

Marketing for Coaches & Consultants — Workbook

This workbook turns the course into a working client-generation system you can run this month. Each section matches a course module and gives you exercises to think, worksheets to fill, and checklists to execute. Work through it in order, then use the templates to track leads, calls, and revenue so your marketing becomes a system you can steer rather than a guess.

Niche Positioning and the High-Ticket Offer

Lock in a niche you can own, a one-sentence positioning statement, and a packaged offer priced for a real business.

Exercise: Find the Niche You Can Own

Brainstrap at least five possible niches, then score each against the three tests from the course (specific person, painful problem, your credibility) and commit to one for the next 90 days.

- List five specific people you could serve, each named by their exact LinkedIn job title, not a broad label like business owners.

- For each, what painful, expensive, urgent problem would they type into Google at midnight?

- Which of these can you most credibly solve, and what in your results or background proves it?

- Which single niche will you commit to for the next 90 days, and what is the biggest reason?

Worksheet: Positioning Statement Builder

Use the frame I help [person] go from [before] to [after] through [method]. Draft ten versions on scrap paper first, read each aloud, then record your chosen final version and where you will deploy it.
Specific person (exact job title or role)

Painful before-state (in their words)

Desired after-state (concrete, with a number or timeframe if possible)

Your method or vehicle (named if you have one)

Final one-sentence positioning statement

Deployed to LinkedIn headline? (Y/N)

Deployed to booking page tagline? (Y/N)

Worksheet: High-Ticket Offer Designer

Define your packaged offer using the four parts from the course, then reverse-engineer the price from your income goal. Leave the calculated price-per-client cell empty and compute it yourself.

Promise (the measurable outcome)

Mechanism (your named method or steps)

Deliverables (sessions, support, materials)

Duration (number of weeks)

Annual income goal (USD)

Number of clients you can realistically serve per year

Required average price per client (income goal divided by clients) (USD)

Your final package price (USD)

Checklist: Positioning and Offer Ready Check

- I can name my buyer's exact LinkedIn job title.
- I can name a problem my buyer already tries to solve.
- My positioning statement is one sayable sentence with a concrete before and after.
- My positioning statement is live on my LinkedIn headline.
- My offer is a packaged outcome with a fixed price, not an hourly rate.
- My price was reverse-engineered from an income goal, not guessed.
- I have decided whether I offer two or three tiers.

Building Authority With LinkedIn Organic

Rebuild your profile as a sales page, set up a content system you can sustain, and start warm outreach that opens conversations.

Worksheet: Profile-as-Landing-Page Audit

Audit the four elements buyers actually read and record the rewrite you will make for each, so your profile sells when content sends a visitor to it.

Banner: who you help, the outcome, and the call to action you will put on it

Headline: your positioning statement (paste the exact 220-character version)

About: the first two lines that lead with the reader's pain

Featured item 1 (booking link)

Featured item 2 (case study or testimonial)

Featured item 3 (best post)

Profile photo updated and professional? (Y/N)

Exercise: Write Five Posts From the Four Types

Draft one week of content using the four post types from the course. Spend real effort on the first line of each, since the hook decides whether anything else gets read.

- Educational post: what specific tactic or three-step method will you teach, and what is the hook?
 - Story post: which client transformation or personal lesson will you tell, and what is the hook?
 - Belief post: what common advice in your field is wrong, and what do you believe instead?
 - Offer post: what is the exact call to action (for example, comment START) and how many spots are open?
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Worksheet: Warm Outreach Tracker (this week)

Plan and record ten to twenty genuine outreach conversations with people who already engaged with you. Keep it human; the goal of message one is message two, not a pitch. Person and where they engaged (commented, reacted, viewed profile)

Personalized first-line reference (only true for them)

Connection note sent? (Y/N)

Value-led or curiosity message sent? (Y/N)

Number of replies exchanged so far

Real problem surfaced? (note it)

Call offered / call booked? (status)

Checklist: LinkedIn Engine Live Check

- My headline is my positioning statement, not my job title.
- My about section opens with the reader's pain in the first two lines.
- My featured section links to my booking page.
- I have five posts drafted and scheduled for the coming week.
- Every post has a deliberate first-line hook.
- Offer posts are no more than one in five.
- I am sending 10 to 20 genuine, personalized messages per day, not automated blasts.

The Discovery-Call Funnel

Design the shortest credible path from post to booked call, run the call with a structure that closes, and follow up so not-now does not become never.

Worksheet: Map Your Funnel and Find the Leak

Write out every step a prospect takes from first contact to a booked call, then mark where you suspect leads are leaking and what you will remove or fix.

