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Welcome: How We All WIN!

Welcome to financial freedom in your coaching business!

By participating in the Tao Cha Ching program, you took your first step toward financial freedom and transforming your coaching business. If you read James Clear's book [Atomic Habits](#), then you know that most people think their results are "linear" (see figure 1 to the right). But one of the key lessons in this program is that ***your results are dependent on the actions you take each and every day.***

A common lie we tend to tell ourselves is that we must witness immediate results, or this program isn't working!

Please don't be fooled. Farmers don't expect instant results from planting seeds in their fields, right? Consistent right actions always lead to the outcomes you desire. What's important before we even begin our work together is to understand this thing called, **"The Valley of Disappointment."**

Take a good hard look at the chart. Results are *rarely* linear. Today, our brains are constantly seeking instant gratification – those regular dopamine hits that motivate us to stay on social media longer than we should or even watch the next episode of our favorite show despite knowing that it's way past our intended bedtime. But the things that matter most – including your financial freedom and the longevity of your coaching business – don't work that way. Your efforts build and build like roots growing underground. We don't see the results of our efforts until the sprouts break through. Trust the process.

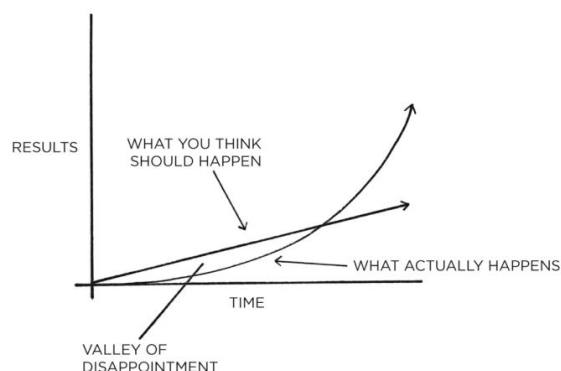
It's not a matter of *if* you'll be disappointed ... it's only a matter of *when*. More importantly, *how* you choose to handle this disappointment is precisely what will determine how successful you are in this program. Realizing that you're in the valley of disappointment is actually something to celebrate! Why?

Because this program was designed to have you get in touch with the very thoughts and emotions that are preventing you from having the coaching business of your dreams. Breaking your patterns will keep this program fun, entertaining and allow us all not to take ourselves so seriously. So when we notice ourselves getting frustrated, discouraged, and disappointed in our results, it's time to celebrate.

We're doing the work exactly as it was designed. This, in turn, allows us to forever change the very trajectory of our results. But we are getting ahead of ourselves. This is simply one of many powerful lessons you will experience over the next 6 weeks of the Tao Cha Ching program. This workbook was created to help you dig deeper into the core lessons we focus on each week. It will be used during each of our live, 90 minute sessions. It will help us go deeper into the core concepts, practice what we're learning and ensure the core principles are being applied to our coaching business.

Trust your inner wisdom here. Each concept leads you inward so that you can trust yourself. I'm not asking you to place your trust or blind faith in me. ***I'm asking you to trust YOU.*** This is your opportunity to identify any scarcity that you may have so that you can tap into your own infinite abundance. Your fears lead you to your courage. And your love is at the center of it all. This is not a "me" program. This is a WE program. That's why our focus is "Financial Freedom for every coach." Let's get started!

THE PLATEAU OF LATENT POTENTIAL



Overview of Tao Cha Ching



Executive Summary

The core principles of Taoism are profound. I have a deep respect for the life-changing trajectory Tao delivers. In Taoism, Tao (“the way”) is the unnameable, primordial force and divine intelligence that sources and drives all existence. Tao is the natural, underlying flow and cosmic unity of the universe.

I believe this divine source flows through each of us. And, in the next 6-weeks, you will have the opportunity to go inward and forever change the trajectory of your coaching business. As bold as that may sound, I'm confident it's true, especially when you trust YOU. Together, we will focus on the only 4 things that matter in your coaching business: (1) Niche, (2) Offer, (3) Generate & (4) Convert. That is, WHO you wish to coach (i.e. niche), WHAT they want most (i.e. Irresistible Offer), WHERE to find them (i.e. Generate Appointments), and WHEN they are ready (i.e. Converting Appointments).

Together, we will use any fears you have about your coaching business to strengthen and grow your **Courage**. We will explore any indifference you may experience and use it to deepen your **Love**. And, together, we will identify any scarcity you have and work with it to unlock your **Abundance**. Simple, but not “easy.” Agreeing to join this program was your first courageous act.

This program will help you examine where you invest your time and decide what current habits you wish to release and what new habits you are committed to establishing. It is our daily actions that determine our future and our degree of financial freedom in our coaching business. Once you have a clear path and understand how your daily efforts produce your desired results ... well, then you will be unstoppable. Just know, there is a difference between “knowing” the path, and taking the daily committed actions that will ensure your financial freedom. This is “the way” or the Tao Cha Ching.

How It Works

In the book *Alcoholics Anonymous* on page 58, “How It Works” begins like this, “Rarely have we seen a person fail who has thoroughly followed our path. Those who do not recover are people who cannot or will not completely give themselves to this simple program, usually men and women who are constitutionally incapable of being honest with themselves.”

This is true for Tao Cha Ching as well. You are encouraged to remain curious and keep an open mind in order to receive the full benefit of this program. Being honest with yourself means pairing deep listening with your own inner wisdom. Tao Cha Ching is a well worn path and a tried and true program of financial freedom. What's truly important is YOUR path to financial freedom. Everyone's is different.

You will be encouraged to go beyond your comfort zone in order to “feel your fears” and do it anyway. That's courage. Courage will bring you back to your inexhaustible well of Love and Abundance. These three will guide you on your path as you begin living in deep alignment with your highest purpose. The Tao, when fully realized, will put you in a flow state you won't want to exit from.

Tao Cha Ching includes five elements:

1. **90 Minute Live (or Recorded) Zoom Sessions**
2. **Daily Audio Reflections on the *AskBill* App (About 5 Minutes)**
3. **Daily Actions You'll Want to Take (From 15 to 120 Minutes)**
4. **ROI (Return on Investment) Metrics Toward Financial Freedom**
5. **Individual and/or Group Accountability Check-Ins**

Core Principles of Tao Cha Ching



Tao (pronounced “DOW”) means “the way.” Cha Ching is the sound a cash register makes which some associate with the sound of “financial freedom.” Tao Cha Ching means “The way of Financial Freedom.” The following are the core principles of Tao Cha Ching. (Please refer back to them often).

1. We are **responsible for our efforts**, not our results.
2. **Consistent right action** leads to the outcomes we seek.
3. **Accountability** supports us in the consistent right action we design for ourselves.
4. **Failure** is our greatest teacher. Rather than fearing failure, we willingly seek it out.
5. **Courage** is not the absence of fear. Courage is feeling the fear and doing it anyway.
6. **Love** is the foundation of everything we do. There is no higher frequency than love.
7. **Abundance** frees us from the tyranny of scarcity and teaches us sufficiency.
8. We choose to reframe any financial “loss” as our **tuition to profound wisdom**.
9. The **core four of any business** are: (1) Niche, (2) Offer, (3) Generate and (4) Convert.
10. Our **niche is WHO** in the world we were born to humbly serve.
11. Our **irresistible offer is WHAT** our niche needs from us as their coach.
12. **Generate is WHERE** we find our niche: (1) Referrals, (2) Direct Outreach, (3) Networking, (4) Speaking, and (5) Writing, and these are listed in the order of speed and effectiveness.
13. **Converting is WHEN** a prospective client is ready. Don’t take rejection personally. This has *nothing* to do with you. (See principle #1).
14. **WHY** we chose to be a coach is a unique and personal decision. It was *never about the money*, but in order to coach sustainably, achieving financial freedom is important.
15. **HOW** is the question and the answer. By being **Honest, Open** and **Willing**. That’s HOW.
16. Here’s the WINning strategy: Focus on **What’s Important Now? (WIN)** If we don’t know what’s important now, then figuring out what’s important now is where we begin.
17. **Expectations** are premeditated resentments. Let go of all your expectations. Be free.
18. A sustainable coaching business is **effortless**.
19. To create an effortless coaching business, focus on what’s **essential**. Let go of the rest.
20. Above all these principles is this: **To thine own self be true**. When you learn to trust yourself and recognize the truth that **you are whole, perfect and complete**, then all the rest of these principles will come naturally and effortlessly.

Do not be overwhelmed by these principles. They are here for reference and a reminder of “the way of financial freedom.” When it comes to implementing these principles, remember that it’s more important to acknowledge and celebrate our continued growth and **progress**, rather than seek perfection. Perfection is the weakest standard because it’s unattainable and impedes action.

Obstacles are not here to stop us; they are here to teach us. Embrace obstacles as the wise teacher they are and we will chart our course to financial freedom and a sustainable coaching business. Each obstacle arrives simultaneously with the breakthrough lesson we need most in this exact moment. Don’t worry about missing the lesson. Life will continue to serve up the same exact obstacle over and over until we learn the lesson we are meant to incorporate into our practice and our lives.

How we choose to celebrate this epic life of ours unconsciously gives others permission to do the same. As grandma wisdom reminds us, “At the end of our life, we will regret the things we didn’t do more than the things we did.” Go for it! Our clients need *all of us* to play full out. Together, we have the power and the responsibility to reshape the world. Coaches have a unique gift the world needs **NOW!**

How Tao Cha Ching Works



To be clear, everything in this program is a *suggestion*. No one will force you to do anything. And, every action you take based on these suggestions will surely illuminate the obstacles in your path to the coaching business you desire and financial freedom you deserve. So let's dig into each one a little further so that you know exactly what they are about and why they are here to support you.

90 Minute Live (or Recorded) Zoom Sessions

You know the saying, "Measure twice, cut once?" Well this is what these sessions are intended to do. Unlike many traditional trainings you may have participated in, these are not intended to be "didactic" trainings (also known as "talk," "lectures" or "sermons"). The number one goal of this part of the program is to have you connect with your own inner wisdom. This time serves as a means to focus our collective efforts, reflect, and complete exercises that reinforce the core learning and applications. While not perfectly divisible, these 90 minute sessions have three parts: (1) Learning & Reflection, (2) Exercises & Practice, & (3) Discussion / Q&A. Each are recorded and shared in the AskBill mobile app.

AskBill Mobile App: 5 Minute Daily Audio Reflections

Your destiny is shaped by your daily habits. What you choose to do every day is your largest predictor of your success and desired outcomes. Each day, you will receive a 5-minute message from me (and yes, this includes Saturday and Sunday). These messages are designed to help keep you focused and deepen your learning during the week. The app will also contain our weekly recorded Zoom sessions (discussed above), access to *Sage Business Development* and intention setting for the day. Spending time in this app between our live sessions will support your continued momentum and daily habits.

Daily Actions You'll Want to Take (about 15 to 120 Minutes)

Don't panic. One of our very first exercises together will be to have you free up significant chunks of your time. While we all can feel significant time pressure, our work together around your time will be both enlightening and freeing. Once you have cleared up 7 to 14+ hours in your week (I know, sounds almost impossible), we're going to arrange our schedules so that we have a consistent time to invest in our coaching business. What we do with that time can vary, but all of it will be in service to your niche and for the benefit of growing your coaching business. On average, you'll want to spend about 1 hour a day here and sometimes that won't be feasible. Consistency is the key to your desired outcomes.

ROI (Return on Investment) Metrics Toward Financial Freedom

Whatever you measure, you improve. Or, as Tony Robbins says, "Where focus goes, energy flows." Top performers LOVE metrics because they remove the guesswork and illuminate progress towards a stated goal. Once you're clear on what it takes to become financially free, we'll change your relationship with metrics so you fall in love with seeing how your consistent, right efforts lead to predictable outcomes. That's true empowerment. Instead of guessing, now you know where to focus.

Individual and/or Group Accountability Check-Ins

Your relationship with accountability will also blossom in this program. No one will "hold you accountable." Instead, you'll see how even one person caring about your progress can make all the difference in how you show up, what you choose to focus on, and how the energy of another human being changes your entire outlook on everything you're doing. The reverse is also true. As you get curious about the progress someone else is making, your path forward is also illuminated. When you spot it, you got it. As you see how others can improve, you'll unlock how best to apply it to yourself.

How Tao Cha Ching *REALLY* Works



Understand The Core Essence of “The Way of Financial Freedom”

Aligning with the way of financial freedom begins with understanding the intersection of Courage, Love and Abundance. Courage is feeling the fear and doing it anyway. This gets us outside our comfort zone and puts us into continuous growth. Love is the most powerful force in the universe and attracts the people we desire to serve at the highest levels. Abundance is the inner journey that frees us from the tyranny of scarcity and reminds us that “I am enough” and “All I need is within me now.”

Gamers: Here Are Your CHEAT CODES!

If you grew up playing video games like I did, one of the most joyful discoveries was all the “cheat codes” that programmers built in so that their friends could easily and effortlessly DOMINATE the game. Guess what? Those cheat codes very much exist in building your coaching business. Here they are:

1. **Essentialism: Less, But Better**

You know that expression, “No pain, no gain.” Don’t believe this lie. Pain is here to teach us what NOT to do. Your business building can be pain free when you obsess over what’s truly essential and let go over everything else. Too much is, well, too much. Pay attention to the absolute *minimum* required of you to generate a single appointment on your calendar. That’s what scales you to a multimillion-dollar coaching business. Say NO to everything else.

2. **Effortless: So Easy Why Would I Ever Stop?**

Even when you strip your business down to the core essentials, it’s still possible to do too much. Keep checking in on how you could let go of anything that feels “too hard” and, instead, do only what feels effortless. Your innate skills boggle the mind of your peers who ask, “How the hell does she do that?” Tune into comments like these. When you connect to the core effortlessness of your coaching business, you’re on your way to total and complete financial freedom.

3. **Your Daily Habits Accurately Predict Your Destiny**

Your actions speak so loudly, I can’t hear a single word you’re saying! Show me a typical 24-hour day and I can predict with a high level of accuracy where you’ll end up in 5 to 10 years. The reverse is also true. Imagine yesterday was magically set to “infinite repeat” (like the movie *Groundhog Day*). Would you be in heaven or hell? MEDS-RX from Brendon Burchard changed my life. Every day, I **M**editate and **E**xercise for at least 30 minutes, **D**iet by putting mostly healthy food in my body, **S**leep for at least 7 hours each day by going to bed at 10pm, work on my **R**elationships, and my **X**-Factor is my WIN (What’s Important Now) focus area of my life.

4. **Money Is An Illusion. Remember That It’s All A Made Up Concept.**

Ever watch the movie *The Matrix*? Remember when Neo is shot and killed and comes back to life seeing the code all around him? Once he learns to manipulate the code, he becomes a kind of superman. That’s essentially what happens with people who are financially free. They understand “the rules” so that they can change the game. I’m not talking about breaking the law (although some choose to go that route). This is about pausing long enough to recognize “the game” we’re all in and choosing to play a different game altogether. Be on the lookout for the many ways Tao Cha Ching challenges “the rules” and “the norms” so that we can be truly free.

5. **I’ve Already Won! (Be Financially Free NOW and Take the Next Right Action)**

Assume you’re already Financially Free. What’s the next right action you would take in your journey?

Yes, there are other cheat codes to be shared along the way, but even if you just focused on these 5 you would be a top-scoring gamer ... er, top 1% earner in your coaching business. This is how I consistently created multimillion-dollar businesses over the past three decades and my own financial freedom.

How to Use This Workbook



A lot of care went into preparing this workbook so that you can have the best possible experience with Tao Cha Ching. While there's no "wrong" way to use the material contained within, there are some recommendations that will support you to get the most out of your experience.

Step 1: Print It Out (or Have It Printed)

Digital has its place, but for best results, do yourself a favor and print this workbook out. Black and white is fine (and color looks better). If your printer at home isn't working for you, take this document to your local FedEx Kinkos, Minuteman Press or similar print shop. Most even allow you to upload from your computer and pick up in the store (or have it sent to your home address).

Why is this important?

