

How to Grow Your Coaching Practice Working with Corporates

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THE ALLIGATOR'S BITE

How to Grow Your Coaching Practice Working with Corporates

A marketing cheat sheet for coaches who want to:

Connect with potential clients in corporates

Switch them on to the value of your coaching

WIN business with them

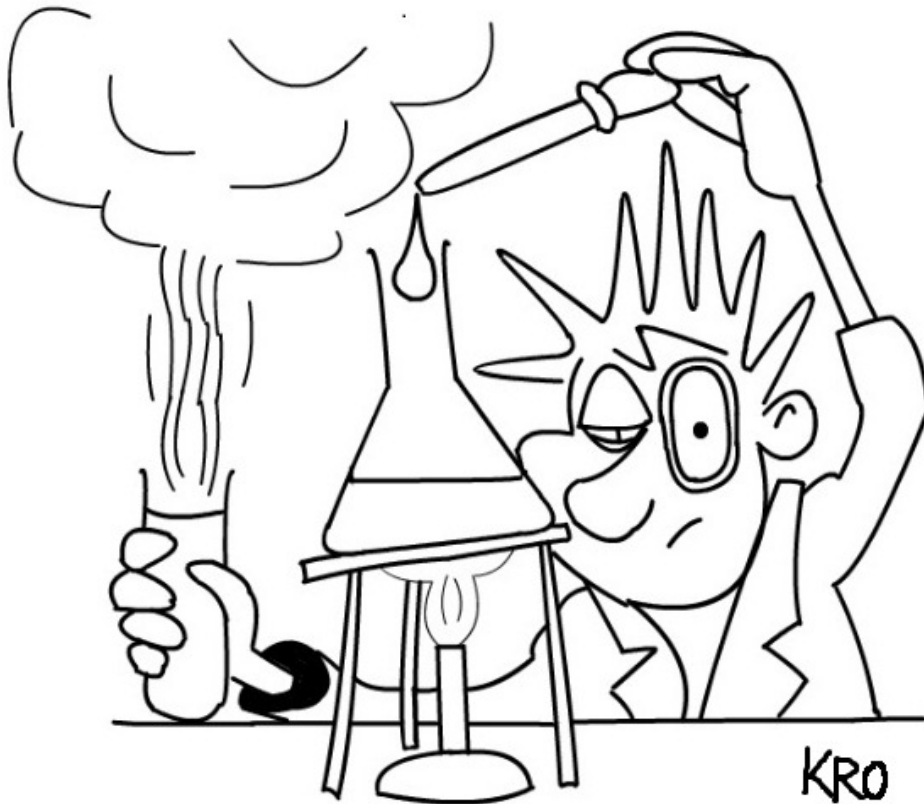
Build long-term relationships with them

WIN further business year on year

by

Kevin Oubridge

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The professor knew that if he could isolate the 'continue to do things that clearly aren't working' gene, he would turn sole-trader marketing on its head

I'm a coach, not a salesperson!

An introduction

Let's cut to the chase.

You've downloaded this cheat sheet because you want to win coaching clients in blue chips.

You haven't downloaded it because you want to learn about marketing and selling, which to your mind is a bit pushy and vaguely unethical.

Good!

It's intended specifically for you.

You're a coach, not a salesperson!

You've spent a number of years learning your trade and getting the appropriate qualifications and accreditations.

You now just want to get on with coaching.

All you've got to do is win some clients.

The 'win some clients' thing

Ahh ...

The 'win some clients' thing, that's not easy is it?

In fact, some people might say it's downright difficult. Certainly, that's what we thought when we started Accelerated Success, our coaching practice, back in 2003.

It didn't stop us trying though.

And we tried pretty much everything, believe me.

For my part, I even tried cold-calling and was relatively successful, managing to set up six meetings with potential clients. None of them came to anything, though, besides which it was the most terrifying and demoralizing work related thing I have ever done.

Which was a big learning point for me:

Don't do stuff that's terrifying and demoralizing!

However, some of the things we tried were more enjoyable, such as networking. You know, actually meeting people and having conversations with them.

If I'm honest, though, this approach wasn't any more successful at winning clients than cold-calling. A big problem for us was that we didn't know what to say to potential clients when we met them.

My second big learning point:

Be clear on what you'll say to potential clients when you meet them.

Another problem for us was that our only plan was to meet people and talk to them ... um ... until they bought some coaching.

Pathetically inadequate and doomed to fail.

