

The Lead Hunt Workbook

Exercises for Building a Clientele

Introduction

You've been following your business plan. You have a blog and newsletter, offer free webinars, and post on social media. Yet your business is flat. What is missing?

Most coaching business plans comprise activities that are actually tools for keeping an already-built market engaged until they are ready (if ever) to purchase your service or commodity. They miss the first and most essential step: describing, finding, and building a list of people who are potential clients/contracts or conduits to those clients/contracts.

The fact of the matter is that people who would be best served by coaching do not necessarily know what coaching is, let alone know where to go to find a coach who matches their particular issue or situation. Their path of least resistance is to their insurance company's list of mental health professionals for referrals. Businesses both small and large that would benefit from organizational and talent development do not necessarily know that coaches readily facilitate and support those activities.

Doing the leg work of finding your potential client is essential. The task of getting leads is defined as locating and connecting with your market so that it learns of your services. It is incumbent on us to incorporate building a universe of potential clients into our repertoire of skills. Part of our business development plan must include cultivating a large swathe of leads who direct us to the people who would be best served by our coaching specialty.

This self-guided workbook comprises a series of written exercises that will 1) help you identify your niche and your desired or ideal client, 2) provide delineated steps to identify and locate both leads and potential clients and 3) expand your networking opportunities. The lead is the starting point; the client is the ending point.

Table 1 illustrates the interactive, interconnectedness of using a network that ranges from personal friend to C-Suite Executives of organizations. The X's represent how the network can become a client or lead to a client.

Table 1. This table is not all inclusive. The table is for illustrative purposes only.						
	NETWORK**					
ROLE	Friend	Member of the target community	Human Resources Individual	Corporation CEO/COO	Business Owner	Association Executive
Lead For Individual One-on-one coaching	X ¹	X			X	
Client (self) For individual One-on-one coaching		X		X	X	X
Coachee For Individual One-on-one coaching		X ²				
Lead (for) coaching within organizations			X			X
Client (for) coaching within organizations			X	X	X	X
Coachee (for) coaching within organizations			X	X	X	X
1. A friend can be a lead but typically is not a client 2. Typically, a minor is a coachee and the parent is the client.						

Definitions**

A client is the customer who receives your invoice and pays for your services. Your coachee is the person you coach. Your clients may be individuals for one-to-one coaching/mentoring or may be organizations enlisting your services for coaching, consulting, and/or mentoring individual employees and groups. In one-to-one coaching (sometimes referred to as one-on-one coaching) the client and the coachee are generally the same person.

A lead is a contact who sets you on a path of finding a prospective client, whether that client is an individual or an organization. That path may be short-- your lead may turn out to be a potential client. The path might be a direct line-- your lead may be the conduit to someone who is specifically and currently looking to hire someone exactly like you. Or the path may be circuitous-- with the lead simply giving you a valuable starting point in building a road map to a client.

When referring to organizations, I include small and large businesses, either privately or publically owned; institutions such as hospitals, schools, and universities; associations, civic entities and other not-for-profit groups; and ad hoc groups such as councils and commissions. Note that government agencies require that coaches be International Coach Federation (ICF) certified.

When referring to the key decision-makers within organizations, I am pointing to the people with the ability to either make a hire (become the customer) or recommend a hire. Most often these decision-makers are human resource personnel, Principals, Chief Executive Officers (CEO), Executive Directors (ED), Chief Operations Officers (COO), or the business owner.

The Lead Hunt

The lead hunt is based on a fundamental premise that you have a fine-tuned specialty or niche service and can envision your target client population. The value of knowing your niche cannot be understated. For example, a coach who says, “I help raise the confidence level of people who breathe so they can lead fulfilling active lives” has a target population of essentially everyone on the planet. In contrast, a coach who says, “I help raise the confidence of people who have breathing issues such as asthma so they can lead fulfilling, active lives” has a clearly delineated customer for tailored coaching expertise.