Our work together will include completing the exercises contained in this workbook either when we're live together, in the recordings, or between our weekly sessions together. By having this workbook printed out, you'll have easy access to the material, can flip to the right page and spend less time "finding" and maximizing your time completing the exercises.

Step 2: Go At Your Own Pace

While you are free to "skip ahead" and complete these exercises before invited to do so, know that this is not what's being asked of you. I get it. Some of the journaling exercises are really powerful and even sneaking a peek at this material may draw you in like hearing a Siren's call. You do you. If your heart and gut are urging you to dig in and explore the contents, you are welcome to do so. Just know, the essential components of these worksheets and exercises will be covered in the next 6-weeks and there will be time blocked out to work on them together. So if you're not clear, that's okay. Trust that the information you need will be provided as part of the 6-week course.

Step 3: Go ALL IN with this Workbook

The contents you write in this workbook are **private and personal**. It's completely up to you what (if anything) you choose to share. Knowing that, you are encouraged **play full out!** That means hold nothing back. If you enjoy throwing in a few swear words to experience the full freedom of your emotions, then [expletive] DO IT! If you feel like crying when you're journaling, allow your tears to drop onto the page. If you'd rather doodle and draw in the margins to help illustrate a point, please allow this to be your formal invitation to your inner artist.

You see, far too often others have tried to shape and mold you. That is not what this program is about. This workbook is simply a tool to unlock the full and complete version of you that is needed. You know, the one that shows up when no one else is watching. That's who needs to show up in these pages. Express yourself. Free yourself. And, above all, **BE yourself!**

Pro Tip: Make Sure to Play and Have Fun!

Throughout this program, you're invited to be curious about what would make this experience a little more fun and joyful for you. Laugh for "no good reason." Find joy and pleasure in the absolutely absurd. Seek out your most unique and playful behaviors. Being a little weird is not only encouraged, it's what makes each of us unique. Everyone is different and your unique differences are appreciated. Don't hold back. Be the bright, amazing, and incredible 100% version of yourself. Bring every part of yourself and trust that there's room for every unique aspect of what makes you awesome.

AskBill Mobile App Set-Up



Hidden Gem: Psst. Want to know a secret? The AskBill mobile app is built on the same white-label technology that can eventually be rebranded with your own logo, colors and content for use in your coaching business. We'll share more details about this later in the program. For now, as you use the app, begin thinking about how you might make it your own.

Go to AskBill.us/signup

(Designed for mobile, and can also be accessed via desktop)

AskBill is a web app, which means there's nothing to download from the Google Play or Apple App Store. Once registered via AskBill.us/signup, go to AskBill.us/login on your mobile device or desktop to access this platform.

Before you dive into the content, there's one important step we highly recommend: **add AskBill to your phone's Home Screen**. This gives you quick, easy access whenever you need it, just like an app you downloaded from the App Store. Follow the simple steps on the next page to get it set up.

PRO TIP: Make AskBill Part of Your Daily Practice

Each day, you'll receive a 5-minute message designed to help you stay focused, reinforce what you're learning, and maintain momentum throughout the program, including Saturdays and Sundays. Why the weekend? Because these days will help focus on your NOT DOING list (i.e. the opposite of a To Do list). Downtime and recovery are SO important. These gentle reminders will help you let go of the need to be constantly busy, active and productive. Spaciousness for rest, recovery and relation is key.

The Basics Are Everything. You don't rise by doing extraordinary things once in a while. You rise by doing ordinary things at an extraordinary level. We know these daily practices may seem basic to you as a coach. That's exactly why we're emphasizing them. Again and again, we see the root of bigger challenges in the things that seem too obvious to matter: where you're investing your time & attention, how consistently you're showing up, and the habits you're building every day.

Your habits and your focus impact EVERYTHING. That's why we want you to be ruthlessly consistent with the simple things. Don't underestimate them. Don't move past them because they seem too basic. You are not above the basics. Your mastery is built from these core foundations repeated daily.

And that's exactly what AskBill is designed to help you do. Use it to reinforce what you're learning, stay focused, and keep moving forward. It's also there for those moments when you get stuck, and you will, because that's the game of being an entrepreneur. When you do, AskBill is right there in your pocket to help you get clarity and find your way forward.

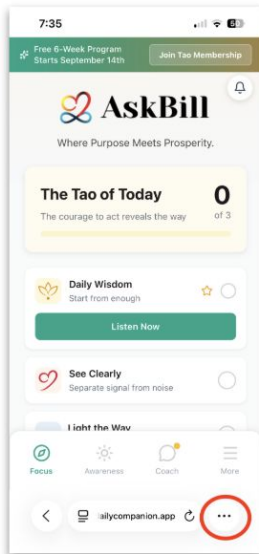
If you want additional support, you can also work directly with the AskBill Coach AI for \$9.99/month, cancel anytime. No pressure. But if you need it, I'll be there with you.

AskBill Mobile App: Add to Home Screen

iPhone: If you are using Safari...

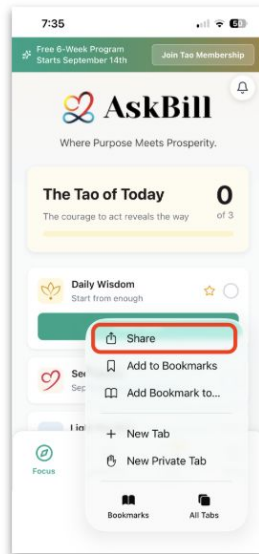
1

Tap the **three dots (...)** at the bottom right.



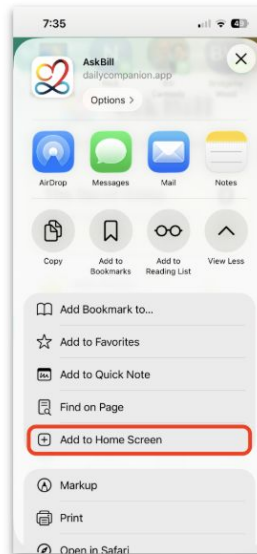
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Tap **Share**.



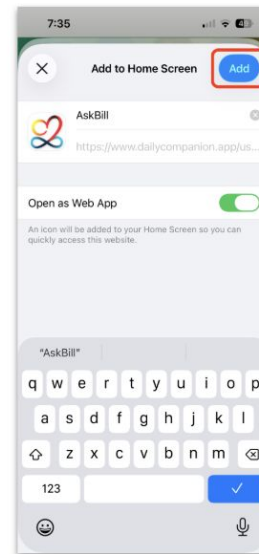
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Tap **Add to Home Screen**.

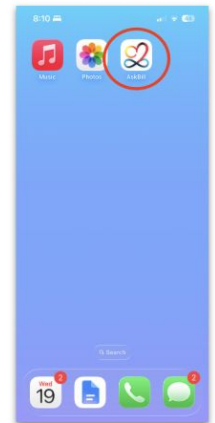


4

Tap **Add**.



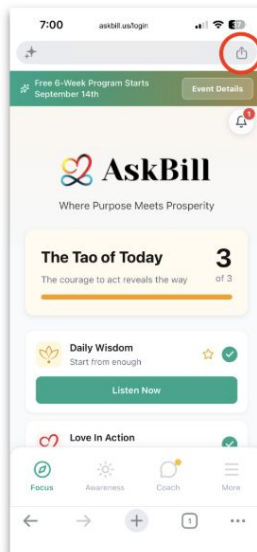
Now you can open your app with one tap, from your home screen!



iPhone: If you are using Chrome...

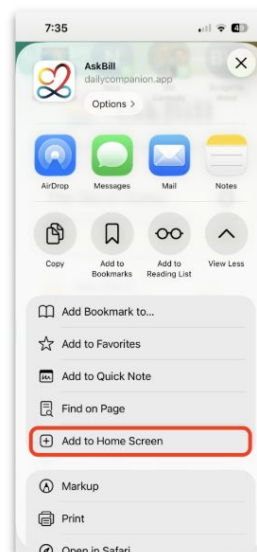
1

Tap the **share icon** in the upper right corner.



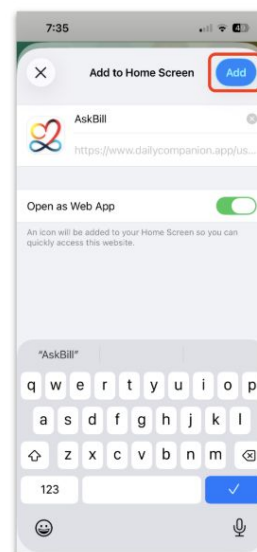
3

Tap **Add to Home Screen**.



4

Tap **Add**.



Now you can open your app with one tap, from your home screen!

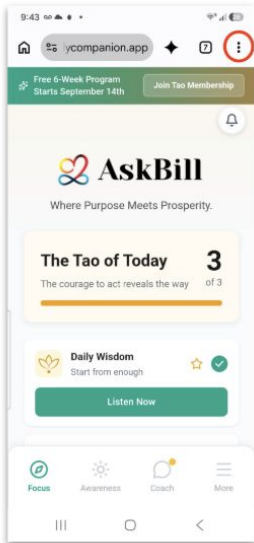


AskBill Mobile App: Add to Home Screen

Android: If you are using Chrome...

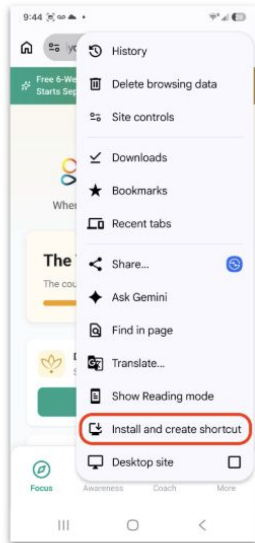
1

Tap the **three dots** in the upper right.



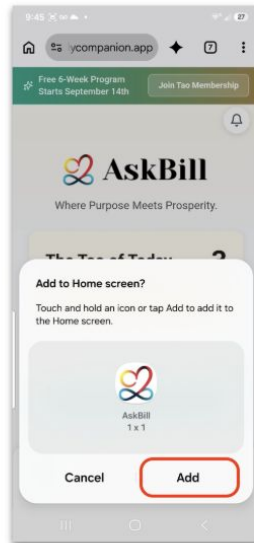
2

Tap **Install and create shortcut**.



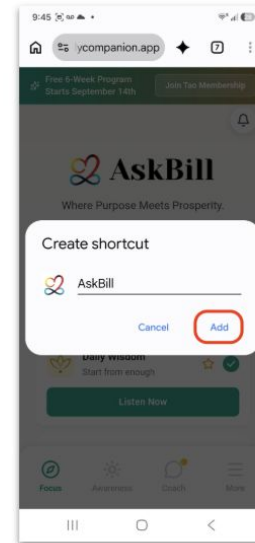
3

Tap **Add**.



4

Tap **Add**.



Now you can open your app with one tap, from your home screen!



Techplaination: AskBill Web App



NOTE: This page is included for the love of our coaches who are deeply curious about technology used and the business decisions made. Feel free to skip this part if that's not you.

Why Is AskBill a Web App?

You may have noticed that AskBill is a “web app” rather than a traditional app you download from the Apple App Store or Google Play. That was a very intentional decision based on both user feedback and where we’re taking AskBill.

We’ve heard from coaches and their clients alike that they don’t want to download yet another app. There’s also a real cost to building and maintaining separate apps for Apple, Android, and the web. This includes platform fees and the ongoing development required to keep everything working together. We’d rather put those resources toward creating more value for coaches.

And the bigger opportunity is flexibility. A web-app foundation gives us the ability to keep building around the coaching industry, recognizing patterns across coaches, their individual business, their niche, and the different ways coaches serve their clients.

Technology in general and AI in particular is evolving rapidly, and we believe some of the most powerful ideas will come from the collective genius of the coach community. We want to build AskBill on a foundation flexible enough to learn from that collective genius and turn what we discover into better tools and experiences for coaches and their clients.

Many platforms say you get your “own app,” when in reality you’re getting a page or experience inside their app. That’s not what we’re building. We’re building a flexible foundation specifically for coaches, with a human-first, technology-second philosophy. It can continue to evolve as we learn and grow together as a collective, all moving toward one mission of spreading more love, courage, and abundance in the world.

The biggest benefit of having a traditional app is having it right on your Home Screen. AskBill can do that, too. You just have to take one extra step to add it. We believe this approach is a worthwhile trade for the flexibility, sustainability, and possibilities given in exchange.

One small extra step for you. A lot more flexibility for what we can build together.

Using the AskBill Mobile App



A Few Resources You'll Want to Know About

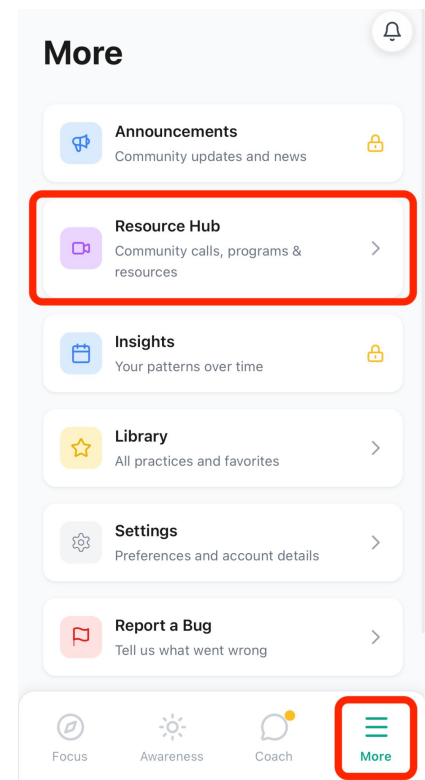
As you move through the Tao Cha Ching program, you'll naturally have questions like, "Where can I find the recording from the live session?" or "Where's the Sage Business Development book?" Both are easy to find in your **Resources Hub**.

Want to revisit a live session?

All live Zoom session recordings are saved under More → Resources Hub → Tao Community Calls. Come back anytime you want to revisit a teaching or catch a session you missed.

Looking for your Sage Business Development book?

You'll find it under More → Resources Hub → Sage Business Development. Keep it handy and use it as a reference as you build your coaching business. You don't need to read it all at once, come back to it when you need it.



FUTURE BUILD: A New Kind of Community: Coach Connect: Give + Get

Scheduled to launch *after* this 6-week program, Coach Connect is your space to connect with other coaches, ask coach-related questions, share experiences, and support one another. Come when you have *something to give* or *something you need*. Ask for perspective, talk through a coaching challenge, share what's working, celebrate a win, or offer encouragement to a fellow coach.

The goal is NOT to create another online community you feel you have to keep up with. Noooooooo! We invite you to engage with intention; when you have something meaningful to give or receive.

If you have a **business-related question**, head to the **Coach** section of the app. That's where you'll find the tools and resources to help you build your business. If you get stuck, you'll also find a way to connect directly with our team for additional support.

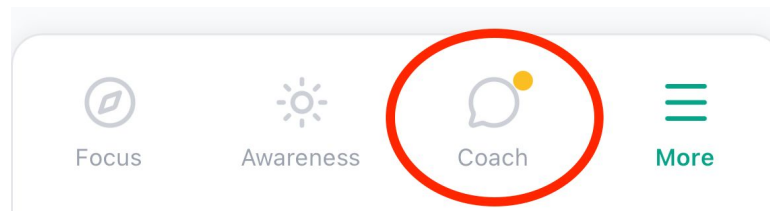
Being a great Tao community member is simple: be generous with what you know, be willing to ask for help and receive it, be curious about the experiences of other coaches, and celebrate the people around you. Most importantly, take what you gain here and put it to work—in your coaching sessions, in your coaching business, with your clients, and in the communities you're building.

Our goal isn't to keep you here. It's to help you grow and send you back out into the world to apply what you learn. As in, "Earn WHILE you learn."

Coach AI in the AskBill Mobile App

Why is the Coach AI Button Currently **Turned Off**?

You may notice that the new AskBill Coach AI is currently turned off in your app. That's intentional.



This Coach button is your AI coaching resource, available right in your pocket, trained on Bill Carmody's coaching trainings, business-development teachings, and methodology.

