THE SUCCESSFUL C O A C H

Insider Secrets to Becoming a Top Coach

> Terri Levine Larina Kase Joe Vitale



John Wiley & Sons, Inc.

THE SUCCESSFUL C O A C H

Grow and manage your coaching practice.



clientc@mpass

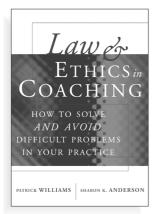
PRACTICE MANAGEMENT SOFTWARE FOR LIFE, BUSINESS, AND EXECUTIVE COACHES

Client Compass Software provides a fast and easy solution for managing client intake, recordkeeping, billing, and practice building. Easy to learn, this revolutionary software package was created specifically for busy coaches like yourself who are looking for a business management solution that is both complete and portable.

With Client Compass Software you can:

- Use our unique call timer which automatically tracks and records client sessions
- Manage all your client records
- Perform client intake and manage client sessions
- Carry out assessments
- Keep track of client appointments
- · Grow your coaching practice

For more information, visit Client Compass on the web at www.clientcompass.com. Or, call one of our Client Compass reps toll free at **1-866-888-5158**.



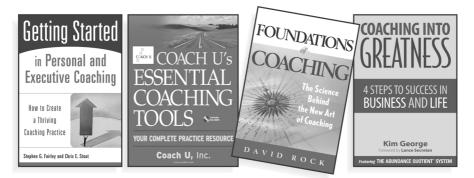
Law e) *Ethics in Coaching* presents the first comprehensive look at ethical and legal issues in coaching. From coach-client conflicts to conflicts of interest, from assessments to informed consent, the authors detail the breadth of ethical quandaries in coaching and provide highly practical advice for avoiding problems-and for solving them. With contributions from leaders in law, ethics, and coaching, *Law e*? *Ethics in Coaching* is both an innovative professional reference and an unparalleled textbook for coaching programs.

ISBN: 0-471-71614-6 • \$40.00

To order, call 1-877-762-2974 or online at www.wiley.com/psychology. Also available from amazon.com, bn.com, and other fine booksellers.



Must-Have Resources for Coaches



Getting Started in Personal and Executive Coaching: How to Create a Thriving Coaching Practice STEPHEN G. FAIRLEY AND CHRIS E. STOUT 0-471-42624-5 • \$24.95

Packed with hundreds of proven strategies and techniques, *Getting Started in Personal and Executive Coaching* is a nuts-and-bolts guide covering all aspects of the coaching business with step-by-step instructions and real-world illustrations that prepare you for every phase of starting your own coaching practice.

Coach U's Essential Coaching Tools: Your Complete Practice Resource COACH U, INC. 0-471-71172-1 • \$50.00

Coach U's Essential Coaching Tools is a handy book and CD package that includes both self- and clientassessment tools and worksheets/exercises to aid you in working effectively with your clients, as well as proven marketing and business development materials.

Foundations of Coaching: The Science Behind the New Art of Coaching DAVID ROCK

0-471-74585-5 • \$55.00

Foundations of Coaching integrates discussion of neuroscience, psychology, anthropology, organizational theory, and more into a fully realized, sophisticated understanding of what coaching is while also creating a practical, hands-on template for real-world coaching practice.

Coaching Into Greatness: 4 Steps to Success in Business and Life KIM GEORGE 0-471-78533-4 • \$39.95

Coaching Into Greatness provides you with a clear, understandable, and concise process you can apply to your life and the lives of your coaching clients or employees. The Abundance Quotient System[™] consists of four steps—awareness, acceptance, consistent action,

and authenticity-toward unlocking the inner genius.



To order, call 1-877-762-2974 or online at www.wiley.com/psychology. Also available from amazon.com, bn.com, and other fine booksellers.

THE SUCCESSFUL C O A C H

Insider Secrets to Becoming a Top Coach

> Terri Levine Larina Kase Joe Vitale



John Wiley & Sons, Inc.

This book is printed on acid-free paper. ⊗

Copyright © 2006 by John Wiley & Sons, Inc. All rights reserved.

Published by John Wiley & Sons, Inc., Hoboken, New Jersey. Published simultaneously in Canada.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, Inc., 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600, or on the Web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at http://www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is sold with the understanding that the publisher is not engaged in rendering professional services. If legal, accounting, medical, psychological, or any other expert assistance is required, the services of a competent professional person should be sought.

Designations used by companies to distinguish their products are often claimed as trademarks. In all instances where John Wiley & Sons, Inc. is aware of a claim, the product names appear in initial capital or all capital letters. Readers, however, should contact the appropriate companies for more complete information regarding trademarks and registration.

For general information on our other products and services please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books. For more information about Wiley products, visit our Web site at www.wiley.com.

Library of Congress Cataloging-in-Publication Data:

Levine, Terri.