Similarly, an executive coach/consulting coach whose practice “provides 360 degree and other assessments and brings forth the best technical and communication skills of each employee” has a target population of every business on any given street in the country. However, an executive coach/consultant whose niche is “serving mid-range size organizations who rely on the team-

building skills of its highly valued software engineers” will have an easier time identifying potential clients and thus a more successful rate of return on networking.

This lead hunt workbook is crafted so that you spend time thinking fully and deeply about the challenges and daily life of your prospective client. In doing so, you identify a rich and diverse landscape with many different points of entry. For example by imagining where your client or decision-maker might go to release stress, you have opened access to a desk or bulletin board to post your business card. A casual conversation at that facility or program has a greater probability of piquing the interest of another attendee. By speculating on the professional materials they read you may have uncovered an untapped resource for placing a unique advertisement. By intuiting which organizations your audience might belong to, you have found entre to local networking opportunities.

The workbook comprises a series of exercises that require imagination, thought, and research. This is especially true of the section in building your elevator speech, which helps to clarify your skills niche and niche clientele. (An elevator speech is a thirty second or less explanation of what you do, for whom you do it, and the benefits of your work. Using just a few sentences, it is intended to pique the interest of the listener while establishing your credibility and demonstrating how you stand apart from others.)

Not all roads lead to success. If you find you are struggling with some of these exercises, enlist the help of another coach. Often the synergy of a brainstorming session with coaching colleagues is the perfect solution to a stalled search. Or, if motivation, ambivalence and blocked vision (perhaps an inner critic who is talking too loudly) stand between you and a productive lead-hunt, it is time to enlist the paid services of a professional coach. Helping people feel confident, balanced, and in touch with inner strengths is what coaches do.

A Caveat

This lead hunt focuses on the architecture of building leads, the first step in building your practice. *Engaging the potential client*, i.e., crafting conversations, including your introduction, informational interview, proposal for services etc. and building relationships, -- is outside the purview of this workbook.

Exercise 1: How Ready Am I?

The very first step before undertaking any business development action is to look at your resiliency. If your personal energy level is low and you commit to 100 networking events, you are automatically setting yourself up for disappointment and frustration. The process of seeking out people can be enervating. Knowing your capacity for networking and interaction is an important parameter as you establish your to-do list.

In the following two exercises you can measure your energy, resilience and commitment to undertaking the task of actively building a clientele. The answers are divided into three qualitative responses: “Yes, absolutely!”, “On Occasion”, and “No, it just isn’t me”. If the majority of your answers are “Yes, Absolutely!” you are mentally prepared to spend time in the hunt. You are aware of the risks (dead-ends, rejection, missteps) and are willing to forge ahead, regardless.

If the majority of your answers are “On Occasion” you have awareness, energy, and ambivalence. In true coaching fashion, it would be a valuable homework assignment to look at those areas that are holding you back while you undertake the hunt in smaller chunks. Getting a few initial successes under your belt will aid in building up resilience and resisting inertia. If the majority of your answers are “No, It Just Isn’t Me” it is time to re-evaluate what is holding you back from meeting people and resisting taking chances. Is there a self- saboteur lurking?

Exercise #1A: Before the Hunt: How Resilient, Open-minded, and Determined am I?

Answer each of the following questions by placing a check in the appropriate column: Yes, absolutely! On occasion, No, it just isn't me.

When you are finished, tally up your responses. If the majority of your responses are 'yes', you are primed for the hunt. If your majority response is 'on occasion,' you may have some ambivalence (or that inner critic holding you back). Consider finding a coach to help get you on track. If your responses are a resounding no, you can pursue some of the more passive modes of getting leads while working through those areas of discomfort and challenge.