So why is it turned off? The coach AI is connected to Anthropic's Claude AI, which means every interaction has a real technology cost. As fellow business owners, we believe in serving generously, but we also want to be smart about where and why we incur those costs so we can be smart about building and scaling a business and continue serving more coaches. We're modeling exactly the approach we'd recommend any coach take.

To that end, you will encounter the same principle if you choose to use this white label mobile app (or similar technology resource) in your own coaching business. You don't have to use any technology in your coaching business, but understanding the technology costs behind resources like this one will help you make smarter business decisions; including how you build and price your own offerings. Some resources you may choose to give away for free, and others may require an investment to access.

If you'd like to turn on the Coach AI part of the app at any time, **we've created a month-to-month option for about \$10/mo.** This price point is intended to cover our variable technology costs associated with Anthropic's Claude AI. Feel free to experiment on a "month-to-month" basis (i.e. \$10 for a 30-day trial) and see if / how this enhances your experience during your participation.

Remember, tremendous value doesn't require every feature to be turned on. The audios, teachings, resources, recordings and community in your app are designed to give you a powerful experience while we remain thoughtful about the economics of the technology.



C&COURAGE



Week 1: Courage



Courage is not the absence of fear. Courage is feeling the fear and doing it anyway.

Courage is also having the agency to say “No.” That can be “No forever,” “No for now,” or “No as currently proposed.” Saying “no” gives yourself time, space and permission to explore what’s behind any fear currently being experienced. Courage is how we grow ourselves, our coaching business and our financial freedom. You know this from your personal experience. All growth comes from *outside* your comfort zone. And the edge of your comfort zone is usually where fear begins to show up.

Exploring Fear

When it comes to your coaching business and financial freedom, only you know where the edge of your comfort zone exists. This week, the goal is to clearly identify this edge and begin to go about 10% beyond your comfort zone. Nothing truly “risky” or “unsafe,” so much as feeling “discomfort” and learning to sit with this discomfort. Often, our fears highlight unrealistic scenarios or ones that can easily be mitigated when thoughtfully considered. The more we explore and work with our fears, the less power they have to control us or stop us from consistent right action.

Playing With Courage

As we think back as far as we can go into our time in elementary school, our time spent on the playground was often courageous. We would courageously start an impromptu game of tag, hide-and-go seek, “the ground is lava,” or any number of other games. Anytime we were in “play” mode, we were seeing what our bodies could do and having a blast with other kids our age.

As we got older, our fears crept in and curbed some of that enthusiasm and play. A great example of this was our first time climbing up to the high dive in a swimming pool or considering our first jump off a high rock formation overlooking a river or lake. Many describe the “butterflies in our stomach” experience as all our adrenaline and alarm bells were blaring inside our bodies telling us “Don’t!”

In these moments we always have a choice. To allow our fears to stop us and alter our plans, or to **feel the fear and do it anyway**. The first time you felt your fear and did it anyway, the adrenaline rush was memorable. When you realized you were safe and you jumped off something perched high in the air, it’s likely your next thought after “Wow, that was AMAZING!” was “I need to go do that *again*.”

That’s the thing about a courageous act. It usually comes with a desire to repeat it. Once your body is clear that it’s safe and free from harm, your brain chemistry is used to expand your comfort zone. In many ways you’ve leveled up and things that used to scare you are suddenly no big deal.

Application of Courage to Your Coaching Business

This week, this is what we’re after and it will be different for everyone. Please don’t compare the things that you experience fear around with other coaches. Something that is currently “no big deal” for you probably terrifies another coach. Likewise, things that bring up fear for you are likely not even on another coach’s radar. This is why YOUR inner wisdom is so important. This week’s exercises and worksheets are designed to help you connect with your comfort zone – what’s currently inside and just outside. As you explore what’s currently outside your comfort zone, you’ll want to find the small steps you’re willing to take in order to “feel the fear, and do it anyway.” Only you know what that will be. You’ll have plenty of examples to work with. Find the ones that resonate with you and GO FOR IT!!!

Week 1: Courage to Look



You Are Already Courageous!

I'm not blowing sunshine up your backside. I know this is a FACT, because you are HERE reading this text. Something inside of you said YES and now you're doing the work. Woo Hoo! Now I'm asking you to take another courageous step toward your financial freedom. The courage to look at what fears currently exist and are holding you back. Please consider and rate the more common fears that hold many coaches back and then cover whatever was missed. This is a powerful step and deep work, because you can't overcome a fear you're unaware you actually have. So let's have a think together:

Please Rate Your Level of Fear (1-10 with 1 being "No Fear", 5: "Somewhat" and 10 is "Terrifying")

- | | | |
|--|--|------------------------------------|
| ____ Asking for money | ____ Receiving compliments | ____ Public speaking |
| ____ Asking for help | ____ Receiving money | ____ Being seen / observed |
| ____ Asking for referrals | ____ Receiving a referral | ____ Being corrected |
| ____ Asking for an introduction | ____ Receiving a testimonial | ____ Being rejected |
| ____ Asking for a testimonial | ____ Receiving random gifts | ____ Being talked about |
| ____ Sending a Direct Message | ____ Hearing "No" to your offer | ____ Using artificial intelligence |
| ____ Sending a "cold" email | ____ Hearing silence (in general) | ____ Using technology (not AI) |
| ____ Offering a discovery call | ____ Getting negative Feedback | ____ Saying "no" to others |
| ____ Offering my coaching | ____ Giving negative Feedback | ____ Having hard conversations |
| ____ Increasing my rates | ____ Hearing silence after giving your offer | |
| ____ Introducing myself at a networking event | ____ Knocking on the door of a stranger's home | |
| ____ Making a connection request on social media | ____ Putting yourself "out there" as a coach | |

Nagging fears that I don't see listed here include ...

As I rate these fears, what I'm noticing about myself is ...

Week 1: Exploring My Comfort Zone



First, Write What's *Inside* Your Comfort Zone

Reflect on the many parts of your coaching business that are already inside your comfort zone. What are you already doing well? What's working now? And what is “kinda” working and easily improved?



What's Outside Your Comfort Zone That Would REALLY Help Grow Your Coaching Business?

Consistently spending time growing your business? Generating appointments on your calendar? Having and making a clear offer? Not taking rejection personally? Raising your rates? Something else?

Week 1: Fear to Courage Blueprint



Remember: Courage is NOT the absence of fear.

Courage is feeling the fear and taking action in spite of these feelings of fear. The key insight here is that the action can be so small as to almost feel “insignificant.” Courage begins the moment you take one small step in the direction where your fear is present.

Fear I Currently Have:

One Small Step I Could Take:

How I Will Celebrate:

- | | | |
|--------------------------|---|-------------------------------|
| 1. Being rejected | 1. Meditate and practice being rejected | 1. Smile. I'm doing the work! |
| 2. Asking for a referral | 2. Write out a simple sentence & practice | 2. Dance it out. |
| 3. Public Speaking | 3. Record myself on zoom (just me) | 3. Raise both my arms. Yes! |
| 4. _____ | _____ | _____ |
| 5. _____ | _____ | _____ |
| 6. _____ | _____ | _____ |
| 7. _____ | _____ | _____ |
| 8. _____ | _____ | _____ |
| 9. _____ | _____ | _____ |
| 10. _____ | _____ | _____ |

What I'm noticing about taking one small step is ...

The value I see as I feel my fears and do it anyway is ...

Week 1: The Courageous Rule of 168



Time is the Great Equalizer

It doesn't matter who you are or what position you hold. Every person gets only 24 hours a day and 7 days a week (i.e. $24 \times 7 = 168$). *What* you do with your time directly impacts your results in every area of your life that is important to you ... including and especially your coaching business.

Time Enhancers

Time enhancers are the investments you make with predictable outcomes. For example, when you spend quality time with the people you love, you are growing your relationships and making deposits in your collective emotional bank account. For your coaching business, when you generate ten or more qualified appointments on your calendar, you are likely to enroll at least one client.

Time Wasters

By contrast, time wasters do the opposite of time enhancers. Engaging with the news, for example, isn't inherently a bad thing. But when you allow yourself to get pulled into it, it not only takes time away from what's important to you, it can also hijack your amygdala and put you into a fight, flight, freeze or fawn state (which takes even more time for recovery).

Courage to Have Rigorous Honesty With My Relationship With Time

Without blame or shame, this is your opportunity to stay curious and see the truth of how and where you spend your time. None of these things are inherently "bad." The question is whether you're consuming them intentionally or allowing them to consume more of your time and attention than you want to give them. Awareness is the first step. From there, you can begin to prune what no longer serves you and experiment with intentional "detoxes" from the things that tend to pull you in. The goal isn't deprivation. It's becoming more intentional about where your time, energy, and attention go.

Some of My Biggest Time Wasters Are *(Please Estimate in Hours for the Week or a 24-hour Day x 7)*

- _____ What I really do that wastes my time is _____
- _____ Another thing that wastes my time is _____
- _____ Watching / Listening / Reading the news
- _____ Scrolling / Commenting / Liking / Reposting on my various social media feeds
- _____ Reading various email newsletters
- _____ Replying to / reading / sorting unsolicited messages (email, text, social media DMs, etc.)
- _____ Saying "yes" to invitations to attend free trainings, webinars, and demonstrations
- _____ Answering calls and texts during my focus time on my coaching business
- _____ Watching television and streaming services (especially late night binge watching)
- _____ Playing video games or similar entertainment
- _____ Window shopping / browsing / shop therapy
- _____ Talking to people who have no respect for my time and are getting their emotional needs met
- _____ Mind-altering substances such as drugs or alcohol that help me ignore the real problems

When I add up all these hours, what I'm noticing about my 168 hours each week is that ...

Week 1: The Courageous Rule of 168



Changing Your Relationships with Time

Awareness is the first step to taking your time back and designing your time so that what is most important and meaningful to you is reflected in your 24-hour day. Without blame or shame, you have been invited to look at where you may be spending time that isn't producing the outcomes you desire. So let's change it. Only you know where you wish to invest your most precious commodity ... your time. Let's explore together.

In Thinking About The Last 24 Hours, If Yesterday Were Set to “Infinite Repeat”, would it be heaven or hell?

What would you change so that the most important things in your life received the time they deserve?

Magic Wand Moment: Design Your Perfect Day

Start from the night before. What time would you get to bed so that you could have 7-8 hours of sleep? What time would you wake up? What would you do first? How would you ensure your coaching business received the time it deserves without sacrificing quality time with the people you love? How about flexible time?

Week 1: The Courageous Rule of 168



BONUS Exercise: Design Your Perfect Week

Feeling inspired to keep going and build out your perfect week? The truth is, we live RICH and FULFILLING lives already. On the previous page, you imagined what an ideal day would look like. What would be different when you include the things you truly love (and may already be scheduled)? Consider how to make time for your entire rich and fulfilling life in all areas: (1) Health & Wellness, (2) Coaching Business, (3) Finances, (4) Primary Relationship, (5) Friends & Family, (6) Personal Growth, (7) Physical Environment, and (8) Fun & Recreation.

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Week 1: Make Your **NOT** To Do List



Knowing What **NOT** To Do Is More Important Than Your “To Do” List

Most people love creating “To Do” lists as there’s a dopamine hit every time something on that list is crossed off. Doing MORE is NOT “better,” it’s just more. In order to begin practicing essentialism, it’s significantly more important to know what you are saying NO to, than what you choose “To Do.”

Not Doing Now List

The following are your list of what you may eventually want to do, but simply “not now” as the items on this list would get in the way of building your coaching business ... for now. For example, “Update My LinkedIn Page” or “Rebuild My Website” might go on this list. They will *eventually* need to get done, just not right now.

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Not Doing “Never”

There are longer-term goals that may be looping in your head that you can release here. There’s not even your near-term goals, but eventually you know you would like to do them. Use this list to release these items from your current thinking and know you can get safely back to them 6 to 12 months (or longer) from now. Examples might include, “Write and Publish My Book,” “Become a Global Keynote Speaker,” or “Deliver my TEDx Talk.”

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Week 1: Courage to Declare (No Evidence)



“In The Moments of Decision, Our Destinies Are Shaped” (Tony Robbins)

Financial freedom means different things to different people. For some, it means never needing to work another day in your life. For others, it's the certainty around the necessary skills to generate whatever is needed at the time it's needed. And others experience financial freedom as simply having enough and experiencing the truth of their existing abundance. Whatever it is for you, it's time to “declare without evidence.” That means, you're certain about the *what* even if you don't know *how*.

Today, I Declare My Financial Freedom. No Longer Do I Believe the Lies of Scarcity. Today, I Am Aligned to the Truth of My Infinite Abundance.

I Declare That In The Next 6-Weeks, I Will ...

(Consider the precise outcome you wish to achieve in the next 6 weeks. Be as specific as you can be without knowing “HOW” to do it. Trust that you will know the way once you begin your journey. For example, “In the next 6-weeks, I declare I will generate at least \$6,000 of new coaching revenue and two new clients.”)

Signature

Date

Week 1: Contract With Myself



When I courageously joined Tao Cha Ching, I knew I would change the trajectory of my coaching business. Given my investment of time, I am making this contract with myself. For the next 6-weeks, I am committed to being the best version of myself. And this includes the following:

Handling My Fears, Uncertainties and Doubts *(Please Initial Each)*

- _____ I understand courage is NOT the absence of fear. Courage is feeling the fear and doing it anyway.
- _____ When I experience fear, I will remain curious. ("The cave I fear to enter holds the treasure I seek." JC)
- _____ To the best of my abilities, I will not allow fear to stop me from taking a committed action that would support my personal growth and/or the growth of my coaching business.
- _____ I am courageous enough to acknowledge that I am bigger than any of my fears.

On Being Love *(Please Initial Each)*

- _____ I am enough.
- _____ I acknowledge my love is infinite and does not deplete when I give my love to another person.
- _____ Love is the core of my coaching business. I will not deny love to someone who needs it.
- _____ I will share my empathetic joy with my fellow coaches so that they feel my love on their journey.

Recognizing My Infinite Abundance *(Please Initial Each)*

- _____ I will actively seek out any part of me that experiences lack or scarcity and lean into my abundance.
- _____ I am infinitely resourceful. As such *I will find a way* despite whatever circumstances I encounter.
- _____ I will journey inwards to discover the best answers for my life and my coaching business.
- _____ All I need is within me now.

With all this in mind, I consent to being held high and invited to go beyond the edges of my comfort zone. When I feel the urge to shrink and check-out, I will instead find the courage to use my voice and speak up. I understand that breakthroughs usually follow breakdowns, and that my sharing authentically will support my peers as they discover their own growth and transformation.

Week 1: Contract With Myself



In addition, by signing below, I am making a commitment to myself. To the best of my abilities, I will work to:

1. Generate a *minimum* of \$_____ in net new revenue on or before _____ (date)
2. Establish a daily practice that will propel my business forward far beyond that
3. Regularly share my progress (daily or weekly) with my Accountability Buddy
4. Use the Ask Bill app and/or ask for peer support when I am feeling overwhelmed or stuck in a rut
5. Be open and maintain a beginner's mind as I explore new ideas for growth

Given what I know about myself, my patterns and old habits, for the next 6-weeks, I am committed to minimizing or eliminating the following giant time sucks that no longer serve me:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

I know that by taking these actions, I will free up my precious and valuable time and honor this time in my life so that I have the best opportunity to change the trajectory of my coaching business and establish the financial freedom I'm fully committed to. My goal here is "progress, not perfection." By setting these intentions, I can closely monitor my progress and be aware of any "rabbit hole" patterns that eat up my time and provide me precious little in return. I am genuinely excited and deeply grateful to begin this journey and write my next chapter of my truly epic and amazing life.

Signature _____

Date _____

"The secret of change is to focus all of your energy, not on fighting the old, but on building the new," Socrates

Please print out, sign and hang on your wall so that you see this every day of your Tao Cha Ching journey. When you look up and see this agreement, wink and smile with that inner knowing that you're building something world-changing!

