



Health Coaching

Introductory Sessions & Signups!

Signing clients through an Introductory Session

Many of us who are full of empathy, and enter this field, are not sales people. Many times we are uncomfortable selling ourselves at all. Doing marketing can often be a challenge, and it's even harder to market yourself. I've given away my own services for years and years because of my own issues with selling my services, it's only been recently I finally opened my doors so to speak.

At some point you need to decide are you going to do this full time or as volunteer work? There is nothing wrong with either! But straddling the line is not only painful, but disingenuous to yourself. Where do you see yourself in 1 year, 5 years? I struggled with feelings of failure because I wasn't successful financially. Then I realized, that wasn't my goal in the first place. True, I wanted to make money, but it wasn't really my goal. My goal was to learn and share. I was and am, quite successful with that goal. So, then I had two choices stop telling myself money was a goal, or actually make money one of my goals. You too have to make that choice. You can always change your mind, that is no problem, but be aware of what you are telling yourself about your choices, and really think them through. What exactly do you want to accomplish? Remember those SMART goals? Yup, practice what you preach!

Once you've decided to sign up clients for a fee, this method of signing clients works well. You can still offer free stuff while not being too salesy.

BEFORE this session, make sure they fill out the registration form - see Appendix in the handout "Health Coaching Program" and they've submitted that to you. This session will likely take about 1 hour.

1. Introductory Session

Give them a very brief introduction about yourself and how coaching works. Ask client a bit about themselves. Ask them what they expect from the coaching sessions. Make sure they understand your role is to guide, not to have all the answers. Expectations make or break relationships. Both you and the client need to be on the same page as to what you can achieve together. Spend just a few minutes on this. Sample dialog: "Welcome, I'm so glad you could join me today. My names is _____ and I have been trained in health coaching by the Body Mind Health Coach Program. I'm a mother, wife, and business woman who loves kayaking, photography, and watching sci-fi movies. Tell me a bit about yourself in a few words?" WAIT for their reply then, "That's very interesting that you like jogging, that may fit perfectly into your health goals. Just briefly, I want to share with you what coaching is. It is a process where I will ask you questions to help you identity and accomplish health goals. I'm not a therapist or a doctor and you'll still need to follow their advice throughout all our time together. But I will provide feedback and helpful tools to get you on track."

Next, set expectations. Let them know how you're going to coach them. Identify the goal of the session is to help establish their health goals and some of the challenges they face. And give them a "heads-up" that you are going to tell them about your services. Sample dialog: "In this session we will take the next 40 to 50 minutes to look at a few of your health goals and challenges to those goals through questions, brainstorming, and worksheets that will help you gain clarity as to what you really want and need."

Then, establish where the client is at right now and what they want to improve. Sample dialog: "So let's start off

with the first question: What made you sign up for this health & wellness session?" Let them answer (take notes, use active listening, summarize and repeat) "Is there anything else?" Let them answer (take notes, use active listening, summarize and repeat). "Is there anything else?" Let them answer (take notes, use active listening, summarize and repeat). Spend at least 15 minutes on this. Other questions you could use:

"What health goals are you considering right now?"

"What is the #1 thing relating to health that you could use some clarity on?"

"Why is that important to you?"

"What impact will accomplishing these goals have on your life?"

Let's have a look at your health. Do the Life Inventory sheet and compare with what they stated they want to improve. Approx. 10 to 15 minutes or so, depends on the client.

Then spend some time on what are the challenges they face. Sample dialog: "So what do you see as in your way to achieving these goals?" "Anything else?" "What else? Spend about 5 to 15 minutes on this. Other questions you can ask: "What is the greatest challenge that you're facing that you'd like help confronting?" Identify their obstacles: Ask them, "What's stopping you from having this _____?" "And, what else?" "And what else?"

If they're not sure, you can suggest common obstacles that hold other people back, such as:

- a. Not being clear on what you want
- b. Not having a good strategy
- c. Skills or resources that you don't have yet
- d. Environmental – non-supportive influences, people bring you down, exposure to temptation
- e. Psychology – fears, doubts, limiting thinking

Summarize what they want to achieve and the obstacles they face. Ask them if you got it correct? Was there anything else we missed that you'd like to add? WAIT FOR RESPONSE. "Ok, that's great."

Ending the session and lead into your offer. Sample dialog: "Well, now you have put to paper, so to speak, what you really want and some of the challenges you face in achieving that. You've accomplished a lot in this session. I'd love to help you work on a step by step plan to walk you through the goals you want to achieve. I'll be here for you to work out the difficulties and guide you to solutions for challenges that may arise. Let me tell you a bit more about coaching: We help people identify the obstacles, options, and solutions in creating a health plan." Some examples of things you could mention to the client are:

Get clear on their vision for health (we've already done a lot of that today)

Help people strategize their actions – plan where you want to go and how to get there

Identify the skills or resources that you don't have yet and make a plan for how to get what you need.

Optimize their environment by identifying what obstacles are in their way and strategizing how to eliminate or overcome them

Be an accountability partner that helps them stay on track and follow through

Optimize their psychology by identifying the fears, doubts, and limiting thinking that is holding them back and working with them to overcome their fears and change their thinking.

Provide scientific information on health and wellness and other resources to help them plan their health goals.

Then, finally, confirm whether the client can see the value in having a coach to work through this problem. You could ask questions like:

Would this be helpful?

Do you see the benefit of this?

Then, offer to share more about what you can do for them. For example, you would say something like: "I have a program designed specifically to help people overcome (fill in their problem) and achieve (fill in the results they're looking for). Would you like to hear more about it?"

If they say no, let them know that is perfectly okay. You don't have to get EVERYONE to sign up. Remember, we are only picking ripe fruit. If they are not ready or not a good fit, that's ok. We all have different needs and personalities, and it's ok if not everyone signs up with you. Do not push, or you may find yourself regretting what you get into. Make sure you let them know it's perfectly fine if now is not the right time for them, or the right fit, and let them know that you've enjoyed the conversation. End on a high note: share an inspirational story or quote to encourage them to keep moving forward toward their goals, even if it isn't with you. You could also recommend a relevant book or other resource. Offer a follow-up email: Let them know that you will send them a follow-up email that will break down what offer will be available to them in the future, should they change their mind. You can also send them other products or services that may be a better fit for them, now or in the future. And don't forget to add them to an email list.

Most of the time, they are going to say yes. They're in the free session with you because they are ready to get help. If they answer yes, say, "Great. We have a couple options for sessions (fill in your options including time frame and prices), which one would work best for you?" If they answer 1 or 2 then book their next appointment. If they aren't sure, then ask what is holding them back and try to resolve that.

Be sure to ask them if they have any other questions before ending the session. Make sure they are completely comfortable with the arrangements you made with them and wish them a happy, healthy day!

(Several of the ideas listed in this handout are taken from "Life Coaching: Convert Free Sessions into Paying Clients" by Joeel and Natalie Rivera on Udemy.com as well as other courses and books on the subject.)