We had no notion of distinct steps, where we would focus on moving potential clients to the next step and the next, until they were ready to make a decision on whether they wanted coaching

And so another learning point:

Have a plan! A repeatable step-by-step process you can follow with all potential clients.

Anyway, I'd like to pretend we went on in this fashion, doing stuff and identifying the key learning points from it and moving on, until we understood how to market and sell our coaching.

And, in a sense, that's exactly what we did.

But we also gave ourselves a boost by signing up for a year-long marketing programme, led by one of these US guru types.

Our short cut to winning clients

On the year-long programme we learned loads.

Very quickly.

We put what we learned into practice, and learned loads more as a result.

Which brings me to my last learning point in this introduction:

Don't be scared to invest time (and if necessary money) on learning what you need to learn to win coaching clients.

OK, so now I've come clean. Although, you didn't download this to learn about marketing and selling, you can't avoid it if you continue reading this cheat sheet.

In my defence though, you'll surely agree that to get good at something, first you have to decide you want to get good at it, and then learn, practice, reflect, review and repeat this learning cycle many times.

And marketing and selling are no different. If you want to get good at them you need to get motivated, do some learning and start winning clients.

Wishing, hoping, praying are all options, they just don't work.

And so back to my story.

When we got fed up with wishing, hoping and praying and knuckled down to learning how to market our services we were successful.

We won coaching clients!

We've continued to be successful ever since.

We'd like you to be successful too

We really would.

We know what it's like struggling to get your coaching practice off the ground. A lot of the time it's a series of exciting opportunities, followed by crashing disappointments.

Over and over again.

There's only so much of that a coach can take before you get thoroughly dispirited and start thinking about jacking it all in.

And the worst part of it is that you know you can make a real and very valuable difference for your coaching clients, if only you had some.

You just don't know where to start in getting them.

We've therefore put together this cheat sheet to give you a helping hand. It's basically a whistle stop tour of marketing and selling, aimed specifically at coaches who want to work with corporate clients.

Designed by coaches, for coaches.

My advice is to read it through from start to finish and don't get hung up on the vital information that appears to be missing – hopefully, the gaps will be filled as you read further.

Having read it through, you can go back and pick it over more thoroughly, focusing on what you see as the good stuff and also trying to get to grips with the less inspiring yet still useful stuff.

So, let's get cracking!

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Overview of marketing & selling

What's it all about?

Let's start off with a couple of brief definitions:

Marketing Letting potential clients know what your coaching can do for them.

Selling Getting potential clients to buy your coaching once they understand what it can do for them.

Simple!

So, no matter how complicated it all seems and how overwhelmed you might feel, keep these definitions in mind as you work through this document and when you put what you learn into practice.

Because that's what you're trying to do with your marketing, let potential clients know what your coaching can do for them.

And that's what you're trying to do when you're selling, get potential clients to buy your coaching.

A bit more about marketing

Marketing activity What you do before you meet potential clients, when you first come into contact with them, when you're following up. Even when they become clients.

You are building the relationship, gaining their trust, learning about their situation.

You are sharing information and helping them.

You are NOT trying to sell them anything.

Marketing activity can be anything from emailing a potential client to networking or delivering a free webinar – and there are many, many more ways to market your services.

However, certain activities will get better results than others. Obviously, you want to cut out the stuff that doesn't work and focus on doing the stuff that gets results.

You also need to understand how the different activities work together.

You might, for example, have an information sheet about your service, but when is it best to use it? Do you introduce yourself to someone at a networking event and thrust the sheet into their hand before you've even got their name? Or do you save the sheet until later on in the relationship?

Key issues with marketing, then, are to decide what are the high value activities and when to do them.

And a couple of other things about selling

The sales conversation What you have once you've built the relationship, gained their trust and your potential client understands the value of your service and is ready to make a decision about whether to buy or not.

The initial sales conversation is likely to be brief and can be scripted. However, the actual sale may require a lot of effort on your part and can take days, weeks and even months with corporate clients, as well as requiring a number of continuations of the sales conversation.

Aaaaggh!

I'd have preferred it if you'd left it at 'brief and scripted'.

The trouble is, it isn't like that.

Winning clients in corporates can take a long time – it's to do with their size, complexity and how they communicate. However, the up side is that once you've won your first bit of business, further business in your client company is likely to follow much more quickly (as long as you focus on the right marketing activities at the right time that is).