Week 1: Courage to Be Accountable



“The price of greatness is responsibility.” Winston Churchill

You were destined to be great. In fact, you already have everything you need inside of you today and are already amazing and truly great. This is about taking responsibility for your actions (and inactions). As Stephen R. Covey said, “Accountability breeds response-ability.” When we hold ourselves “to account” that means we empower ourselves to respond in ways that determine our growth and our outcomes. Making mistakes and experiencing failure is part of this accountability. By “owning” everything, we need only to look inside ourselves to see what needs to change in order to have the outcome we are committed to having in our life.

“To Thine Own Self Be True.” William Shakespeare

The courage to be accountable means being true to yourself first. It’s about looking at yourself in the mirror and knowing you’re committed to consistent right action and doing your best each and every day. Before asking someone else to support you with your accountability, it’s critical that you begin with being accountable to yourself. Your rigorous honesty leads to self-adjustment around your daily actions and level of effort.

“Knowing Others Is Wisdom; Knowing Yourself Is Clarity.” Lao Tzu

As a coach, you spend a lot of your time understanding and supporting other people. But how well do you understand and support yourself? You may already be taking plenty of action. The question isn’t whether you’re busy. It’s whether you’re being intentional about where your time, energy, and attention are going.

Knowing yourself means being honest about what gives you energy, what drains you, what keeps you busy without moving you forward, and what actually matters. The goal isn’t to do more. It’s to become aware of what you’re doing — and then make conscious choices about what stays, what goes, and what deserves more of you. That is the beginning of real accountability: not judging yourself, but rather knowing yourself well enough to choose your next right action. This leads to a beautiful, essential and effortless flow state.

In Order to Be Accountable to Myself, In the Next 6-Weeks I aspire to:

- ☐ Meditate every morning for at least _____ minutes
- ☐ Exercise _____ days per week for at least _____ minutes
- ☐ Eat healthy foods that give my body nutrition and energy
- ☐ Sleep at least 7 hours each day by going to bed no later than _____ pm
- ☐ Grow the relationships that are most important to me
- ☐ Spend at least 15 minutes and up to 120 minutes every day on my coaching business

Taking the “Next Right Action” In My Coaching Business

Niche. Offer. Generate. Convert. These are the four foundations of every coaching business. For the next 6-weeks I will focus the bulk of my efforts on the most important foundation for maximum growth: Generate. I will use the following worksheet to create my plan of action and be accountable to myself for my direct outreach efforts. While I’m happy to work with my accountability buddy, I know that true accountability begins with me.

What I’m noticing about being accountable is ...

Week 1: Courage to Generate



Taking Small Recommended Steps to Generate Appointments

Begin with the highest potential to generate immediate new client wins: Referrals. Only once you've tapped out on asking for referrals, then go to the next highest potential: Direct Outreach. If you only focused on these two throughout the Tao Cha Ching program, this would be enough.

Small Steps for Generating Referrals:

- ☐ **Make a list.** Start with any past clients you could ask for referrals. Consider friends and colleagues.
- ☐ **Draft an email.** What email might you send to ask for your referral? What would a text message be?
- ☐ **Draft a direct message.** How might you reach out via a direct message on social media?
- ☐ **Reach out.** Begin reaching out to those individuals who could give you referrals.
- ☐ **Schedule follow-up.** "One and done" rarely works. How will you remember to follow up?

Small Steps for Direct Outreach:

- ☐ **Make a list.** Who would you like to pitch your irresistible offer & schedule a discovery call?
- ☐ **Begin a search.** Use LinkedIn's search feature to identify prospects. (1st or 2nd Connections?)
- ☐ **Draft a DM.** Begin with a short message with your irresistible offer & calendar link.
- ☐ **Reach out.** Begin reaching out to prospects and testing your message via text and social media.
- ☐ **Schedule follow-up.** "One and done" rarely works. How will you remember to follow up?

Small Steps for Networking:

- ☐ **Research.** Review upcoming networking and meet-up opportunities in your area.
- ☐ **Sign up.** Register to attend and participate in networking events happening now.
- ☐ **Create a QR code.** Make it easy to W.I.N. with your calendar link & QR Code on your business card.
- ☐ **Stand out.** Shop for a "loud" item like a bright red or yellow hat so you're easily recognized.
- ☐ **Schedule follow-up.** Block time the day afterwards so you remember to follow up.

Small Steps for Writing:

- ☐ **Article titles.** Come up with several article titles relevant to your niche. Think 20 to 50.
- ☐ **Draft an article.** Draft one article that your niche would love.
- ☐ **Publish.** Post one article with the call to action via your calendar link (progress, not perfection!).

Small Steps for Speaking:

- ☐ **Research.** Use LinkedIn's search feature to identify conference organizers.
- ☐ **Draft session titles.** Draft a few session titles and relevant descriptions. (Use ChatGPT to help?)
- ☐ **Reach out.** Begin reaching out to conference organizers with your message.

"Do Not Seek to Follow In the Footsteps of the Masters. Seek What They Sought." Matsuo Bashō

Hold these suggestions loosely and consider the underlying principles rather than specific tasks to complete. Check in with yourself and see what feels right for you. It's important *THAT* you generate appointments on your calendar. It's not important *HOW* you generate these appointments. Whatever actions you choose to take should feel sustainable for you. The more you do it, the easier it will be. Ease leads to frequency and consistency which is what we're ultimately seeking for your coaching business.

Week 1: Even More Ways to Generate



Alternative Ideas for Small Steps to Generate Appointments

There is no limit to the kinds of committed actions you can take in order to generate a single appointment on your calendar. Remember that 10 qualified appointments typically results in the acquisition of a new client, so getting really creative about *how* to generate appointments is worth your time – both in your creative ideation as well as taking consistent bold actions.

Bold Actions Most Coaches Rarely Consider, Let Alone DO:

- ❑ **Create Your Top 100 List.** Take the time to consider your ideal client – who you really want to work with as a coach. Now write down the first 10 names that pop into your head. Then take one of those names and think about “their friends” who fit your ideal customer profile. Keep going until you have 100 names on your list. Put them in a spreadsheet so you can track outreaches to each of them.
- ❑ **LinkedIn Network List Building.** This is where LinkedIn is powerful. Even if you only have a few people you’re connected with, you can still search based on detailed descriptions of your niche. This can include geography, titles, company names, industry, certifications, or other criteria. Use these searches to build and prioritize your outreach list of prospective clients.
- ❑ **Go Door to Door:** Introduce yourself to your neighborhood. Most of your neighbors probably don’t know that you’re a coach. Give them a business card with your QR code to your calendar. Get curious on how you can help them and how best to be a great resource for them.
- ❑ **Host a Party.** Party with a purpose. Most people are happy to attend and if they learn something important in an area they are struggling, they are likely to want to meet you one-on-one for a more private conversation, which you can offer up to them as part of your professional discovery call.
- ❑ **Combine Other Skills.** Do you know how to knit? How about a “Stitch and Bitch.” This is a fun way to encourage people getting together and having important conversations about the things they want to change in their lives. As the leader, you can support while flexing your creative muscles.
- ❑ **Host a Workshop.** If you’re active at your church or similar community center, offer to lead a group on a topic that’s interesting to your niche. As part of your introduction, explain that you are also a coach in case anyone in attendance would like to spend an hour with you outside the workshop.
- ❑ **Partner Up.** Who do you know that you could work with? Perhaps a friend has access to a beautiful space for a retreat. Or perhaps you know someone who raises or rescues horses. Think of the people in your life that could offer unique experiences as part of a combined effort.
- ❑ **Brainstorm More Ideas.** Perhaps none of these ideas are resonating with you. So consider the underlying directionality rather than the idea itself. How might you come up with your own creative solution to meeting with people especially in unique and creative ways?
- ❑ **Charity Raise.** For several years, I have raised thousands for Kids Chance Kentucky by offering a 90 minute coaching session that is auctioned off on the Charitybuzz platform. Doing well by doing good, I am introduced to prospective clients while raising money for this non-profit organization.
- ❑ **Chamber of Commerce.** By becoming a member of your local chamber of commerce, you are regularly networking with local business owners once or twice a month. As you grow your business, you can consider higher-profile networking groups like Vistage, YPO, EO or similar.
- ❑ **Commute or Sports Events.** If you take public transportation or attend sporting events, bring your business cards with your QR code and be ready to connect with new commuters and fellow fans.
- ❑ **What Haven’t We Covered?** None of this was intended to be definitive. Remember, all the answers you seek are already inside of you as part of your inner wisdom. What does your heart and gut tell you about your best avenue to generate appointments on your calendar? Go with that!

Week 1: Reflections on Courage



I want to remember that my fears ...

Key concepts I want to remember about Courage:

Courageous acts I took this week include:

Week 1: Reflections on Courage



At the end of my life looking back, I will regret the things I *didn't* do more than the things I did. What I love about feeling the fear and doing it anyway is ...



LOVE



Week 2: Love



Love Is The Most Powerful Force In the Universe.

When your coaching business is grounded in love, you are extremely attractive to your niche. They can sense how much you care about them and their biggest challenge (i.e. your irresistible offer). Empathy goes a long way. But nothing beats love. It's like this giant magnet pointed at the pain and suffering your niche is currently experiencing, and suddenly replaces that suffering with deep empathy and compassion.

We've all been there. Think about it for a moment. When you're really struggling, you are actively seeking a lifeline. When you pick up on someone who really understands what you're going through, there's a bond that is created. When that bond comes from love, you're establishing a rich foundation from which to create a powerful relationship and transformative breakthroughs. There's no better way to begin a relationship than with the foundation of love.

Exploring Love

When it comes to your coaching business and financial freedom, to quote Tina Turner, "What's love got to do with it?" It's a great question to be in. Most businesses would argue that it's got nothing to do with it. Which is why everything feels so ... *transactional*. Honestly, when's the last time you experienced love in a business context? Now does it make sense?

Love is the quintessential difference between a transactional relationship and an inspiring, true and authentic relationship. Love has *everything* to do with your coaching business and financial freedom. The more your clients feel your love for them and what they are going through, the deeper they will be able to go in your work together and the more powerful their breakthroughs will be in your coaching relationship.

Your love for your niche will stand out and transcend the typical sales and marketing tactics. The more heart you put into your coaching business, the faster you will rise to the top and cut through all the transactional click bait and heartless clutter. Lead with love. It's how you stand out.

Application of Love to Your Coaching Business

This week, you are invited to put down your armor and allow your heart to lead with love. When your head interrupts this recommendation to remind you "that's not how it's done," consider the source. Or as Blaise Pascal once said, "The heart has reasons that reason knows not of." People buy on emotion and backfill with logic. When you lead with your heart, people intuitively feel what you're all about and then look for logical reasons to buy from you.

The logical reason they have, is your irresistible offer. Because, it demonstrates just how well you understand their pain and your unwavering commitment to their desired outcome. Love plus clarity around their desired outcome is an unbeatable combination. It's the essence of the "HELL YES!!" you are seeking as you enroll clients into your coaching business.

And, when you deliver on your promise, this will lead to clients ON FIRE who can't say enough great things about you. This is the ultimate in generating referrals, lovingly referred to as "word of mouth" marketing. Clients who have fallen in love with being coached by you and then achieve their desired outcome are happy to share you with all their friends and colleagues who are struggling with the same or similar problems. Oh, and in case you didn't know, referred introductions turn into new clients 70% of the time. They should always receive the highest priority from you for that reason alone. Not to mention, you want to thank our current clients for taking the time to refer you in the first place.

Week 2: Love the GAME of Business



Learning to LOVE the Business Side of Your Coaching Business

Imagine for a moment that you *loved* generating appointments as much as you currently love coaching. If you're struggling with this concept, you're not alone. This tends to be one of the biggest obstacles of building a coaching business. But what if it were your *favorite* part? It can be. Here's how.

Imagine Your Coaching Business is Just a Game You're Playing

Stay with me. To "win" the game, you simply need to know the rules. Here they are. There are only 4 things that matter in your coaching business: (1) Niche, (2) Irresistible Offer, (3) Generating Appointments, and (4) Converting Appointments. You are not responsible for the result of your coaching business, but you ARE responsible for the amount of effort you put into each of these core 4 areas of your business. As each becomes clear and concise, it makes the others easier and more predictable.

- 1. Love Your Niche.** Who you coach matters. Let go of the compulsion to coach everyone. Instead, focus on the one group of people who need you most in the world. For this game, you are only allowed to enroll 20 clients. That's it. So take the annual salary you want to make as a coach and divide it by 20 and that's how much each client will need to pay you. For example, let's say you want to make \$100,000 per year. Divide that by 20 clients and you need each client to pay you \$5,000 per year or \$420 per month. (Perhaps you decide to round up to \$500/mo and now you're making \$120,000 per year.)
- 2. Love Your Irresistible Offer.** Whoa, Bill, will my niche actually pay me \$500/mo or \$6,000 per year? YES, as long as they are crystal clear on the outcome they will receive from your coaching. Would a couple struggling with their marriage hire a marriage coach if they were sure they could avoid a costly divorce? Would a mid-level manager hire a career coach if they were sure they would get a promotion worth significantly more than their investment of \$6,000 for the year? That's where you can fall in love with the outcome your niche needs. Trust that with your guidance they will, in fact, reach this outcome. Why? Because you are going to play full out and ensure that they do too. When they are ready for a transformation, they will get the breakthrough they've signed up to receive with you as their coach.
- 3. Share Your Love to Generate Appointments.** Once you have spent the time necessary to consider WHO you wish to coach (i.e. your niche) and WHAT they are struggling with (i.e your irresistible offer), it's now time to fall in love with sharing your irresistible offer to your niche in order to generate appointments on your calendar. There are 5 ways to do this in order from easiest to most difficult: (1) Referrals, (2) Direct Outreach, (3) Networking, (4) Writing, and (5) Speaking. Start with asking for referrals – even when you make your offer and receive a "No for now" response. When you've exhausted your network of people who can refer you (for now), move onto direct outreach. Make a list of 100 people you know who are your niche (or who know your niche) that would be your ideal clients and reach out to them. If you just did these first two for the entire 6-weeks of this program, you have a high probability of generating the necessary 20 calendar appointments needed to enroll 2 clients. Even a single client (about 10 appointments) would result in generating your next \$6,000 coaching agreement.
- 4. Fall In Love With Converting Appointments.** When you realize you need 9 "no for nows" in order to generate a single "HELL YES!" response, the love of the game comes down to practicing making your offer to prospective clients without taking rejection personally. Remember Joseph Campbell's quote, "The cave you fear to enter holds the treasure you seek"? For most coaches, the willingness to make an offer is the entrance to the cave and the willingness to not take rejection personally is the deepest darkest part of that cave where all the treasure we seek exists. Practice here. The more you do it, the easier it becomes and before you know it, you've fallen in love with the full game of business.

This is the entire game of building your coaching business. Everything else is a distraction to ignore. Just do this!

Week 2: Reflections on Loving My Business



After reading “Love the GAME of Business”, what comes up for me is ...

When I stop and think about my Niche, what becomes clear to me is ...

And my early thoughts about my Irresistible Offer include ...

When thinking about Generating Appointments, I’m already clear that I ...

And when thinking about Converting Appointments, I know that I must ...

Week 2: Love In Action



Our Daily Actions Predict Our Outcomes

Our results stem from the actions we take every single day no matter what. Now that you've had a chance to consider the only four things that matter in your coaching business, what are the daily actions needed to generate 10 to 20 (or more) appointments on your calendar in the next 5 weeks?

Start With One Appointment

Do you know how many outreaches it will take to generate your first appointment on your calendar? If you're not sure, assume it will take 10 outreaches to generate 1 appointment on your calendar. It may be more or less, but assuming this is "about right", how would you go about doing it?

In order to generate my first appointment on my calendar, I will ...

What I'm noticing about my "Love in Action" is that ...

An obstacle or challenge I anticipate will get in my way as I do this is ...

And I will overcome this obstacle by ...

Week 2: For the Love of Money



Feeling Triggered by This Talk of Money?

Remember, courage is not the absence of fear; courage is feeling the fear and doing it anyway. So let's slow our roll here and capture anything that's coming up with respect to money challenges. For many, this is at the root of the core obstacle that is preventing our financial freedom. Let's dig in here if you're so inclined. Start with whatever is coming up for you right now by finishing this sentence.