The successful coach : insider secrets to becoming a top coach / by Terri Levine, Larina Kase, and Joe Vitale.

p. cm. ISBN-13: 978-0-471-78996-3 (pbk.) ISBN-10: 0-471-78996-8 (pbk.) 1. Personal coaching — Practice. I. Kase, Larina. II. Vitale, Joe, 1953– III. Title. BF637.P36L485 2006 158'.3-dc22 2006003343

Printed in the United States of America.

10 9 8 7 6 5 4 3 2 1

For my husband, Mark, who always believes in my dreams and is my biggest fan — Terri

To John, my soon-to-be-husband and the constant ray of light in my life – Larina

To my love Nerissa—Joe

Contents

Ack	nowledgments	xi
Intr	roduction	xiii
	PART 1: GETTING READY TO BECOME A TOP COACH	
1	I Don't Know! Do I Want to Be a Coach or Something?	3
2	What's Stopping You from Being a Top Coach?	13
3	Conquer Excuses that Stand in Your Path	27
4	Thinking Like a Top Coach	35
5	Getting Started and Successful Studying Strategies	47
6	Focused on Your Goal	61
7	The Power of Self-Motivation	73
8	Interpersonal Support Helps You Soar	85
9	Beat Avoidance and Procrastination	97
	PART 2: MARKETING SECRETS OF TOP COACHES IN ACTION	
10	Setting Up Your Coaching Business	109

	• •	-	
11	Making Marketing Fu	n	119

Contents

12	Effective Proposals, Projects, and Joint Ventures	131
13	Larina Kase's Tips for Successful Strategic-Referral Partnerships	141
14	Joe Vitale's Secrets to Mastering Internet Marketing	155
15	Making the Most of Limited Resources	163
16	Terri Levine's Top 10 Marketing Secrets	177
17	Putting It All Together	197
Recommended Resources		201
Gifts to Help You Become a Successful Coach		207
Іпде	x	211

Acknowledgments

I'd like to thank my husband, Mark, who gives me the space and freedom to be me and then fully loves me for who I am. Also my parents, Helen Levine and Walter Levine, who filled me high with selfesteem right from childhood, and all my amazing relatives (the Morgenbesser clan), especially my sister Lynn Boruchowitz, who seems to think I can do anything. My closest friends, Shannon and John Cane, Elaine Krinsky, and Betsy Lechner, who are always there for me. I'd also like to thank my mentors who taught me about business, marketing, and coaching, Eileen Seed, Thomas Leonard, Scott Hallman, Chet Holmes, Larry Loebig, and Sharon Teitelbaum.

To my wonderful business associates, Pat Zickefoose, Donna Eliassen, Sharon Wilson, Mary Heidkamp, Sue Guiher, Stefanie Hartman, Heather Lynn Jergens, Jan Carroll, and my nieces who work with me in my business, Sarah Lateer and Rachel Muraca, I simply could not accomplish any of what I do without you. You are all such superstars, and I am so appreciative of your creative talents (and what a treat to have my nieces working with me!).

I'd like to give huge thanks to my wonderful coauthors, Larina Kase and Joe Vitale. Joe has been one of my key mentors over the years and is a copywriting and marketing genius, and I feel honored to cocreate with him. Larina is an amazing woman, passionate and inspiring coach, and expert in knowing what the coaching market needs. These two fine people are a joy to play with.

Finally, I want to thank the Creator for giving each human being the power to create the life and work they desire and for the blessed life I am living.

Introduction

In my "other life," I was a high-flying executive earning a ridiculously high salary. As far as everyone I knew was concerned, I had it all, yet I was deeply unhappy. I was working so hard that I didn't have a life. I was stressed. I was tired. On top of this, I felt terribly guilty. How dare I, a wealthy and successful career executive, complain when so many others out there had no jobs or worked equally as hard as I did for much less money. I felt very ungrateful, but I couldn't shake the feeling that this wasn't for me. Life wasn't meant to be this way, and one day I not only realized but also accepted that all that money I was earning meant nothing because it couldn't buy the one thing I wanted and needed most.

I hired a life coach, and through the coaching process discovered why I felt the way I did and what I wanted most to be doing. Life was ticking by, and I wanted and needed to experience more before it was too late. I wanted to achieve my dreams. My desire has always been to help others, and I was so enthralled and excited about my own coaching experience and knew how effective and right it was that I wanted to help others this way, too. Of course, it wasn't only the desire to switch careers that motivated this change. I wanted to work my own hours when it suited me, be my own boss—accountable to nobody else with all the freedom that entails—and I wanted to continue to earn good money. I wanted to earn my living doing something I loved. Well, doesn't everybody? Do we really want to get out of bed early in the morning and go and do something we hate and spend all day, and then some, doing it? Puh-leeze!