The key issue with selling, then, is to not get freaked out about it.

Besides which, it's just a series of conversations, where you help your potential client overcome challenges and reach a decision.

Bizarrely, this sounds a lot like coaching.

Marketing, selling & delivery process

I always enjoy organising stuff with a bit of process – it's just easier to see, understand and use.

Here's a top level process for marketing & selling:

First contact

Follow up

Win the business

Deliver the coaching

Build B2B relationships

Win further business

Having read that, you are more than likely spectacularly disappointed.

Why wouldn't you be?

First contact, follow up and win the business skate over the most brutal, terrifying and downright difficult activities a coach is ever likely to be required to undertake – and we've already established you should avoid anything terrifying.

And what's all this about building relationships and winning further business after the coaching?

You only want to learn how to win a coaching client.

I understand that, I truly do.

It's just that I don't want to give you half the story.

So stick with it and things will become clearer.

In later sections, I'll go into much more detail and I'll also introduce you to a fantastic tool for coaches called a Strategy Session.

Strategy Sessions will help you at **first contact** and with your **follow up** and when it comes to **winning the business**.

In addition, they'll help you **deliver your coaching** as well as **build B2B relationships** and **win further business**.

More about the process

The marketing and selling process gives you the key stages from first contact to winning the business. You'll notice the process goes on to delivering the coaching through to winning further business from your client company and picking up referrals.

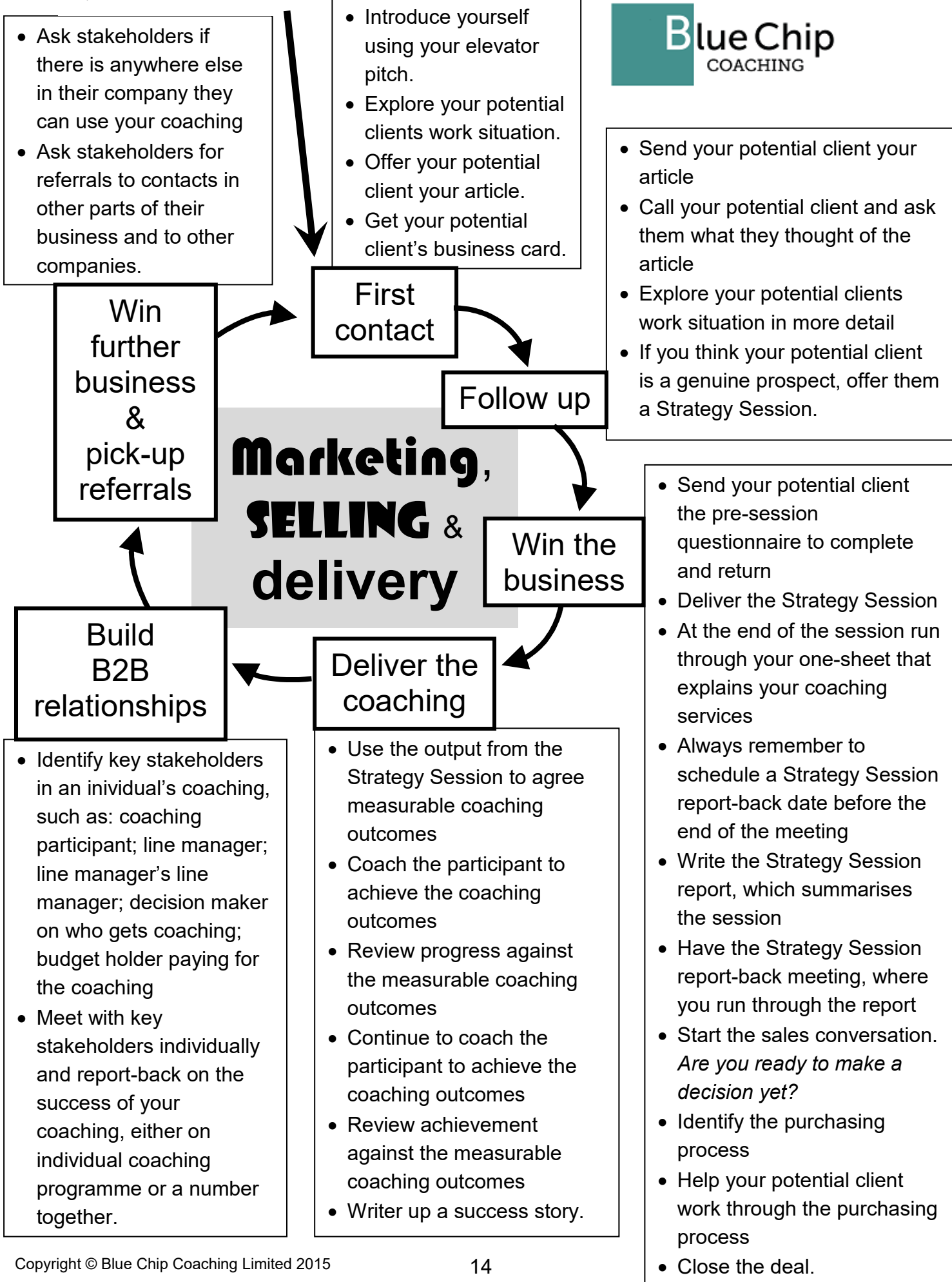
This is because, if you are working in corporates you should be aiming to get most of your business from just a few client companies – it makes sense to build relationships and win further business from your existing client companies, rather than constantly chasing connections in wholly new companies.