Money is ...

Now reflect on what you just wrote down. What I'm noticing about my relationship with money is ...

This is how I'd like to change my relationship with money ...

And one small step in this direction I could take today would be ...

Week 2: Falling in Love with Obstacles



The Obstacle Is The Way by Ryan Holiday

Ryan Holiday wrote [this fabulous book](#) and reflected some powerful ancient wisdom from the Roman Emperor, Marcus Aurelius. My favorite quote is, “What stands in the way becomes the way” which is the foundational principle of *The Obstacle Is The Way*. It means that when we encounter problems and go through hard times, these are not truly blocks. Instead, they give us a chance to practice patience, change our approach, and grow stronger. Moreover, the very obstacles we face simultaneously show us the path to the success we seek. In other words, “Thank God for our problems. They are showing us the way forward!” Use this worksheet to discover how the very obstacles standing in your way are actually showing you “the way” (your Tao Cha Ching!)

The obstacle I am currently facing is ...

Knowing that this obstacle is truly a gift in disguise, I believe this obstacle is teaching me ...

And when I think about overcoming this obstacle, what becomes clear to me is that ...

And the one small step I could take today would be ...

I am grateful for this obstacle because ...

Week 2: Falling in Love with Essentialism



Essentialism: The Disciplined Pursuit of Less by Greg McKeown

Less, but better. That is the essence of Greg McKeown's profound book. Loving the disciplined pursuit of less will free us of all the “non-essential” things we tend to do that rarely (if ever) generate a single appointment on our calendars. The simplicity of focusing on the core 4 of our coaching business (i.e. Niche, Offer, Generate & Convert) means we can have the discipline to ignore everything else. Simple, not easy. That's why it takes discipline. When we let go of all our non-essentials, what remains are the core disciplined efforts that consistently generate appointments on our calendars, build our coaching business and financial freedom (also known as “the way” or Tao Cha Ching!)

In reflecting on all the non-essentials I'm currently engaging in for my coaching business, I notice ...

One essential thing I'm NOT doing that I'm committed to doing daily is ...

And that one essential thing will generate appointments on my calendar by ...

I anticipate that my discipline around essentialism will be challenged when ...

And I will overcome this obstacle and recommit to my discipline by ...

Week 2: Loving What Is



Loving What Is by Byron Katie

When I asked my meditation teacher what book I should read to experience unconditional inner peace, without hesitation he suggested Loving What Is by Byron Katie. Not because it was a book on meditation, but because her turn around questions are profound. They force us to take a good hard look at our reality distortion field and acknowledge that our suffering isn't coming from what's actually happening, but rather our expectations and thoughts about what *should* be happening instead of what is. When you're experiencing difficulties with this program and/or your coaching business, please try this exercise for yourself. The book is fabulous, and these four questions help disrupt our thinking so that we can begin to see life as it is (not as we wish it to be).

The thought I currently have is:

Is it true?

Can you absolutely know that it is true?

How do you react when you believe that thought?

Who would you be without the thought?

Consider turning it around to explore the exact opposite.

The self: (e.g., turning "He is unkind to me" to "I am unkind to myself") The other person: (e.g., turning "He is unkind to me" to "I am unkind to him") The exact opposite: (e.g., turning "He is unkind to me" to "He is kind to me"). See what happens when you explore the exact opposite of the thought you currently have.

Week 2: Loving My Daily Habits



Falling in Love with Daily Habits (They Predict Where I'm Headed)

When I weighed 265 pounds, I was the heaviest I had ever been. I didn't like it when my health coach challenged me to look honestly at how my daily choices were affecting my health. It woke me up and had me pay attention to my daily habits. When I was honest with myself, I saw the truth. I was stress eating and drinking alcohol. I took extreme measures to turn it around, but I didn't have to. I later realized that it's the small things we do (or don't do) every day that can have an enormous impact on where we're headed.

MEDS-RX (Brendon Burchard)

While I knew my daily habits were important, it wasn't until I came across Brendon Burchard's list that I forever changed the trajectory of my life. MEDS-RX stands for Meditation, Exercise, Diet, Sleep, Relationships and X-Factor. For the purpose of this program, our X-Factor will be generating appointments on our calendars. To do that, however, it's helpful to examine the others. Where am I today? What small change could support me?

Meditation _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Exercise _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Diet _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Sleep _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Relationships _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

X-Factor (Generating Appointments) _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Week 2: Reflections on Love



What I'm learning about how love plays an important role in building my coaching business and financial freedom:



Week 3: Abundance



Abundance is Everywhere

Our abundance begins with ourselves. When you read the following words (preferably out loud), notice what happens in your body when you say: **I am enough**. Does this statement ring true? Is it a fact? Or do you notice resistance in your body that might imply, “Hmm, I’m not sure I agree with that.” No judgement. Just notice. Intellectually, we may believe that we are enough and yet some part of us is taking the “wait and see” approach as if our enoughness needs to prove itself to someone else. That part is where our scarcity lives. Scarcity is the opposite of abundance and it’s usually a big fat lie.

When I look out at the ocean, I can see all the way to the horizon. I know that even past the curvature of the earth, the ocean keeps going and drops deeper and deeper as it expands outward from the shore. What a powerful reminder of abundance. The sand beneath my feet shows yet another example. Miles in both direction I can see countless grains of sand. And in my biology class, my professor said that there are more atoms in a single grain of sand than there are grains of sand in the desert. Mind boggling. Look up at night and see how vast the stars are in all directions. We live surrounded by abundance. Some we can see, and others we don’t. Like the oxygen we breathe. It too is everywhere, yet we don’t see it. We know we are taking it into our lungs, but it’s so plentiful that we rarely give it much thought.

Exploring Abundance

To explore abundance is to see the truth. Everything we need is already inside of each and every one of us. Isn’t that amazing? Which brings me to another statement. Here again, check in with your body as you read this statement out loud: **All I need is within me now**. If your body is resisting this statement, see if you can discover what part of your body is resisting. That may very well be where our scarcity is being held and most likely alongside our previous illusion of “not enoughness.” What’s beautiful about this statement is that you can change the meaning by which word you choose to put the emphasis. *ALL I need is within me now* lands differently than *All I NEED is within me now* and even *All I need is within ME now*. You get the idea. I’ve had fun changing the power of these words by saying the sentence 7 times and changing which word I emphasise from the first to the last. Each time I repeat it, my scarcity gets just a little weaker and my desire to search for the answers “out there” diminishes even further.

Playing with Abundance

There are so many ways to play with your abundance. To feel fully abundant, you can seek out anywhere you feel scarcity in your life and consider what the opposite might feel like. For example, let’s say that you feel your scarcity most when it comes to money. Consider who you could give money to (and how much you’d need to give) in order to feel fully abundant. I’ve done this several times and each time it was a transformative experience. This can be as simple as paying for the next car’s order at a drive through window, or taking out money from the cash machine and giving money to the homeless, or going into a restaurant, looking for a family that seems to be just getting by and secretly paying for their meal with the waiter or restaurant manager. *What* you do is not nearly as important as taking bold action (i.e. *that* you do it).

Perhaps time is where you feel your scarcity the most. Schedule your next “sick day” and play hookey. What would you even do with a totally free day for yourself? Whatever it is, you would realize the truth about time. Specifically, that time is the constant and we are the variable. It’s our overscheduling that is the problem.

Application of Abundance to Your Coaching Business

In order to live in abundance, we must seek out where our scarcity lives. Time and money are usually the biggest culprits, but it can show up in many other forms. We can believe the lie that WE are not enough or that we don’t have enough or that we’ll never [fill in your blank]. When we realize the truth that “All I need is within me now,” we stop looking “out there” for the answer we seek and begin turning inward. The answers are already inside each and every one of us. Our job is to give ourselves enough time to explore, innovate and navigate these answers to ensure we take the courageous, loving action that abundance is asking us to take.

Week 3: Scarcity Thinking



The LIES and Illusions of Scarcity Thinking

Scarcity thinking is perhaps the biggest obstacle we all face. Rather than believing in the truth of our abundance, we fall into the illusion and believe the lies of scarcity. Scarcity is like a prison cell that we create in our minds and then forget that we are the ones who made up these illusions and the prison cell never even had a locked door. We are free to exit anytime we choose to **think different**.

“But Bill, you don’t understand,” I can already hear in response, “my scarcity is VERY REAL.” In a way, this is correct. We believe the lie of scarcity, so we begin to live our lives in alignment with this false reality that, eventually, becomes real. In other words, when we imprison ourselves in the lies of scarcity, we limit ourselves and our choices rather than breaking free from the illusion and lies themselves. **This is the work**. Let’s take ourselves out of generalities and get really specific.

I Am (NOT) Enough

Ah, the ultimate lie. Let’s GO BIG or go home, shall we? You were born whole, perfect and complete. You have been and will always be enough. Everything you’ve ever needed has been provided to you and most of what you’ve wanted has been thrown in for good measure. It’s the “...yeah, but” that is the problem. When we believe the lie that “I am not enough” we are putting “something” in front of our wholeness. Said a different way, “I will be enough when ... [fill in the blank]. So, if you have been imprisoned by this illusion until now, let’s go there together. What’s the thing you need to feel and experience your enoughness? Money? Fame? A Spouse? Children? Notice something. None of this is *YOU*. Money doesn’t change you. It magnifies more of who you already are. Fame is a double edged sword and can turn on you without warning. The spouse meant for you can only be found when you recognize your own wholeness. And children need us to be the best version of ourselves. Play with this for yourself. Nothing “out there” can satisfy or begin to compete with who you already are inside. You are whole, perfect and complete; you always were and will always be enough.

I Do (NOT) Have Enough

After reading the “I am (not) enough” above, doesn’t the “I do (not) have enough” already begin to ring hollow? Scarcity has us focus on our lack. Our “not enoughness” shows up only in comparison to others and the expectations we agree to put on ourselves. It sounds something like this. “By the time I’m [insert age], I should have [insert object]. See the lie? Expectations are premeditated resentments. The feeling of not having enough comes from the illusion that what you have is supposed to be different than what you actually do have. Whatever you focus on expands, so when you focus on lack, the feelings and experience of “lack” expands.

Pro tip: there will always be someone who has more than you. Stop comparing your current circumstances. Your enoughness is an *inside* job. Only when you feel and experience the truth of your abundance can you be free.

My Coaching Business Is (NOT) Enough

Let’s apply all this to your coaching business. Why does it feel like it’s not enough? Not enough clients? Not enough revenue? Not enough ... [insert something else here]. Do you see that these are all OUTCOMES!?! Remember, you are responsible for the **effort**, not the result or outcome. So consider this:

Your coaching business is a reflection of your current level of effort and what you choose to focus on.

Don’t like the current situation? Change the outcome by changing your focus and your level of effort. *Where* you place your effort matters ... a lot. Let’s say you hired a business consultant to audit your coaching business. The first place this consultant would look is at the amount of time you spend generating appointments on your calendar and how many appointments have been generated. If you’re spending too much time on things that won’t generate a single appointment on your calendar, this is where to shift your focus. While you’re not responsible for your results, that doesn’t mean you’re not paying attention to them. A single appointment on your calendar should be trackable to the efforts you took to make it happen. That becomes infinitely repeatable.

Week 3: Physically Abundant



Our Bodies Can Be a PERFECT Metaphor for Abundance

In her magical book, [*Relaxation in Action: Power & Comfort Through 3 Long Qualities*](#), one of my favorite humans, Mackenzie Hawkins demonstrates the Taoist philosophy *Wuwei*, which is “the not-doing, or doing less, that helps the doing go better.” It’s the love of essentialism all over again: Less, but better.

Stay with me here. The best example I found with our physical bodies is this concept of relaxation in action and the difference between effort vs efforting. You might be thinking: But, Bill, you say that your coaching business is supposed to be effortless and then you say it’s a perfect reflection of your effort and disciplined actions. You have to feel this one, not think it, and the perfect starting place is to feel it in your body.

I’d never tell an athlete that they could train without workouts. No way! Of course, we need consistent workouts where you break a sweat and burn calories. AND that won’t be sustainable if you have a straining, efforting mindset of “no pain, no gain.”

Rubber Band Person Exercise

Imagine you’re lying on the beach right now. Notice how utterly relaxed your body naturally becomes when allowing gravity to hold you while you lay down. Now imagine you’re a cat doing a morning stretch and it feels really good. With these simple ideas in mind, pretend that an alien came down from outer space and temporarily removed all the muscles in your body and replaced them with rubber bands. You are now a rubber band person. (This is a surprisingly apt analogy, since our muscles work like active rubber bands.)

As you bounce up and down like a rubber band person, your arms hang and sway with the gentle movement of your body. Twist and flop, swing and bounce in the natural flow of your movement. You’re no longer “fighting” the natural flow and movements of your body. You’re releasing resistance. You’re resetting the expectation from efforting to natural connection, bounce, and joy. If you applied this to running or weight-lifting, you’d even be faster and more powerful because you are moving with less resistance and in alignment to the flow of nature.

You’ve tapped into the abundance of an aligned and integrated flow state. Since it feels so good, happy, relaxed and joyful to exercise, why would we ever stop consistently working out?

Application to Your Coaching Business

I’ll say it again: When you connect to the core effortlessness of your coaching business, you’re on your way to total and complete financial freedom. You see, all abundance naturally exists inside of you and easily flows sustainably. But what we resist, persists. Resistance turns our efforts into the efforting that drains us. By relaxing that resistance, you’re in the flow.

When you’re in a deep flowstate you lose connection to time and space. We’ve all had those moments in our lives where we are so focused and present, we lose all sense of time. It’s truly magical. Obstacles appear and are instantly resolved. We know precisely what to do and how to handle situations that used to baffle us.

Getting into this flowstate is exactly how I wrote my last two books. They were effortless because I was simply channeling my inner abundance toward addressing core problems I knew others would appreciate (i.e. [*Three Rules of Marriage*](#) and [*Sage Business Development*](#)). This flowstate is also how I can reach out to 100 prospects in a week (or even in a single day) and generate 10 or more appointments on my calendar.

What is most important that I remember about my own inner abundance is ...

Week 3: Abundance of Clients



Do the Math

Exactly how many clients do you actually need? Here's the formula to figure it out:

_____ Annual Revenue I'm Committed to Earning As A Coach

_____ Monthly Revenue I'm Committed to Earning (Divide Annual Revenue by 12 Months)

_____ Current Monthly Fee per Coaching Client (What I Currently Receive or Will Receive)

_____ Number of Clients Needed (Divide Monthly Revenue by Current Monthly Fee)

What I'm noticing about this exercise is ...

If I want to grow my annual coaching revenue, where I need to focus my efforts is around ...

In order to generate the number of clients I want investing at the price I receive, I get to ...

One idea I could try that will help me generate more clients is ...

Week 3: Money Scarcity vs Abundance



Money is a concept. In many ways it's like energy. It can flow or be slowed by our mindset. When we experience money scarcity it often begins with our very thoughts about money. Yes, you are THAT powerful. The same is true with money abundance. While we'd like to believe that all of our money-related thinking is positive and supportive in building our coaching business, we all have specific thoughts about money that hold us back from what we say we want.

In this exercise, you are invited to be rigorously honest with yourself. Allow yourself to see how you hold each of the following statements without judgement or an expectation of what is "the right answer." Only with rigorous honesty can you begin to recognize what no longer serves you and shift your money mindset from scarcity thinking to abundance thinking.

This chart comes from T. Harv Eker, [Secrets of the Millionaire Mind](#). For each line, please circle either the right or left statement that feels true for you.

Life happens to me	I create my life
I play the money game not to lose	I play the money game to win
I want to be rich	I commit to being rich
I catch myself thinking small	I catch myself thinking big
I often focus on obstacles that stop me	I tend to focus on opportunities
I resent rich and successful people	I admire rich and successful people
Associate with negative, unsuccessful people	Associate with positive, successful people
Think negatively about selling and promotion	I promote myself and my value
I sometimes feel smaller than my problems	I usually feel bigger than my problems
I find myself to be a poor receiver	I find myself to be an excellent receiver
I prefer to be paid based on my time	I prefer to get paid based on my results
Think "either / or"	Think "both / and"
I tend to focus on earning income	I focus on my total net worth
I feel like I mismanage my/our money	I manage my/our money well
I work hard for money	My money works hard for me
I have let fear stop me	I usually feel the fear and do it anyway
Often times, I think I already know	I assume nothing so that I can learn and grow
I tend to be afraid of failure	I seek out opportunities to fail fast and learn

Next, please star (★) the statements on the left-hand column that you circled and would like to work on. Star (★) the abundance thinking on the right you'd like to further grow and expand.