Step 1 (awareness source: post, comment, profile view)

Step 2 (profile confirms fit and points to booking)

Step 3 (booking page title naming who it is for and what they get)

Step 4 (qualifying questions on the form)

Step 5 (confirmation and reminder emails)

Scheduling tool chosen (Calendly / SavvyCal / TidyCal / other)

Biggest suspected leak and the friction you will remove

Exercise: Script Your Five-Part Discovery Call

Prepare the questions for each stage of the call so the prospect speaks roughly 70 percent of the time and reaches their own conclusion that they need help.

- Frame: how will you set the agenda and get a yes to proceed in the first two minutes?
 - Diagnose: what three questions will uncover the problem, what they have tried, and what it is costing them?
 - Desired future: what question gets them to describe success in their own words?
 - Prescribe and decide: how will you connect their problem to your offer, state the price, and ask your closing question?
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Worksheet: Objection and Follow-Up Planner

Prepare honest responses to the three objections you will hear most, and design your follow-up so a not-now stays alive. Hold your price; change scope, not fee, if budget is the real constraint.

Price objection: your response that reconnects price to the cost of their problem

Time objection: your response that the problem already consumes their time

Trust objection: the case study or first-milestone you will use to reduce risk

Let-me-think-about-it: the clarifying question you will ask to surface the real concern

Recap message you will send within one hour (draft it)

Second follow-up (value, not nag) and the day you will send it

Concrete next step and date you will agree before the call ends

Checklist: Call-Ready Check

- My booking page names the specific person and the outcome of the call.
- My booking form has two or three qualifying questions.
- Reminder emails are set for 24 hours and 1 hour before.
- I have a written five-part call structure.
- I will let the prospect talk roughly 70 percent of the time.
- I will state the price clearly and then stay silent.
- I have a recap-and-follow-up sequence ready for prospects who do not buy on the call.

Webinar-to-Close and Measuring What Works

Design a value-first webinar and its email sequence, then track the four metrics that let you forecast revenue and steer the business.

Worksheet: Webinar Designer

Plan a value-first webinar using the five-part structure. Teach the what and why fully; reserve the how-with-help for your offer.

Webinar title (how to [outcome] without [pain])

Hook and promise (the outcome and why now)

Credibility point (a result, not a biography)

Core teaching: three to five concrete points you will deliver

Transition line from teaching to offer

The single offer, price, and reason to act now

Tool you will use (Zoom Webinars / Demio / Zoom Meetings / other)

Exercise: Build the Webinar-to-Offer Sequence

Plan the emails that fill the room and convert the people who did not buy live, since most webinar sales happen after the event.

- How will you drive registrations from your existing audience without ads (posts, invites, featured link)?
 - What reminders will you send (24 hours, 1 hour, at start) to lift attendance above the typical 30 to 50 percent?
 - What will the replay email say to no-shows, and when will you send it?
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- What are your two or three post-webinar close emails, and what real deadline will you use?

Worksheet: Four-Metric Weekly Scoreboard and Forecast

Record this week's four metrics, then reverse-engineer your revenue goal into a weekly call target. Leave every calculated cell empty and compute it yourself; an empty cell beats a wrong number.

Leads this week (qualified prospects entered)

Calls booked this week

Clients closed this week

Close rate (clients divided by calls, as a percentage)

Revenue booked this week (USD)

Your package price (USD)

Expected revenue per call (close rate times package price) (USD)

Monthly revenue goal (USD)

Calls needed per month to hit the goal (goal divided by revenue per call)

Checklist: Scale and Measure Check

- My webinar teaches genuinely useful content before any offer.
- I make exactly one clear offer with one price.
- Registration, reminder, replay, and close emails are all set up.
- I am using a real deadline, not a fake resetting timer.
- I track leads, calls booked, close rate, and revenue every week.
- I know my close rate and benchmark it against 20 to 30 percent.
- I have converted my revenue goal into a weekly number of calls to book.

Your Action Plan

1. Choose one niche and write your one-sentence positioning statement; put it live on your LinkedIn headline today.
2. Package your offer with a promise, mechanism, deliverables, and duration, and set a fixed price reverse-engineered from your income goal.
3. Rebuild your LinkedIn profile's banner, headline, about, and featured section so it sells like a landing page.
4. Set up a scheduling tool with two or three qualifying questions and reminder emails, and add the booking link to your featured section.
5. Draft and schedule one week of five posts using the four post types, with a deliberate hook on each.
6. Send 10 to 20 genuine outreach messages a day to people who engaged with your content, aiming for conversations, not pitches.

7. Write your five-part discovery-call script and your responses to the price, time, and trust objections.
8. Run discovery calls, hold your price, and send a recap-and-follow-up message to everyone who does not buy on the call.
9. Design one value-first webinar plus its registration, reminder, replay, and close emails, and run it live to your audience.
10. Track leads, calls, close rate, and revenue every week, and use the numbers to set next week's activity targets.