Each stage is made up of smaller steps.

The steps are not there for fun!

Each has a purpose, which is to move you on to the next step, until you complete all the steps and make a sale. The diagram below describes the steps at each stage.

START HERE



First contact

Where do you start?

The purpose of the **first contact** stage is to connect with potential clients, find out if they are a genuine prospect and get their contact information to enable you to email and call them at a later date.

It's the start of the relationship.

There are lots of ways of making first contact.

Way too many, in fact.

Here are just a few:

	Online	In person / other	
	Social media	Networking	
	Webinars	Speaking	
	Videos	Texting	
	Blog	Exhibiting	
	Email	Meetings	
	Newsletter	Trade shows	
	Web search	Printed publications	
	Forums	Cold-calling	
	Online conferences	Print advertising	

You can't do everything.

You haven't got the time for one thing, plus some things, like cold-calling, may not appeal to you. And other things, say blogging, you may not be very good at.

In addition, not everything will work for marketing your coaching, particularly if your target market is corporates.

So, for example, print advertising is unlikely to be a very productive route for you. Although getting an article about coaching printed in a trade publication is likely to get more traction.

Social media will work or not, depending on which platforms you choose and your know-how in using them.

For example, Twitter is a great way to connect with loads of people but you have limited capability to find out whether they are a genuine prospect and to build the relationship.

On the other hand, with LinkedIn, you can make fewer but stronger connections.

Both, however, can be a frustrating waste of your time if you don't learn how to use them properly.

Face-to-face networking is a great way to connect with potential clients but only if you network with the right people. That is, people who are in your target market.

If you aren't clear on your target market, or niche, you need to get clear. If you have several niches you want to target, you need to get clear on each. And if you have more than several niches, you probably need to rethink and cut down on who you will target.

One final thing on first contact, don't forget your existing contacts. You already have a relationship with them and you may find your ideal client among them. So don't assume they understand the value of your coaching or that they don't want coaching (by the way, there's more on targeting your existing contacts and how to convert them to paying clients later).

Your elevator pitch

The phone was ringing the other day and I had to run all the way downstairs to take the call:

Hello, I said.

Hello, said the computer generated voice the other end, you could be due compensation for your recent accident ...

I hadn't recently had an accident and it was clearly a speculative sales call, so I hung up.

However, if I'd recently had an accident, maybe it would have got my attention and maybe I'd have stayed on to hear more, presumably about the 'no win, no fee' legal service that would help me get compensation.

Another day the phone rang again. This time I only had to walk from the kitchen:

Hello, I said.

Hello, said the computer generated voice the other end, this is [my bank]. Due to a number of suspicious transactions we have cancelled your debit card. Please call 0800 123 to ...

I have to admit I was wary of the call but wrote the number down anyway – turned out to be legitimate and my bank was safeguarding my money for me.

My point is that this call got my attention because it connected with something that was important to me, my finances. Had it turned out to be a con and not my bank, it would have lost my attention very quickly but, for a short while at least, it had me.

And that's what you need to do with your potential clients. You need an elevator pitch that will grab their attention, if only briefly, enabling you to engage in a marketing conversation with them.

Remember, the purpose of the first contact stage is to connect with potential clients using your elevator pitch, find out if they are a genuine prospect and get their contact information to enable you to email and call them again. Keep it simple and follow the Target, Problem, Outcome model below.