What I'm noticing about my current money mindset is that ...

Week 3: Financial Abundance



What is Financial Abundance?

Exploring what true financial abundance is for you is one of the most important questions to be in and it's different for everyone. This is your opportunity to allow yourself the space and time to connect with the truth of your own abundance and with regards to your finances.

For me, financial abundance is ...

I experience my own financial abundance when ...

Whenever I fall into the illusion or outright lies of scarcity, I will remember that ...

One small step I will take today towards my financial freedom is...

Week 3: Speaking of Abundance



Abundance Is A Mindset. This Is How We Shift.

Intellectually and conceptually, we can understand the idea of abundance. We may even agree with it. Yet, our words reveal the scarcity that is hidden deep in our subconscious. How do we change our outdated programming? While there's no single way to do this, mantras can help; especially when we practice saying them at the same time of the day consistently.

Choose A Mantra That Resonates

Use the following list to inspire you towards your own mantra or feel free to use any of these to get started:

- I am enough.
- All I need is within me now.
- I am a money magnet.
- Money flows freely and easily into my life.
- I always have more than enough for my needs.
- I am grateful for the abundance all around me.
- Om Shrim Maha Lakshmiyei Swaha
- Om Vasudhare Svaha
- [Create your own that feels genuine and authentic].

Recommended Practice

There's no "wrong" way to practice your mantra, so choose any of the following best practices or create your own.

- *Meditation:* Sit comfortably, close your eyes and focus on your breath. Allow thoughts to pass without attachment to them. Speak out loud (or with in your inner voice) your selected mantra. Alternate silence with breath and spoken mantra. Repeat for a set amount of time (like 5 minutes) or until the mantra has been repeated a specific number of times (as many as 108).
- *Walking Mantra:* Instead of listening to a podcast or music, incorporate your mantra in your morning or evening walk routine (with or without your spouse, friend or pet). This can be done out loud or silently in your mind. Notice how your energy changes as you move and speak your mantra.
- *Brushing Your Teeth:* Rather than mindlessly brushing your teeth, write your mantra on a sticky note and post it on your mirror to remind you. Read it out loud during the roughly 2-5 minutes you're brushing your teeth in the morning and again at night.
- *Working Out at the Gym:* Do you have a regular habit of lifting weights and building muscle? Instead of counting your reps, say your mantra. This can include reps on equipment or even laps in the swimming pool. It's more challenging with Yoga or other group classes where the instructor is guiding you. Difficult, but not impossible. When you notice you've drifted from repeating your mantra, simply come back to it.

I believe my best plan of action for incorporating a mantra into my daily routine is to ...

Week 3: Practicing Abundance



Moving from Scarcity to Abundance Takes Practice

In speaking with my friend and fellow coach, Ron Kertzner, he stressed the importance of cultivating the inner stance to consistently make the choices that support financial freedom. This is his morning preview and evening review that can help us notice and transform the inner patterns and build our neural networks.

Morning Preview (5 to 7 minutes)

Feet on the ground. Hand on the heart if comfortable. Slow the breath. Heart focused breathing.

I don't need to solve my financial future in this moment.

I am here to become conscious of creating it.

Imagine a time when you have already reached the level of financial freedom that matters to you. Don't begin with the bank statement. Notice who you have become.

How do you wake up?

How do you relate to work?

What choices are now available?

How do you serve?

How do you relate to money when you're no longer frightened by it?

For these few moments, I don't imagine financial freedom as something I am chasing. I experience it from within.

Say your preferred mantra (see "Speaking of Abundance") And choose the quality of being from which you choose to act (such as courage, love, abundance, generosity, creativity, discipline, trust, curiosity, etc.) Feel this quality now - not after the result occurs. Feel it as if it's already happened.

What would the financially free version of me do today?

(Perhaps make the call. Say no to something. Create something valuable. Have the uncomfortable talk).

And choose one concrete action: Today I will _____.

Notice any fear that shows up and offer kindness to the part of me that learned to be afraid ... and do it anyway.

I can be compassionate with my fear without allowing fear to make my financial decisions.

Evening Review (5 minutes)

The evening practice is deliberately not about whether I "manifested" enough money today. That can quickly become another performance metric. Instead, the review asks whether I practiced becoming the person capable of creating and stewarding greater freedom.

- *Where did I live today from the person I am becoming?*
- *What did I do, however small, that expressed financial freedom, stewardship, courage or generosity?*
- *Where did fear or scarcity take over?*
- *Where did I avoid, grasp, compare, procrastinate, undersell myself, overspend or be money scarce?*
- *Can I meet that moment without judgement? Of course fear arose. I'm learning a new relationship with money. Nothing needs to be punished. I can learn. I will grow. I will learn from my mistakes.*
- *What did today teach me?*
- *What wants to happen tomorrow?*

I release today's results. I am becoming someone who creates from possibility rather than fear. I rehearse tomorrow not from anxiety about what might go wrong, but from the felt experience of who I choose to be. My aim is not to eliminate fear before acting. It's to create a new relationship with courage, love and abundance. I will keep choosing from the person I am becoming.

Week 3: Reflections on Abundance



What I'm learning about abundance and its impact on my coaching business is ...



Prosperity



Week 4: Prosperity



Exploring Prosperity

What does it mean to be prosperous? Deep and fulfilling prosperity is a type of continuous growth that carries our forward momentum with ease. When we see that our prosperity is aligned with our purpose, we experience a flow state and time begins to disappear. How we feel about the expansion of our coaching practice matters. Do we experience a kind of sustainable growth? Or are we exhausted by our daily routines and ongoing efforts?

Once we have the right kind of momentum in our coaching business, we experience a feeling of effortlessness. Opportunities begin to emerge seemingly out of nowhere. What's really happening is that the consistent right efforts we put into our daily practice are paying off in ways we could have never anticipated.

This is a natural byproduct of focusing only on what is truly essential (and letting go of the rest). To be truly prosperous is to feel invigorated by the work we are doing in the service of others. When our actions feel effortless, they become infinitely sustainable. This is how we prosper from the courageous actions we took in deep love and compassion for our niche and how we invite abundance into our practice.

Refining Our Prosperity Practice

As we enter the fourth week of this program, it's important to examine: What's working? What's NOT working? What do we get to remove? What do we get to add? Our daily habits reveal where we choose to place our focus. Some of the actions we take every day are working. When we can isolate what's working, we can place more focus in these areas and further refine what, specifically, is working and how best to continue.

While not attached to our results, it's important to continue to examine our practices to ensure they are aligned with our desired outcomes. When we experience forward momentum, often small refinements are enough. When we're not sure our efforts are producing the results we seek, it's important to stay curious and take a closer look at what changes can be made to maximize our outcomes. When we're not sure the root cause of our success, it's difficult to make refinements. Staying curious keeps us open to different possibilities to consider.

Playing with Prosperity

Business is consumed with uncertainty. If we wait to have all the answers before making decisions, we'd rarely take any actions at all. Rather than hesitate, we would be wise to decide on a course of action based on the available information. Understanding that we don't see the full picture nor do we have all the information we'd prefer to have, each action we take reduces our uncertainty just a bit. With each action, we receive more clarity and can better understand if we're headed in the right direction ... or not. This is why failure is a much better teacher than success. When something isn't working, it's relatively easy to correct course. When we're not sure WHY something is working, it's more challenging to have confidence in our decisions and continued actions. So, let go of the need to know. Instead, do your best and course correct along the way.

Application of Prosperity to Your Coaching Business

It is said that when a plane is flying in the air it's off course more than 90% of the time. That is to say, there are many factors at play that push a plane off its intended course. Rather than being perturbed by this, most pilots constantly make minor adjustments to the winds, turbulence, weather and other factors that knock them off course. These minor course corrections ensure the plane ends up in its intended destination.

The same is true in your coaching business. When we're clear about where we want to end up, we can keep making minor course corrections that will ensure we achieve our desired outcomes. And the changes we make should be *minor*. Imagine how nauseating it would be as a passenger with a pilot making major course corrections all the time. Experienced pilots make such minor course corrections most of us barely notice them.

Consider what minor corrections you could make to your coaching business while still traveling to your intended destination. This is why our daily habits are so important. What we do every day is the best predictor of success.

Week 4: Prosperity Practice

What's Working for Me in the Tao Cha Ching program is ...

What's NOT Working for Me in the Tao Cha Ching program is ...

I'm Committed to Removing the Following from my Daily Habits ...

And Here's What I Get to Add to My Daily Habits ...

What I'm Really Noticing in the First Three Weeks of the Tao Cha Ching Program Is ...

Week 4: Refining My Daily Habits



Daily Habits Check-In

Half way through the Tao Cha Ching program, it's important to see which of our daily habits are working as originally intended and which of our daily habits never quite took hold as we intended. No blame or shame here. The purpose of this exercise is to look from the vantage point of continued improvement.

MEDS-RX (Brendon Burchard)

A quick reminder that Brendon Burchard's list of daily habits forever changed the trajectory of my life. MEDS-RX stands for Meditation, Exercise, Diet, Sleep, Relationships and X-Factor. For the purpose of this program, our X-Factor will be generating appointments on our calendars. To do that, however, it's helpful to examine the others. Where am I today? What small change could support me?

Meditation _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Exercise _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Diet _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Sleep _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Relationships _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

X-Factor (Generating Appointments) _____ (Rate 1-10)

What's currently working? What small change could I make? How will this change help me?

Week 4: Niche Contemplation



A Note About Why Niche & Offer NOW vs. Week 1

“What gives, Bill?” I hear you asking. “Shouldn’t we have focused on our niche and offer three weeks ago?” In a word, NO. For the past three weeks, the focus has been on building momentum. We don’t want you sitting on the sidelines trying to figure everything out before you take action. We want you in the market, having conversations, creating opportunities, and paying attention to what comes back. The market is going to tell you a lot more than sitting in your head trying to figure it all out. Your niche and offer should evolve as you learn. See who is responding. Listen to what people are telling you. Then use that information to refine your direction.

What experiences have significantly shaped my life and who I am today?

How have my life experiences prepared me to help others?

What challenges have I overcome that I can use to help others?

Who do I feel a strong connection with?

At the end of my life looking back, who did it matter most that I coached?

Based on these answers, I believe my niche is ...

Week 4: Offer Contemplation

In thinking about my niche, the following are several outcomes they would like:

What outcome do they need most?

What skills or talents do I have that support this outcome?

What's a specific problem I feel passionate about addressing in support of my niche?

I believe my offer to my niche should be ...

And to make my offer irresistible, I might further refine my offer to be ...

Week 4: Generate Contemplation

To date, what I've noticed about my ability to generate appointments on my calendar is that ...

Who could refer me to a possible new coaching client?

Who else could refer me to a possible new coaching client?

Who is one person I could reach out to and send a message to today?

Who else could reach out to today?

Who haven't I reached out to in a while? Who would really appreciate a message from me?

When it comes to generating more appointments on my calendar, what I need to remember is ...

Week 4: Convert Contemplation



As I imagine wrapping up a powerful discovery call, what am I feeling as I begin to shift the conversation to making my offer?

What fears come up at the moment I'm about to make my offer?

What would help me shift my focus from my own fears, uncertainties and doubts to my client's needs?

Who am I thinking about most when I make my offer? What focus would produce the best outcome?

What emotions do I want to feel after I have courageously delivered my offer?

What do I want most for this beautiful human I just made my offer to?

How can I best honor the needs of my client, even when they are a "No for Now?"

Week 4: Core 4 Contemplation



When reflecting on the core four of my coaching business (i.e. my niche, irresistible offer, generating and converting appointments), what stands out the most for me is ...

Week 4: Essential & Effortless Prosperity



In order to continue to focus on what is truly essential in my coaching business, I'd like to remember that ...

So that I can focus on what's truly essential, I'm willing to LET GO of the following ...

What I currently experience as "Hard" or "Difficult" in my coaching business is ...

And some ways to make these things easier so that my coaching business feels effortless would include ...

Week 4: Reflections on Prosperity



The key lessons I'm committed to applying when it comes to prosperity in my coaching business are ...



Week 5: Gratitude from Bill



Thank you! You have my utmost respect and deep gratitude for participating in the Tao Cha Ching program. For the past 4 weeks, you've played full out. You've felt your fears and did it anyway. You played with the boundaries of your comfort zone and found the courage to go beyond. I admire your commitment to eradicating scarcity and your continued commitment to tapping into your infinite abundance. I feel the love from deep inside you and how you choose to share it with others.

As you acknowledge your own progress, I have the distinct pleasure and privilege to take this moment to express my heartfelt gratitude for your dedication, commitment, and energy throughout this first month together. I see you. I know what it takes to participate in Tao Cha Ching, and I love the progress you've made.

From day one, your willingness to embrace the difficulties of building and refining your coaching businesses has been nothing short of inspiring. You brought your unique talents, perspectives, and aspirations to every session, creating a rich tapestry of collaboration and growth. It has been awe-inspiring and an absolute privilege to witness the courage with which you confronted obstacles, the creativity you poured into finding solutions, and the passion you showed for making a meaningful impact in the lives of your clients.

Together, we asked the W.I.N. question, "What's Important Now?" And when seeking answers, we used H.O.W. to ensure we're being fully Honest, Open and Willing to embrace that which had previously been difficult or seemingly impossible. And wow, those daily habits. I urge you to take this moment to reflect back on just how far you have come.

Who knew that a 1% improvement practiced each and every day for just 4-weeks would have you arrive to this spot where you are right now? You got exactly what you needed at this very moment in your life. The skills you developed will be here long after this program draws to a close.

The breakthroughs you've achieved over these weeks are a testament to your hard work and resilience. Whether it was mastering new strategies, refining your messaging, or stepping outside your comfort zone. You demonstrated what it means to be committed to growth—both as a coach and as a person. Your willingness to support and uplift one another, even amidst your own challenges, shows what's possible when we choose to come together as coaches.

Thank you for trusting the process, for showing up with an open mind and an open heart. Thank you for sharing your dreams and struggles so authentically. Your contributions have not only enriched your own journey but have also created a space where others could grow alongside you. The connections forged and the insights gained in this program will undoubtedly leave a lasting legacy, both in your coaching practices and in the lives of those you touch for years to come.

As you move forward, I hope you carry with you the confidence, clarity, and momentum that you've built here. Remember, "All I need is within me now!" You have the tools, the community, and the inner strength to overcome any challenges that come your way. The answers are not "out there." The answers are and have always been inside of YOU!

The obstacle is showing you the way. Your impact as a coach continues for as long as you choose to lead with your heart, and I cannot wait to see how your businesses flourish and how your work transforms the world around you. Once again, thank you for your trust, your energy, and your dedication to this program. It has been an honor to support you on this first month of your journey, and I am excited to see all that you will achieve in the months and years to come.

With Love & Gratitude,

Bill Carmody

[Linkedin.com/in/billcarmody/](https://www.linkedin.com/in/billcarmody/)

Week 5: Progress, Not Perfection



Importance of Focusing on Progress, Not Perfection

Perfection is an illusion and an unattainable result. It is therefore the weakest standard by the very nature that perfection is unachievable. Progress, on the other hand, can be difficult to recognize in ourselves. When we're in the middle of something, it's much easier to focus on the gap between where we are and our desired outcome. Progress has us focus on enjoying the journey and noticing who we are becoming along the way. It's more challenging to do, and yet it ensures our continued growth over time.

