OF REVENUE

Create online courses, eBooks, membership sites, or other content that you can sell or package with your coaching to increase the value. Consider advertising and affiliate opportunities that might better serve your followers.