Target, Problem, Outcome model

Target The people you want to work with and the companies they work for.

- e.g.
- (a) *I work with high performing leaders in global ICT companies ...*
 - (b) *We work with operations managers in automotive manufacturing companies in UK & Europe ...*
 - (c) *We work with sales staff in German office furniture retailers ...*

- Problem** The problems people in your target market face.
- e.g.
- (a) *... who are driving change for business growth and are dissatisfied with the rate of change. They are constantly dragged into operational issues which prevents them focusing on the high value strategic stuff that makes a real difference to business results.*
 - (b) *... who feel held back by the need to balance quarterly targets and other short-term requirements with longer term issues around product quality, production line performance and communication.*
 - (c) *... who have great products but lack the project and stakeholder management skills to win high-end, long-term business with client companies.*
- Outcome** The outcomes people in your target market want.
- e.g.
- (a) *What they want is to upskill their team, improve their delegation and have the time and head-space to step back from the day-to-day to think 'big picture' and execute more strategically.*
 - (b) *What they want is to improve communication and performance to drive up quality and reduce their stress around short-term targets.*
 - (c) *What they want is to improve their project management skills and learn how to identify and work effectively with client stakeholders to increase sales and improve long-term business results.*

Ask don't tell

Introduce yourself using your elevator pitch then ask them about their work situation:

What's your role?

What are your challenges?

What outcomes do you want?

Show interest in the answers your potential client gives you and establish yourself as a good listener.

Why? Because it gives your potential client time to speak, to think about her work situation and the challenges she faces, and also about what she really wants. Something she probably doesn't get the chance to do normally.

Also because it gives her a taste of what your coaching would be like.

And finally because you're a coach, so play to your strengths. Ask questions and listen.

Your article

So, you've got the attention of a potential client by using your elevator pitch. You've asked her about her work situation as a way of qualifying her (deciding if she would benefit from your coaching).

Now what?

Well, if she is a suitable candidate for coaching, you need to get her contact information. You could ask her for a business card – but maybe you feel uncomfortable about doing this – or you could hand over your

business card – she might reciprocate but she might not. Or you could say:

*I've written an article, **Ten Ways Corporates Benefit from Coaching**, which I think you'd be interested in. It's about how organisations like yours are using coaching and the results they get. If you give me your card I'll send you a copy.*

When she gives you her card say:

And would you mind if I call you next week to get your reaction to the article.

What you need now of course is an article to send her.

So write one!

It doesn't have to be long or with lots of fancy diagrams or backed up by academic research. It just needs to be of value to your potential client and readable.

It could even be a case study or collection of case studies of previous clients you've helped. And if you're struggling to decide what your previous clients got out of working with you, set up some meetings and ask them.

If you don't think you can write a usable article, try anyway. It's a great way to understand exactly what it is your clients get out of your coaching and will help you with nailing down your elevator pitch.

If you really can't write a usable article, pay someone else to do it.

What you're looking for is something of value you can offer potential clients that educates them on the benefits of your coaching.

Follow up

What do you say to potential clients?

It's a tough one isn't it.

All the marketing specialists are telling you to follow up, like it's obvious how you do that.

It's anything but though.

It's easy enough to memorise your elevator pitch and trot it out when necessary, but following up after you've sent your article is a bit scary.

I mean, it feels like you're just hassling someone for a sale.

The thing to remember is, you are helping your potential client understand what your coaching can do for her – coaches are good at helping others, so you should be good at it.

Plus, you can follow a script for this part of your marketing too.

Making the call

It's tempting to email your potential client.

It's easier, less intrusive, not as frightening as calling.

Trouble is it doesn't work.

Not on its own.

So call your potential client and keep trying until you get through to her.
Then say:

Hi [name]

It's [your name] here. We met at [event] / online via [social media platform]. Did you receive the article I sent you?

What did you think?

How does the content relate to your situation?

Tell me more?

Clearly, there's more to it than that but you can write a few questions to ask on the call and use those as well.

At the end of the conversation say something like:

From what you've told me it sounds as though a Strategy Session would be of benefit to you. A Strategy Session is a free service where you get the chance to discuss your vision for your part of the business, the challenges you face and what you need to get better at to add most value.

How does that sound to you?

Again, script this how works best for you.

But do script it. Learn your script. And use it.

You'll get more comfortable with practice and you'll also be able to tweak it as you go, to ensure it works for you and your potential clients.