When I was participating in my first full Ironman (140.6 miles or 226.3 km), the only way to continue was to focus on my progress and fully commit to being in the moment. Just the first 90 minutes of what would be about a 12 hour day of a peak performance triathlon required my full presence. This is when I swam 2.4 miles. Then the next 6 hours would be on my bike for 112 miles, followed by a full 26.2 mile marathon. The whole day was about doing my best and giving it my all and not comparing myself to the other athletes. What I celebrated was being in an Ironman at all and the 6 months of daily 3-hour training sessions that allowed me to participate.

Failure

I trust that you have likewise given Tao Cha Ching your best effort. Assuming that you have, then at some point you've experienced what some would refer to as "failure." If you have, then I want to sincerely congratulate you! We learn more from our failures than our success. Failure means you've stepped outside your comfort zone and learned some valuable lessons. The most successful people all have significant failures in their life and they use failure to support other people – not to have others avoid their costly mistakes, but rather in the context of sharing what they learned from their failures. The more we are willing to fail, the faster we will learn and grow. Failure lets us know we're on the right path, innovating and finding our way forward.

Acknowledging Progress

Consider how you'd like to acknowledge your own progress in the Tao Cha Ching program. What new skills have you developed? What new approaches have you tried? What new resilience do you now have? Even something seemingly insignificant can begin to develop entirely new muscles that will support your future growth. For example, have you stopped taking rejection personally? If so, imagine the long-term incredible impact this will have on your coaching business. When hearing the word "no" doesn't deter your efforts, you become unstoppable. Moreover, the simple act of celebration reinforces the behaviors you want to see more of in your coaching business. All of this is progress! The kind of progress worth acknowledging and celebrating.

Progress Leads to Growth and Even MORE Progress in Our Coaching Businesses

Momentum is about taking consistent right action. Momentum in your coaching business comes from the progress your making consistently on a daily basis. Sometimes this progress is virtually undetectable. Other times, the progress leads to major shifts and breakthroughs in our businesses. Big or small, progress leads to more progress and creates a flywheel of growth and prosperity. This flywheel effect, when consistently maintained, leads to effortlessness. As long as we continue with the daily habits we have established for ourselves and our coaching business, this momentum will continue.

See how this is totally different than the illusion of perfection? Whatever we focus on, expands. So if we choose to focus on our lack from our perfectionist ideal, we will expand our feelings of lack and grow the gap between where we are in our coaching business and where we want to be. Conversely, when we focus on our progress, this leads to even more progress in our coaching business. This focus helps us grow in predictable ways.

This week, we focus on acknowledging the progress we have made and are currently making. This acknowledgement creates a growing positivity vortex that further reinforces our own courage, love and abundance inside ourselves and inside our coaching business. As we acknowledge our progress, we reinforce where we choose to place our focus as we streamline our efforts.

Week 5: Acknowledging My Progress



The progress I'd like to acknowledge in my coaching business is ...

(i.e. daily habits, focusing on what matters, willingness, not taking rejection personally, resilience, acceptance)

When I remove the illusion of perfection, what I'm able to recognize in myself is ...

(i.e. I'm exactly where I need to be, I am enough, value I deliver, impact I've already made, continued growth)

When I reflect back over the past 4 weeks, something I'm really proud of is ...

(i.e. seeing what I'm capable of, willingness to trust myself, how resourceful I am, solving problems, pivot, etc.)

Week 5: Being Who I Am



What I Accomplish Is Less Important Than Who I Become

When a prospective client says “HELL YES!” to our irresistible offer, it’s easy to mark the accomplishment. When the money hits our bank account the “Cha Ching” feels amazing. Unfortunately, there’s not enough signals that we are growing into the whole, perfect and complete person we’ve always meant to be. In fact, the more we allow ourselves to BE ourselves, the less we recognize the incredible changes we’ve embraced. This is our opportunity to reflect on the changes we’ve made this past month in order to become who we’re meant to be.

In the past month, the change in myself that I most deeply recognize is ...

Something important to me that I’m still working on in order to be my most authentic self is ...

In the coming months, I know I’ve embraced my whole, perfect and complete self when I notice that ...

Week 5: Be | Do | Have



Understanding Be | Do | Have Is the Correct Order and Sequence

Know why people play the lottery? They (incorrectly) believe that when they HAVE millions of dollars, they will DO what millionaires do and BE financially free. Instead, they tend to spend it all and go bankrupt. That's like assuming you can transplant a tropical flower into a desert. We can't. It won't survive. Instead, we must focus on who we must BE in order to DO and then HAVE the outcomes we want.

In order to BE financially free as a coach, I must embody financial freedom and BE:

(i.e. resilient, resourceful, curious, courageous, loving, discerning, clear, concise, conscious, abundant, joyful)

As a financially free coach I regularly take the following actions and DO:

(i.e. meditation, exercise, diet, sleep, relationships, appointment generation, spend less than I earn, etc.)

In order to HAVE financial freedom, what I'm noticing about my BEing and DOing is ...

(i.e. who I am matters, consistent right actions come from inside me, I won't keep what I have without BEing)

Week 5: To BE or Not To BE



Who I Choose to BE Matters

A way of being is how you choose to show up, act, and feel in the world. It shapes your daily life and guides your choices. It's amazing to think that all this work on our coaching business directly impacts our ways of being. It makes sense. After all, our businesses are ultimately a reflection on who each of us are and how we choose to show up. The law of attraction is infinitely more powerful than any marketing or promotion we pay for.

Who I choose NOT to BE Also Matters

Just as important is who we choose NOT to be. Having clarity about the ways of being we don't want is equally important. All of this layers up to our values as coaches. When we are clear who we do NOT wish to be, we're also shaping the negative space so that who we are shines bright for anyone paying attention.

Ways of Being That Are Important to Me Include Being ...

- **Loving:** Melt indifference with deep love and empathetic joy.
- **Discerning:** Rather than criticizing and judging, discern what's right.
- **Kind:** Treat all people with care and compassion.
- **Compassionate:** Forgive mistakes and assume good intentions.
- **Trustworthy:** When the words match the deeds, trust is built and maintained.
- **Curious:** Ask good questions and seek to learn from others.
- **Present:** Stay focused in this moment rather than thinking of the past or future.
- **Calm:** Take a deep breath and keep a steady heart when things get hard.
- **Courageous:** Face fears, feel these fears and try new things anyway.
- **Grateful:** Notice and thank life for the many good things in life.
- **Patient:** Wait for time to pass without reacting in anger.
- **Honest:** Speak the truth with care and a clear mind.
- **Open:** Flexibility leads to growth especially when outside the comfort zone.
- **Willing:** The way is revealed to those who are willing to learn and take action.
- **Humble:** Acknowledge the needs of others leads to continuous growth. "Humility is not thinking less of myself, it's thinking of myself, less."

Ways of Being That I Choose NOT to Be Include ...

- **Selfish:** Putting my own wants above the needs of others.
- **Dishonest:** Lying, hiding the truth, or deceiving myself.
- **Fearful:** Worry or anxiety that drives poor choices and defensive actions.
- **Resentful:** Holding onto chronic anger, bitterness, or grudges.
- **Egoic and Prideful:** Arrogance, false pride, and a sense of self-importance.
- **Angry:** Quick temper and aggressive reactions.
- **Self-Pitying:** Playing the victim and dwelling on misfortune.
- **Jealous and Envious:** Wanting what others have or resenting their success.
- **Impatient:** Demanding instant results and hating delays.
- **Intolerant:** Judging others harshly while excusing myself.
- **Lazy:** Avoiding responsibilities and lacking motivation.
- **Controlling:** Trying to force people or situations to go my way.

Week 5: Reflection on My Ways of Being



After reviewing the previous list, what I'm noticing about who I already am is that ...

And the ways of being I would like to incorporate into my continued growth include ...
(And why that's important for my coaching business ...)

As for the ways of being I don't want showing up, I will pay more attention to ...
(Consider the people, places, and things that trigger the parts of us that no longer serve us. How to let go?)

Week 5: Reflections on My Progress



The key lessons I'm committed to applying when it comes to my continued growth and progress in my coaching business are ...



Coachonomics™



Week 6: Coachonomics™



What is Coachonomics?

Understanding the economics of your coaching business leads to your financial freedom. Simply put, what gets measured gets improved. Take this free 6-week course. What's your return on this investment? From a purely economics perspective, you invested zero dollars to participate. If you generated no clients during this past 5-week period you gained experience and lost zero dollars from a financial perspective. Conversely, if you generated even a single client during the past 5 weeks, your returns are both measurable and significant. For example, if that single client will produce \$500 to \$1,000 in coaching revenue per month for the next 6 months, you spent zero dollars and generated \$3,000 to \$6,000 in future revenue.

Now, let's look at all the alternatives you had available to you. For the same single client, you could have invested in any number of marketing technologies or even partnered with a company that paid you \$65 per coaching hour while they received the \$500 per hour rate. That's an opportunity cost of \$435 per hour. As you look to grow your business you might also consider various out-of-pocket expenses such as hiring a virtual assistant, an appointment generator, website development, Facebook or Instagram Ads, LinkedIn Premium, etc.

Once you add up all these costs on a monthly basis, you may be spending more money on your marketing, advertising and technology costs than the new client revenue being generated. Running a business this way is referred to as operating "in the red" or "upside down." It leads to increased debt and the end of your business.

Examining the Business End of Our Coaching Business

Most coaches didn't knowingly sign up to be an entrepreneur when they decided to be a coach. And yet, the reality is that sustainable coaching requires both. The more time we spend building and growing our coaching business, the bigger the impact we can have in the world and the more sustainable we become as coaches.

Alternatively, what we resist, persists. When we choose not to lean into the business development process of our coaching business, we tend to struggle and find ourselves at the whim of others who claim to be helping us. This is frustrating as our deep desire to coach others is marginalized by those who present the "easy alternatives" and seemingly quick fixes to our problems. They aren't and end up costing us more money.

Investing in Ourselves

When we accept that "no one is coming to save us," we begin to build our own resilience. We learn by taking action and measuring our results. While we are responsible for our efforts (and not our results), it is important to pay attention to our results. What's working? What needs improvement? Stay curious. From here, we learn how best we can improve our results over time and maintain our sense of ease and a continuous flow state.

Earn While We Learn!

These past 5-weeks have created a combination of momentum and foundational learning that each of us can continue to apply to our coaching businesses. While the concepts are simple, for most of us they are not "easy" – at least, not yet. Like any skill, the early stage development can be the most challenging part. So congratulate yourself for following through and getting to this stage of the program.

Even if you didn't secure a single client in the past 5 weeks, trust that you have begun to strengthen and grow your entrepreneurial muscles. Each hour you spend generating appointments on your calendar generates key insights and strengthens your entrepreneurial muscles. Before you know it, problems that used to perplex and confound you suddenly seem easy to overcome and the solutions appear obvious and straightforward. More to the point, you are earning revenue while you are learning how best to build your coaching business.

The question to be in this week is: **How you want to continue this momentum going forward?**

Week 6: Reflecting on My Coachonomics™



When it comes to making investments in my coaching business, I typically care most about ...

(i.e. how much it costs, if I can afford it, the projected results, the problem it solves, or something else entirely)

Before participating in the Tao Cha Ching program, something I was NOT paying attention to was ...

(i.e. my time & the Rule of 168, asking for referrals, the number of outreaches I made each day, niche, offer, etc.)

In the next 12 months, I'm fully committed to generating ...

(i.e. number of clients, amount of coaching revenue, a sustainable coaching business, ease in development)

And what supports me in the generation effort includes ...

(i.e. accountability, community, mentoring, coaching, clarity, insights, support, something else)

Week 6: Celebration & Gratitude



When I reflect back on the last 5-weeks of effort, something I can be proud of is...

(i.e. feeling the fear and doing it anyway, recognizing my self-worth, building my business development muscle)

When it comes to my coaching business, I'm grateful ...

(i.e. to be learning foundations, for my acceptance of what is, peer support, access to experts, daily habits, etc.)

Something I can really celebrate about the last 5 weeks of this journey is ...

(i.e. my honesty, openness, willingness, experiencing what's important now W.I.N., how I participated, growth)

And one thing I will continue to celebrate long after the conclusion of the Tao Cha Ching program is ...

(i.e. who I have become, daily habits supporting my growth, friends I've made along the way, actions, etc.)

Week 6: Coaching Investments Worksheet



Investments I’ve Already Made in My Coaching Business

If you owned a retail store, you’d periodically “take inventory.” That would include having each of your staff physically counting the items available in your store. When was the last time an inventory was made around the investments made in your coaching business? Chances are, there have been several and this worksheet will help identify and list these investments.

Description	Investment Amount	Why I Invested	Value Created
Coaching Certification			
Website			
Newsletter			
Premium AI			
Public Relations			
Podcast(s)			
Business Cards			
LinkedIn Premium			
Instagram Ads			
Mobile App			
Consultant(s)			
Coach(es)			
Training Programs			

Week 6: Coaching Investments Reflection



What I'm Noticing About the Investments I've Already Made in My Coaching Business is ...

Consider things like: Where do I tend to invest? What do I tend to outsource? How has it helped me or distracted me? What revenue has it produced or contributed to? What am I learning about myself and the efforts I've historically made to grow my coaching business?

Week 6: Acceptance & Letting Go



Forgive Ourselves and Let Go of the Past.

Awareness is the first step towards acceptance. None of this was designed to make us regret the past or wish to shut the door on it. Rather, it's designed to see our patterns and provide an opportunity to shift these patterns. In order to quiet the negative voice in our heads, we actually need to *listen*. Hear the scared child inside each of us terrified about the future. Provide comfort. Assure them and let them know they are safe. We've got it.

The negative voice inside my head screaming to be heard wants me to know that ...

What they are REALLY saying is that they are scared and afraid that ...

How I can best soothe these F.E.A.R.s (False Evidence Appearing Real) would be to ...

Week 6: True Needs Analysis



Consider TODAY and How Best to Proceed.

Acceptance is the answer and a powerful step in the right direction. “This is what’s so.” So what? Now what? This is the opportunity to consider where we grow from here.

Having Acknowledged My F.E.A.R.s and Letting Go of the Past, I Now See That What I Need Today Is ...

(i.e. to believe in myself, trust my gut, accept where I am in my journey, rigorous honesty, a W.I.N. strategy, etc.)

In the context of “All I Need Is Within Me Now”, I understand that what my coaching business *really* needs ...

(i.e. my time, consistency, daily habits, resilience, focus, belief in myself, fewer distractions, essentialism, etc.)

Week 6: My Plan of Action



This is My Moment to Decide the Future of My Coaching Business

The word “decision” comes from the latin root word “caedere” which means “to cut” and de is “off.” When deciding about the future of our coaching business, it’s just as important to eliminate as it is to add back in. Some would argue that it’s more important what you cut out than it is to add anything back in. This is our opportunity to explore both.

What I’m Committed to “Cutting Out” of My Coaching Business is ...

(i.e. unsolicited advice, shiny objects, responding to SPAM emails, social media doom scrolling, avoidance, etc.)

And what will support me to remain focused and continue to build my coaching business is ...

(i.e. prioritizing W.I.N., daily habits, effortless, essentialism, accountability, structure, community, support, etc.)



Financial Freedom Resources



Appointment Generation Guide



The Courage to Do What You Love. The Abundance to Do It Sustainably!

You are enough. Let's start with this critically important point. You don't need anything but YOU. No artificial intelligence, no technology subscriptions, no advertising or marketing budget, none of it. Give yourself one to two hours a day and you'll be amazed before you're halfway through the Tao Cha Ching program. All you need to do is **BLOCK THIS TIME** on your calendar and protect it.

Step 1: Block 1-2 Hours On Your Calendar with a Recurring Calendar Event

Consistency is the key to progress and the outcomes you seek. Our daily habits create our destiny. Your financial freedom begins with a simple recurring calendar for the same time every day. Set the calendar appointment to repeat daily and choose a new color you don't typically use on your calendar.

Step 2: Create a Powerful Name for This Block of Time On Your Calendar

When you see "Generate Appointments" right now, you'll feel a bit sick to your stomach. You're not there yet. So try something much different that's juicy and inviting. What if your calendar read, "Live your life's purpose. Be a servant leader. Give Them What They Need Most **RIGHT NOW**." The wording is important because it sets the tone for what you're going to be doing for 1-2 hours and reminds you why this block of time is so important.