INTRODUCTION

When I walked away from my six-figure income and said, "I am going into business for myself and I'll be working from home," people were shocked. My family and friends thought I had lost all my marbles and tried to talk me out of it, especially when they learned just what the business was that I was going into: coaching. You have to understand, in the early days of coaching, many thought it was just a fad and would soon pass. (I guess you could say I'm now having the last laugh!)

Everyone was convinced I was crazy and doomed to failure, poverty, and regrets. But this was my dream, and I had every right to pursue my dream, my way, in my life. I started in a coach-training program and got personal training from the coaching legend Thomas Leonard. I was very happy the day I sat and passed my examination, and when I began my new career, I attracted 30 clients in 15 days! And that was just the beginning!

I pushed myself beyond my limits and ventured far outside my comfort zone, discovering just how much I was capable of, and went on to attain the much-coveted master certified coach designation. But I didn't stop there! I stretched further, again amid cries of concern from well-meaning family and friends, and started my own coachtraining program to teach others to become qualified, certified personal and business coaches. And I didn't stop there, either. I went on to found Comprehensive Coaching U, the coach training program for professionals, and the Coaching Institute, training life coaches around the world, and authored Amazon.com best seller *Work Yourself Happy*, which was followed by *Coaching for an Extraordinary Life, Create Your Ideal Body*, and another Amazon.com best seller, *Stop Managing, Start Coaching*. I also became a popular keynote and public speaker. I was, and still am, happier than a pig in mud! But I must tell you, I'm not naturally brave, yet look what I've achieved! You can do it, too!

And now, instead of being called crazy, I'm called other names. My clients have nicknamed me the "wisdom wizard," and a couple call me the "queen of coaching." What I do may be different, but it works! I am now privileged and honored to have the reputation of being known as one of the most successful coaches in the United States today, and I have attracted an international following that continues to delight me. My circle of friends, acquaintances, and associates widens with each passing month, and they live in places like the United Kingdom, Norway, Sweden, Denmark, Germany,

INTRODUCTION

France, Turkey, Japan, Singapore, Australia, and New Zealand. This profession has truly blessed me in more ways than one!

And to think I may never have experienced this great joy in living! It took just one decision to hire my own coach, way back then, to turn my life around in ways I never dreamed would be possible.

Of course, it certainly helps that I have a background in business and marketing, and, yes, these skills certainly pushed me forward quickly when I was building my own coaching business. I left the corporate world with a track record of growing million-dollar businesses, so in many respects, I had a head start. And this is why my classes fill very quickly whenever I announce I am doing a marketing seminar. Naturally, other coaches want to know how I did it and continue to do it!

Nowadays, I am a nationally recognized authority on creating greater business and personal success, and I'm featured regularly in the media and on the Channel 10 NBC news in Philadelphia as a coaching expert. I still live in Pennsylvania, and when I'm not coaching, training, speaking, writing, or away on vacation, I *love* to race formula Dodge cars! (So okay, maybe I am still just a *little* crazy!)

And as to the question, why have I teamed up with Larina Kase and Joe Vitale to write this book? The answer is simple. The three of us have seen so many great coaches unable to make a great living as a coach or attract all the clients they wanted. We want *you* to enjoy what we're enjoying—success, happiness, freedom. You see, we know what it's like to yearn for something different but be too afraid to change and step into the unknown. We know how easily you can be a successful coach once you learn how and have expert coaches and mentors assisting you.

With this book, we hope to help you understand what is holding you back in your life! We want to help you identify the barriers and inner blocks stopping you from having the life you dream of, the freedom to do work you love and be paid for it. We want you to stop dreaming and start achieving!

To your success!

Terri Levine, CEO The Coaching Institute

P.S. Visit me on my web site at http://www.TerriLevine.com.

PART 1

Getting Ready to Become a Top Coach

I Don't Know! Do I Want to Be a Coach or Something?

Happy are those who dream dreams and are willing to pay the price to make them come true.

-Anonymous

"Coaching? It Sounds Great . . . but What Is It? Is It for Me?"

It's the fastest growing business in the world today. It's quite possible you've been toying with the idea of becoming a full- or part-time coach or consultant of some kind, or you've already completed your training and are daunted by the task of actually building a successful business. Or maybe you have already begun and want to know how to make business boom. Unlike other home-based businesses, this one is very rewarding, and we're not just talking about financially, although it certainly is that, too!

So, are you wondering if the coaching business is right for you? Unsure what it takes to start a coaching business? Then let's see if we can remove the mystery for you.

A coach, by Terri Levine's definition, is a person who is a guide and supports other people on their life and work journeys to create more of what they are wanting. That doesn't mean we give answers or advice, and it doesn't mean we teach or lead. It means we act as partners with our clients to discover what they want and how best to achieve it. It isn't about the coach having all the answers; it is about the coach helping the client tap into the answers. Coaches aren't magical, and we aren't all necessarily brilliant. We simply have a drive to help others achieve more, and we have a strong desire to do this work.