Targeting your existing contacts

I mentioned this earlier but I'll say it again, you should target your existing contacts first.

Why wouldn't you?

You already have a relationship, so first contact and most of follow up are already complete. All that's left to do is offer your existing contacts a Strategy Session.

Give them a call or set up a half hour catch up meeting. Simply say:

I'm trying out a new coaching tool called Strategy Sessions, which is a free service where you get the chance to discuss your vision for your part of the business, the challenges you face and what you need to get better at to add most value. Participants typically get a deeper understanding of their work situation and often have significant insights.

Would you mind if I practised using the tool with you?

The worst that can happen is they decline your offer.

However, if they accept, you'll learn a huge amount about how to deliver a Strategy Session, which is a great way to convert prospects to paying clients.

In addition, you might win some business from doing this.

That's how we started, we offered an existing contact a Strategy Session so we could practice using the tool, and he was so impressed he commissioned a full coaching programme off the back of it. We are still working in the same client company more than 10 years later, having used Strategy Sessions to win further business following the initial engagement.

Win the business

More about Strategy Sessions

Strategy Sessions give your potential client an experience of your coaching. They add huge value for her, leaving her wanting more, which means they also add value for you. This is what you want, your potential client understanding the difference your coaching can make for her and her business, and itching to pay for a full coaching programme.

Once your potential client has agreed to a Strategy Session you should follow these steps:

Send your potential client a pre-session questionnaire

Deliver the Strategy Session

Report back

The pre-session questionnaire

The pre-session questionnaire will get your potential client thinking about her work situation and she'll have to put some of her thoughts on paper. This can be insightful, challenging, stretching, a dead loss, all sorts. Whatever her reaction, the completed questionnaire will give you valuable material to work on in the Strategy Session itself.

You can use the following questions or develop your own:

1. What's the purpose of your part of the business?

2. Describe how you fit into the organisation, including who you report to, the size of your team, and budget / revenue generation responsibilities.
3. What's your vision for your part of the business?
4. What are your key objectives for the next 12-18 months?
5. What are the 3 or 4 most important and challenging areas of your role in fully achieving these objectives?
6. What would it be most important for you to get better at, to significantly improve performance in these areas? Try to select something that will extend your capability as a leader / key player, rather than something technical you can accomplish by learning a new skill.

Ask your potential client to complete and return the questionnaire at least 48 hours before her Strategy Session.

If she fails to do this don't be tempted to skip this step, rather reschedule the Strategy Session, giving her more time to complete the questionnaire.

When she does return the questionnaire, go through it and write out additional questions you will ask in the session itself, digging deeper into your potential clients' responses.

Delivering the Strategy Session

The Strategy Session is 90 minutes long, which is 75 minutes going through the questionnaire and 15 minutes for you to tell your potential client a bit more about your coaching.

In the session go through your potential client's questionnaire, digging deeper into her answers.

You're a coach, so this bit should come naturally to you.

The main thing to remember is you need to get through all the questions, so keep an eye on the time.

Make notes on the key points discussed as you go.

After you have gone through the questionnaire, tell your potential client about your coaching services.

We use a 'One-Sheet' for this, which is the front and back of a sheet of paper that describes a coaching programme, the value of each element of the programme and how we deliver that value.

At the end of the Strategy Session schedule a report back meeting date with your potential client.

The report back

After the Strategy Session use your notes to write up a report, a brief summary of the Strategy Session discussion. Send the report to your potential client no later than 48 hours after your meeting – it's still fresh in her mind and keeps momentum going.

In the report back meeting go through the report, checking that your potential client understands and agrees with the content.

At the end of the report back you need to start the sales conversation. Something like:

Are you in a position to make a decision on whether to go ahead with a full coaching programme?

Other useful questions here are:

What needs to happen for you to make a decision?

What's the decision making process in your organisation?

How can I help you get a decision?

After the meeting you need to keep in touch and help your potential client move through the decision making process.

Of course, sometimes your potential client will be the decision-maker and budget holder and she'll commission a coaching programme on the spot. In which case, you need to give her information about the start up process, perhaps referring to your 'One-Sheet' again.

Deliver the coaching

This is what you've trained for

When delivering your coaching to people in corporates it's a good idea to focus on the process of delivery as much as the coaching itself. Get the process right and you maximise the value of the coaching to the coaching participant, line manager and wider business, as well as benefitting you for marketing purposes.