Step 3: Change Your State Before You Begin

Imagine you just had an argument, opened the mail to discover an electronic speeding ticket, or got a text from your best friend cancelling your plans for dinner. How do you think your results will go when attempting to generate appointments on your calendar? Now, **SHAKE IT OFF!** Listen to your favorite song and **DANCE** it out. Or give yourself 5 minutes to just breathe and meditate. Whatever gets you to be the best version of yourself, that's what your coaching business need from you in these moments.

Step 4: Remind Yourself WHY You're Doing Any of This

Consider your niche. **WHO** you are reaching out to matters a great deal and so does your irresistible offer. **WHAT** your niche needs is precisely what you have a superpower to deliver. Know it or not, they really need you right now in this moment. Your outreach alone can change their state and make them have a much better day ... even if they decline your offer.

Step 5: Take BOLD Action

This work requires courage. Go ahead and allow yourself to feel the fear. It shows you care that you're willing to get uncomfortable. Once you've felt the true and authentic fear, acknowledge your fears and do it anyway. That's **BOLD**. That's **COURAGEOUS**. That's who **YOU** are. Remember, "What other people think of me is none of my business." And, "I'm responsible for my efforts today, not my results. I'm committed to my coaching business."

THIS. This is the Courage to Do What You Love And the Abundance to Do It Sustainably!

Remember, if this work were "easy", then we'd all already be financially free coaches serving the planet at the highest level. We'll get there. Today is about taking bold action, being a servant leader and trusting the process. What we do each and every day determines our outcomes. This is the way of financial freedom. This is Tao Cha Ching. Let's **BE** this and then let's **DO** this so we **HAVE** it.

H.O.W. to Generate Appointments



Leverage the 5 Categories to Generate Appointments

Begin with the highest potential to generate immediate new client wins: Referrals. Only once you've tapped out on asking for referrals, then go to the next highest potential: Direct Outreach. If you only focused on these two throughout the Tao Cha Ching program, this would be enough.

Small Steps for Generating Referrals:

- ☐ **Make a list.** Start with any past clients you could ask for referrals. Consider friends and colleagues.
- ☐ **Draft an email.** What email might you send to ask for your referral? What's authentically YOU?
- ☐ **Draft a direct message.** How might you reach out via a direct message on social media?
- ☐ **Reach out.** Begin reaching out to those individuals who could give you referrals.
- ☐ **Schedule follow-up.** "One and done" rarely works. How will you remember to follow up?

Small Steps for Direct Outreach:

- ☐ **Make a list.** Who would you like to share your irresistible offer & schedule a discovery call?
- ☐ **Begin a search.** Use LinkedIn's search feature to identify prospects. (1st or 2nd Connections?)
- ☐ **Draft a DM.** Begin with a short message with your irresistible offer & calendar link.
- ☐ **Reach out.** Begin reaching out to prospects and testing your message via text and social media.
- ☐ **Schedule follow-up.** "One and done" rarely works. How will you remember to follow up?

Small Steps for Networking:

- ☐ **Research.** Review upcoming networking and meet-up opportunities in your area.
- ☐ **Sign up.** Register to attend and participate in networking events happening now.
- ☐ **Create a QR code.** Make it easy to W.I.N. with your calendar link & QR Code on your business card.
- ☐ **Stand out.** Shop for a "loud" item like a bright red or yellow hat so you're easily recognized.
- ☐ **Schedule follow-up.** Block time the day afterwards so you remember to follow up.

Small Steps for Writing:

- ☐ **Article titles.** Come up with several article titles relevant to your niche. Think 20 to 50.
- ☐ **Draft an article.** Draft one article that your niche would love.
- ☐ **Publish.** Post one article with the call to action via your calendar link (progress, not perfection!).

Small Steps for Speaking:

- ☐ **Research.** Use LinkedIn's search feature to identify conference organizers.
- ☐ **Draft session titles.** Draft a few session titles and relevant descriptions. What's most relevant?
- ☐ **Reach out.** Begin reaching out to conference organizers with your message.

"Do Not Seek to Follow In the Footsteps of the Masters. Seek What They Sought." Matsuo Bashō

Hold these suggestions loosely and consider the underlying principles rather than specific tasks to complete. Check in with yourself and see what feels right for you. It's important *THAT* you generate appointments on your calendar. It's not important *HOW* you generate these appointments. Whatever actions you choose to take should feel sustainable for you. The more you do it, the easier it will be. Ease leads to frequency and consistency which is what we're ultimately seeking for your coaching business.

Even *More* Ways to Generate



Additional Small Steps to Generate Appointments

There is no limit to the kinds of committed actions you can take in order to generate a single appointment on your calendar. Remember that 10 qualified appointments typically results in the acquisition of a new client, so getting really creative about *how* to generate appointments is worth your time – both in your creative ideation as well as taking consistent bold actions.

Bold Actions Most Coaches Rarely Consider, Let Alone DO:

- ❑ **Create Your Top 100 List.** Take the time to consider your ideal client – who you really want to work with as a coach. Now write down the first 10 names that pop into your head. Then take one of those names and think about “their friends” who fit your ideal customer profile. Keep going until you have 100 names on your list. Put them in a spreadsheet so you can track outreaches to each of them.
- ❑ **LinkedIn Network List Building.** This is where LinkedIn is powerful. Even if you only have a few people you’re connected with, you can still search based on detailed descriptions of your niche. This can include geography, titles, company names, industry, certifications, or other criteria. Use these searches to build and prioritize your outreach list of prospective clients.
- ❑ **Go Door to Door:** Introduce yourself to your neighborhood. Most of your neighbors probably don’t know that you’re a coach. Give them a business card with your QR code to your calendar. Get curious on how you can help them and how best to be a great resource for them.
- ❑ **Host a Party.** Party with a purpose. Most people are happy to attend and if they learn something important in an area they are struggling, they are likely to want to meet you one-on-one for a more private conversation, which you can offer up to them as part of your professional discovery call.
- ❑ **Combine Other Skills.** Do you know how to knit? How about a “Stitch and Bitch.” This is a fun way to encourage people getting together and having important conversations about the things they want to change in their lives. As the leader, you can support while flexing your creative muscles.
- ❑ **Host a Workshop.** If you’re active at your church or similar community center, offer to lead a group on a topic that’s interesting to your niche. As part of your introduction, explain that you are also a coach in case anyone in attendance would like to spend an hour with you outside the workshop.
- ❑ **Partner Up.** Who do you know that you could work with? Perhaps a friend has access to a beautiful space for a retreat. Or perhaps you know someone who raises or rescues horses. Think of the people in your life that could offer unique experiences as part of a combined effort.
- ❑ **Brainstorm More Ideas.** Perhaps none of these ideas are resonating with you. So consider the underlying directionality rather than the idea itself. How might you come up with your own creative solution to meeting with people especially in unique and creative ways?
- ❑ **Charity Raise.** For several years, I have raised money for Kids Chance Kentucky by offering a 90 minute coaching session that is auctioned off on the Charitybuzz platform. Doing well by doing good, I am introduced to prospective clients while raising money for a non-profit organization.
- ❑ **Chamber of Commerce.** By becoming a member of your local chamber of commerce, you are regularly networking with local business owners once or twice a month. As you grow your business, you can consider higher-profile networking groups like Vistage, YPO, EO or similar.
- ❑ **Commute or Sports Events.** If you take public transportation or attend sporting events, bring your business cards with your QR code and be ready to connect with new commuters and fellow fans.
- ❑ **What Haven’t We Covered?** None of this was intended to be definitive. Remember, all the answers you seek are already inside of you as part of your inner wisdom. What does your heart and gut tell you about your best avenue to generate appointments on your calendar? Go with that!

Tracking Your Progress



Guide: Review the Appointment Generation Guide & H.O.W. to Generate Appointments.

Action: Invest a **minimum of 15 minutes** to a max of 2 hours to generate appointments.

Track: WHAT you do is less important than your consistency of outreach efforts. Tracking your progress helps identify patterns where streaks are broken and the importance to restarting.

“YES” (✓) or “NO” (✗)

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Week 1							
Week 2							
Week 3							
Week 4							
Week 5							
Week 6							
Week 7							
Week 8							
Week 9							
Week 10							
Week 11							
Week 12							

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Week 14							
Week 15							
Week 16							
Week 17							
Week 18							
Week 19							
Week 20							
Week 21							
Week 22							
Week 23							
Week 24							

Celebrating Appointments Generated



10 Appointments = 1 Client

Remember, it takes about 10 appointments on our calendars to generate a single client. Get excited about each and every appointment secured. Celebrate it like the trajectory change being worked towards. Each step takes us closer to our financial freedom! Keep track by simply putting a number on any day a single appointment was generated on the calendar. Success begets even more success. This creates a vortex of momentum towards the outcome.

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Week 23							
Week 24							

Tracking & Celebrating “No for Nows”



10 “No for Nows” = 1 Client

So, if it takes about 10 appointments on our calendars to generate a single client. That means our ability to **NOT TAKE REJECTION PERSONALLY** is a keystone habit we want to develop. Here we track our 9 “No for Nows” and get pumped up by the closer we’re coming to our next client. Sometimes it takes more than 10 and sometimes less. Our focus is to celebrate each and every “No for Now” honoring the deep work being done (i.e. not taking anything personally).

Instructions

Check off each “No for Now” you receive and celebrate like you scored the game winning point in your favorite sport. Keep going. Don’t stop. If you receive 10 or more “No for Nows” then go to the next line. You’re filling in the “Nos” you need for your next client(s).

*When you get your first “HELL YES!”, circle the **1** and take note exactly how many “Nos” to get to this first client. Keep repeating this process until you have your next **10** clients. See how many actual “No for Nows” you received. Why? Because some of those former “No for Nows” change their mind and screw up all your plans. Now instead of 9 “Nos” you only got 3 and that earlier “more than 10 nos” suddenly gets averaged down to even less than 9 on average. Oh well. What are you going to do?*

No	No	No	No	No	No	No	No	No	YES	Nos?
									1	
									2	
									3	
									4	
									5	
									6	
									7	
									8	
									9	
									10	

Abundance Circle Best Practices



Abundance Circles are designed to support your way of financial freedom; specifically your “ways of being” as you build and grow your coaching business. They are meant to be a dynamic and supportive space. YOU are the key to making it a powerful experience for yourself and others. Each member brings a coaching background, contributes to the collective learning experience, and holds accountability for self and each other's experience. “If it’s to BE, it’s up to ME.” Be the support you wish to have. Let it be so.

*Your agreements and choice of interaction model depend on your individual and collective goals, experiences, and challenges. Remember, our obstacles show us the way and managing challenges together is part of the learning process. Goal of Tao Cha Ching: **Financial Freedom for EVERY Coach.***

Some group models to consider:

- ❑ **Coaching Rotational**
Coaches rotate to play the roles of coach, coachee, and observer/recorder in each session. This approach provides diverse learning experiences; everyone gets to coach, observe, and be coached. The timekeeper role is crucial here so that everyone gets a turn in each role.
- ❑ **Co-Coaching**
Two coaches collaborate to coach the third member. Roles rotate in subsequent sessions. This approach offers a wider range of insights and perspectives; everyone has the opportunity to coach and be coached. Person being coached can also request mentoring when flummoxed.
- ❑ **Appointment Generation Plan of Action**
Bring your generation plan to the group and share what you wrote down. What approach did you choose to leverage for this week? How will this help you generate more appointments next week?
- ❑ **Empathy, Compassion & BOLD Action**
Hit a difficult or tender part of the program? Share vulnerably, receive support from your peers AND explore the lessons being learned and experienced in real-time. Better or Bitter? Am I “Accepting What Is?” Receive the empathy you deserve and use it to empower & fuel your growth.
- ❑ **Improv “Yes.. And...” Solutions-Focused**
The group focuses on brainstorming solutions to a coach's challenge without judgment, encouraging proactive thinking. This approach fosters idea generation; helps apply solutions effectively in coaching practice and create a *plan of action* for the week.
- ❑ **Role Plays & Do-Overs**
Use this time to practice enrollment of your niche. Get feedback on precisely where a prospective client gets confused and unsure how to continue. Or share a part of a discovery session where things didn’t go as expected and attempt to replicate the situation in a “do-over” scenario.
- ❑ **Get UNstuck: Leverage HOW and WIN**
Coach one another using the HOW (Honest, Open, Willing) and WIN (What’s Important Now) frameworks discussed. Obstacles are presented with their built-in solutions encased inside them.

Be Mindful & Considerate of ALL

For best results, demonstrate your servant leadership by giving of yourself to each of the members in your group. You are powerful beyond measure. When you share deeply of yourself, observe the resulting magic.

How Much Should I Charge?



Congratulations! Today we answer this important question so that you can forever be free from wondering what the answer should be. At the end of this worksheet, you'll be able to compare what you currently charge (today) with what you need to receive in order to build the coaching business you deserve.

Step 1: Decide your desired annual coaching revenue (i.e. \$120,000)

Step 2: Decide the total number of 1:1 & group clients you wish to coach (i.e. 20)

Step 3: Divide your total annual revenue (Step 1) by total number of clients (Step 2) to arrive at your coaching engagement number (i.e. $\$120k / 20 = \$6,000$)

Step 4: Decide the term length for your coaching engagement (i.e. 6 months)

Step 5: Divide your coaching engagement number (Step 3) by term length (Step 4) to arrive at your monthly amount (i.e. $\$6,000 / 6 = \$1,000$)

Step 6: Decide your total number of coaching sessions per month (i.e. twice a month)

Step 7: Divide your monthly amount (Step 5) by number of session (Step 6) to arrive at your hourly rate (i.e. $\$1,000 / 2 = \500 per session)

Step 8: Compare your current rate per session with your new target rate (Step 7) to determine your percentage increase (i.e. $\$500 / \250 per session = Double)

Reflect on where my current rate is and how much I need to charge going forward:

How Much Should I Charge?



Okay, I know what I NEED to charge, but either this is too far outside my comfort zone or I know my niche can't afford what I need to be charging. Now what?

Rigorous honesty. Doesn't that feel great? Seriously, pause with me for a moment and allow this to settle in. Consider how long you've been conflicted here and now you have a clear piece of the puzzle and are exploring where to go from here. Beautiful. Seriously! If you're not celebrating these small moments, you're missing the point of Tao Cha Ching. THE WAY of financial freedom begins inside each of us and connects to our deepest wisdom.

With that framing in mind, you have options, don't you? At some level, you already know what I'm going to say, don't you? Trust your gut. Here are five answers to help you help yourself.

1. **Change your Rate** – Feel the fear and do it anyway. Turns out it takes the same number of “No for Nows” at your old rate than it will take at your new rate. The difference is, you can create financial freedom with fewer clients.
2. **Change your Niche** – If they truly CAN NOT invest what you need to charge, then consider focusing on a different group of people who can AND taking on your current niche at a reduced or even pro bono basis. It's up to you.
3. **Change your Irresistible Offer** – Is it that your niche can't invest or won't? If they can, but choose not to, then it's about your offer not being all that irresistible. The money they invest must be a small fraction of the value they receive and the outcome they achieve when working with you as their coach.
4. **Change your Focus** – What you focus on you feel. When you focus on your scarcity, it grows. When you focus on abundance, it grows. Which do you choose to feed with your energy? Change your focus and you change your trajectory.
5. **Change your Mind** – It's all in our heads. ALL OF IT. Money is a concept. Really. The value of money is solely based on what we collectively say it is. Inflation demonstrates that we're all willing to pay more (and sometimes substantially more) for the same items over time. When we change our thinking about money we see how silly it is to get all twisted up about a number. Our coaching rate is just an idea. The idea either resonates or it doesn't. The more value we create for others, the more that idea resonates. Do more for others than they could reasonably expect from us and watch how the numeric value put on your services grows.

Now it's your turn. What I'm noticing about my feelings about how much I should charge is ...

Breakthrough Lessons & Insights



Key Lessons I Wish To Keep & Pass On



Key Lessons I Wish To Keep & Pass On





Thank you!

**We deeply appreciate your participation
In the Tao Cha Ching Program**

