



# Strategies for Greatness

leading yourself & others

## COACHING PRACTICE OVERVIEW

### **Coaching Practice Name** Vision, Mission, and Values

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- Vision:** *In a sentence, what “Bigger than Yourself” purpose do you want to accomplish?*  
**Mission:** *In a sentence, how will your coaching practice accomplish its’ vision operationally?*  
**Values:** *List the 5-7 foundational principles that will guide the creation of your environment.*

### **Coaching Practice Name** Calling and History

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- *How are you gifted and prepared for this new endeavor?*
- *What education have you completed? What do you need to prepare you further?*
- *What have you done to prepare your coaching practice for the future?*
- *What barriers/clutter projects do you need to overcome to be effective?*

### **Coaching Practice Name** Coaching Practice Model

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- *Who are your ideal clients for your coaching practice? What network will you draw from?*
- *Briefly describe the service you will provide and what your unique niches are.*
- *What is your ideal mix of income streams (see financials)?*
- *What is your ideal work environment (telephone, in-person, mix)?*
- *Why will someone choose you over other coaches? What is your elevator speech?*
- *What are your ideal hours of work/number of clients?*
- *Are you incorporated? Do you have your potential liabilities covered?*
- *How will you know you’re successful?*

### **Coaching Practice Name** Growth Strategy

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- *What will trigger the need to expand? (Establish service excellence parameters at every phase of expansion.) Is every service offering profitable for you?*
- *Are you cognizant of the need for ongoing marketing and attending to your network?*
- *What is your 3-5 year plan of growth? (Back it up with a 3-5 year financial projection.)*
- *How are you protecting personal margin and assuring personal integrity?*
- *What is your finish line? How much is enough?*

### **Coaching Practice Name** Personal Growth Strategy

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- *What do you have in place to ensure your practice and clients are cared/prayed for?*
- *Is your own life “irresistibly attractive?” Are you operating with integrity?*
- *Are you growing personally and experiencing ongoing professional coaching?*
- *How will you maintain the practice of lifelong learning? Are you reading relevant topics?*
- *Which additional credentials will you need? Are you working toward your CEU’s?*
- *How will you maintain your physical/spiritual/emotional/and financial health?*
- *Do you identify with the profession? Are you attending coaching conferences?*
- *Is your practice aligned with your values? Are you eliminating your own tolerations?*

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**Fran LaMattina, MCC, BCC**  
Executive and Leadership Coach

Office: 770.552.9676 h Cell: 770.335.5500 h Fax: 770.552.2941  
E-mail: [franl@strategiesforgreatness.com](mailto:franl@strategiesforgreatness.com)

### **Coaching Practice Name Board of Directors/Personal Accountability**

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- *Who have you invited to give you unfiltered input about your performance/"the last 10%"?*
- *Do you have older/younger/peers in your life that you allow to speak frankly to you?*
- *Seek out mentors/coaches/counselors/financial planners/spiritual guides as needed.*
- *Cultivate Self-awareness, Emotional Intelligence, and Accountability through wise counsel.*

### **Coaching Practice Name Human Resources**

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- *What type of individual(s) do you need who will compliment your giftedness?*
- *Have you considered contract services for specialized needs like administration, technical support, website development and maintenance, bookkeeping and billing?*
- *Will you do your own marketing and branding? If so, become educated about those tools.*
- *What are you planning to do to ensure ongoing training and skills development?*

### **Coaching Practice Name Branding/Marketing/Communication Plan**

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- *What is the unique trademark/logo/distinctiveness of your practice? Is it consistently displayed on all your information? What will you use each tool to accomplish? (i.e. Website, Welcome Packet, etc.)*
- *How will you engage your target audience? How will you get in front of them? How many contacts will it take to get each client? How will you retain existing clients?*
- *How will you regularly communicate with your clients?*
- *What will your strategy entail: website/speaking/writing/notes of encouragement/quarterly emails, etc.?*
- *How will you manage your client database and ensure you accurately keep a clean calendar?*

### **Coaching Practice Name Financial Strategy**

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- *Determine realistic needs and wants. Develop a personal budget.*
- *Avoid fulltime transition until debt is manageable or non-existent, if possible.*
- *Ideally, save three-six month's expenses for emergencies and/or business fluctuations.*
- *Track monthly income and expenses to determine year over year trends and projections.*
- *Pay attention to the numbers! Hire a financial planner and/or bookkeeper as necessary.*
- *Have historical results and a three-five year financial projection at your fingertips.*

### **Coaching Practice Name Personal Plan**

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- *What are your monthly projects? Your clutter projects? Monitor weekly.*
- *What are your one-year initiatives? Your personal desires? Monitor monthly.*
- *What are your five-year goals? Your really "big rocks?" Monitor annually.*
- *What are your ten-year goals? Your purpose realized? Dream big.*
- *How are you managing your time and energy?*
- *Finally, build a life, not just a business...*

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Office: 770.552.9676 h Cell: 770.335.5500 h Fax: 770.552.2941  
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