The exact process you follow is down to you and what your clients want and will find most useful. The following key elements work well:

- Deliver your coaching by the programme with a distinct beginning, middle and end
- For the beginning of your coaching programme, use the output from the Strategy Session to nail down measurable outcomes for the coaching programme. Where appropriate and possible you should involve the coaching participant's line manager at this stage. This ensures alignment between the coaching outcomes and wider business objectives
- For the middle of your coaching programme, coach as you've always coached, either face-to-face, by phone or both
- For the end of your coaching programme, measure the results you get against the outcomes you agreed at the beginning. Where appropriate and possible you should involve the coaching participant's line manager at this stage also. This ensures the results you get are accurate and credible

An example of a coaching programme

The diagram on the following page gives the structure of the coaching programme we use with our corporate clients.

The first part of our coaching programme includes the Strategy Session because, although we don't charge for that bit, it's where the coaching participant uncovers the agenda for her coaching.

We have 3-way start up, involving the line manager, depending on the seniority of the participant. At 3-way start up the coaching participant and line manager, facilitated by the coach, discuss the outcomes the participant will be coached to achieve and their links to business objectives.

We then nail down coaching outcomes and how we will measure success with the coaching participant at outcome setting, followed by 7 to 10 months coaching to achieve the agreed outcomes.

At the end of the coaching we measure success, first with the coaching participant, and then we link back to business objectives in the 3-way final review with the line manager.

We use report back meetings to review summaries of discussion and also to ask for further business and referrals.

The business value meeting, 4-6 months after programme close, provides the coaching participant with the chance to review her ongoing achievements and us with a further marketing opportunity.

We have found coaching participants, line managers and other stakeholders enjoy and value this structured approach.

It also works very well for us for marketing purposes.

ACCELERATED SUCCESS PROGRAMME



Winning further business

Not wasting what you've already got!

Success breeds success.

But only if you proactively set out for it to do so.

So, write up the results you get as a success story and ask the coaching participant and line manager if you can share the success story with other named stakeholders in the client company (such as line manager's line manager, decision maker on who gets coaching, budget holder who pays for the coaching and human resources) to promote your coaching and see if there is anywhere else the company can use it.

Also ask them if you can use the success story anonymously in your marketing to other companies.

Success stories are great marketing currency.

Just remember to focus on your existing client company **FIRST** when trying to win new business.

You have already done the hard yards of making **first contact** and are most of the way through **follow up** as well. This means you can shorten the sales cycle and win more clients more quickly and easily in your existing client company than starting from scratch and trying to break into a new company.

The trick is to identify the key stakeholders in the coaching and build the relationship with each of them. Don't be afraid to give them a call and set up a half hour catch up meeting.

Using success stories to win more business

Definitely first on the list is to:

- Meet up individually with the key stakeholders you have identified in your client company and take them through the success story or stories if you have more than one.

Ask them if they know of anyone else who might benefit from your coaching. Tell them that you can offer Strategy Sessions to anyone who might be interested and that you will report back to them after the session.

Here are some other ways you can use your success stories:

- You can ask stakeholders for referrals to others they know in their company who might be interested in your coaching, either for themselves or their teams – be careful here though, as not everyone is comfortable in providing referrals in this way
- You can also ask them for referrals to others they know in other companies who might be interested in your coaching – again, be careful here, as not everyone is comfortable in providing referrals in this way
- Write them up and put them on your website or use them in other marketing material
- You can even write one or a number of your success stories up into a case study for the article we discussed earlier in this cheat-sheet (see First contact, Your article)

What to do next

Hopefully, you're excited by at least one thing you've read but you're also wondering what to do next.

In the short term (as in starting today), my suggestion is to think about your target market and have a go at nailing down your elevator pitch.

Then think about how you're going to connect with potential clients and start trying your elevator pitch out.

You could also, make a start on writing an article – whether or not you use it for your marketing, you'll learn a lot of useful information about what to say to potential clients and the value your service brings.

Longer term (as in the next few weeks) my suggestion is to offer at least one existing contact a Strategy Session and see how you get on.

In general, I suggest you just try stuff out. Then review how well it went and try again. Until you win some clients and start getting comfortable with doing so.

That's it. Good luck and ...

Enjoy your marketing!

Kevin Oubridge
Blue Chip Coaching Limited

PS Please feel free to email me any comments or questions you have at kevin@bluechipcoaching.co.uk and [connect with me on LinkedIn](#).