The fact is, today, in most states, anyone can call themselves a coach. There are business coaches, wellness coaches, relationship coaches, life coaches, executive coaches, and fitness coaches. What sets coaches apart is their training and their specialty. So, before you make any decisions about if you should be a coach or whom you should coach or what training you need, let's help you find your passion and see if you are cut out for coaching. If you are, let's find out what's holding you back from becoming a top one.

Check Your Passion

There is nothing more important in starting a new business than being sure *that* business is right for you and that you have a desire to be in that business. If you can't imagine being on the phone, or in person, with individuals or groups for much of the time, then this profession isn't a fit. If you get excited about speaking with people for most of the day and want to be self-employed, setting your own hours and your own fees, then coaching might be the right opportunity for you.

The most important thing is to be sure you feel a passion for doing this work. That you are so excited about the coaching business, owning your own business, and doing this work that you are willing to do the marketing (yes, marketing) that will allow you to share your passion with others.

If you can't see yourself being a coach and sharing the fact you are a coach with others, then you might be a great coach who never gets to work with clients. You must be willing either to do the marketing (or share your coaching passion with prospective clients) or to pay someone to do this for you. This doesn't mean that marketing has to be a dirty word or scary or manipulative. There are many resources to help you make this more fun—this book being one of those resources to help you.

Proper Training

If you still feel you have the passion for coaching and a willingness to find fun, easy, effortless ways to market coaching, then keep going. Now it is time to find out how and where you can learn coaching skills and, most importantly, to understand how you learn. Some adults like to take home-study programs, others online courses, some prefer to read books, others do well with in-person training, some do well by mentoring, and others by telephone group classes. Get clear about how you prefer to learn.

To be an effective coach, you will need coach training by other experienced, successful coaches who provide your training using the method in which you learn best and who can help you select your coaching niche and areas of expertise.

You don't have to get your coach training in a standard way, nor do you have to belong to any coach lobbying organization or one of the various coaching associations or organizations to be an extraordinary coach.

You do need to have training that is fun, easy, and joyful for you, in which you really learn and can apply your learning, and in which you receive information and ideas that support you in your coaching business. Without the proper training, you will fall short of client expectations, you will have low self-confidence, and your chances of success will be much smaller.

Give yourself an advantage; find a training program to learn the skills you need. Do it for you and for your clients.

What Coaches Do

We think it is very important for you to really see and feel what coaches do with their clients and what it is like to have a coaching business. We suggest to all new coaches that they speak with people doing coaching and get a feel for what they like about coaching, what their days are like, and what to expect. You wouldn't open a business without a clear picture, right?

When you have a vision for your coaching business, you will be able to achieve it. If you don't, your chances of succeeding are much lower. Having a clear vision for your coaching business is like driving a car with a crystal clear windshield. You probably remember a time when you drove along with a clear windshield and noticed all of the beautiful scenery and colors in the environment. Not having a vision is like driving with a dirty windshield; not only will it be less enjoyable, but you will be likely to wind up lost, take a wrong turn, or miss important signs. A great quote by Yogi Berra to illustrate this idea is: "If you don't know where you're going, you might wind up somewhere else."

When Terri received her master's degree in speech-language pathology many decades ago, she had no clear idea of what she was to do all day long in that profession. After spending lots of money, time, and energy to get that degree, she soon discovered that this profession was somewhat boring. Rather than you also discovering something like this later, do some research right now.

Why Coaching Is Booming!

Coaching is a rapidly growing profession, both for personal coaches and professional coaches, because people are realizing, as are companies, that they need help. They have tried self-help books and tapes. They have brought consultants and trainers into their companies. But nothing has stuck, because once the book is read or the consultant leaves, we go back to our old ways.

The use of executive coaching is widely reported to be growing rapidly. A recent study published in Jeffrey E. Auerbach's *Seeing the Light: What Organizations Need to Know about Executive Coaching: The* 2005 State of the Coaching Industry Report provides hard data to show the increased utilization of executive coaching. The College of Executive Coaching and Jeffrey E. Auerbach surveyed 101 organizations, and 58 percent of respondents said coaching utilization increased in their organizations in the past year, and 95 percent said coaching increased in the past five years. None reported a decline in coaching utilization. This impressive finding suggests that organizations that have utilized coaching find it so valuable that they continually increase its usage, even though executive coaching can be an initially expensive service (Auerbach, 2005). Companies are getting a great return on their investment!

The reason this profession is one of the fastest-growing professions in the world is simple. Individuals and businesses have come to the same conclusion: They want help, and they want results that last. Coaching does this; the results last and the outcomes are measurable.

Why Would People Hire Me to Coach Them?

Many coaches we have worked with ask why they would be hired. It is natural to wonder whether you will be truly successful and to