

COACHING RESOURCES

Behavior Change Roadmap Worksheet

A done-for-you frameworks resource from the Coaching Resources collection. Customize it with your branding and use it with your clients today.

Your Step-by-Step Checklist

- Define your coaching niche and ideal client
- Choose your business name & secure domain
- Set up a professional email address
- Create your coaching packages & pricing
- Prepare client intake & agreement forms
- Build a simple booking / scheduling system
- Set up a payment processor (e.g. Stripe)
- Create a lead magnet to grow your email list
- Design your social media profiles & templates
- Draft your discovery call script
- Set up a client onboarding sequence
- Schedule your first 3 discovery calls
- Define your client retention & referral process
- Track your revenue and key metrics weekly

Notes