Question	Yes, Absolutely!	On Occasion	No, It Just Isn't Me
I am comfortable contacting people I do not know			
I have patience: I don't worry if I don't hear back right away from someone			
I am willing to take risks, even if it involves a financial commitment			
I am 100% committed to finding new clients even if it makes me uncomfortable			
I set aside time daily to build up leads			
I do not see rejection as a personal affront or a drain of my energy and hope			
I am willing to step outside of my comfort zone			
I am willing to ask people for help and make requests of people I do not know			
I'm able to quickly recover [emotionally] from losses and setbacks			
I am enthusiastic and positive about looking for clients			
I keep my goal clearly in mind where there is something that I want			
I am diligent in getting back to people and following through on requests			
I am willing to try new things—like attend a meeting of people I do not know			
I find networking and marketing challenging rather than a chore			
I have a strong knowledge of my niche and target audience (client)			
I am willing to hire or barter to have my own coach if necessary			
TOTAL			

Exercise #1B: Before the Hunt: How Resilient, Open-Minded, and Determined Am I?

If the majority of your answers are “Yes, Absolutely!” you are mentally prepared to spend time in the hunt. Two areas I can work on right now are:

- 1.
- 2.

If the majority of your answers are “On Occasion” you have awareness, energy, and ambivalence. Two areas of confidence that I can put to use right now are:

- 1)
- 2)

Two areas of ambivalence I can start working on right now:

- 1)
- 2)

If the majority of your answers are “No, It Just Isn’t Me” it is time to re-evaluate what is holding you back from meeting people, taking chances, and finding your voice.

- 1) This is how I can negotiate with my inner critic:
- 2) Three areas I can address with a timeline for starting to address them:
 - a)
 - b)
 - c)

Exercise 2: Starting the Lead Hunt by Putting an Elevator Speech To Work

The aware coach has a clear understanding and vision of their niche, i.e., their specific expertise and the target client population (community, organization, or individual) who benefits from the expertise. The more specific we are in characterizing the people we choose to help and the more confident and competent we are in our coaching skill set, the easier it is to define our target clientele. For the duration of the lead hunt, your target population and your area of expertise or specialty are fixed, i.e., *they are the basis for your lead hunt.*

Your area of expertise (the type of coaching/mentoring/consulting that you do) and the people that you chose to serve (your target population) are determined by your experience in different work domains, special interests that you have been drawn to, and the people, situations, values or interests that resonate with you. A key tool to find and articulate your niche is through the development of an “elevator speech.”

An elevator speech is a crisp, succinct narrative of what you uniquely offer and for whom you make this offer. A typical elevator speech (See Exercise #2) has:

- 1) An action statement (examples: guide, teach, provide, present, aid, assist, support, give, evaluate, assess)
- 2) A client definition (examples: young adults, chronic pain sufferers, people in transition, business owners, middle managers who want their problems/issues or situations resolved)
- 3) A desired outcome (examples: increase profits, find needed relief, become fit and healthy, graduate from school, develop greater confidence, gain career direction)
- 4) A solution (examples: discover a process, create effective solutions, discover the best course of action, place self first)
- 5) A benefit (examples: experience a pain free life, build the business of one’s dreams, find work/life balance)
- 6) And additional information (your purpose, your credentials, what makes you special and stand apart)

FILL IN YOUR ELEVATOR SPEECH

Exercise #2: My elevator speech

I _____

action verbs

definition of people and/or organizations you serve

definition of people and/or organizations you serve

to _____

solution

solution

so that they _____

benefit

I _____

additional information

additional information

Exercise 3: Identifying Leads from My Target Population's Potential Challenges and Issues

A benefit of having a niche practice is that while the definition of the target population is fixed, the descriptors of your target clients and the issues that they face are quite expansive. When fully and broadly articulated, the descriptors can encapsulate a diverse demographic. The descriptors are used to determine the places, organizations, meetings, and cyber-spaces where clients live, work, play, face their personal challenges and seek help for their challenges. *You need to know where to find your clients in order to connect with them.*

The next exercise is to paint a picture of the challenges/issues that your target client may face and marry it to the places, organizations, people, or resources that clients might use to seek satisfaction or resolution of these issues. These challenges may not be the precipitators for seeking coaching. For example, a person in transition from married-to-divorced may seek coaching to get back a sense of balance and confidence although s(he) has related challenges such as childcare and dating. Looking at the ancillary issues is done to associate a full menu of issues with outlets: what/where/who might the client be reading, meeting, thinking, networking and associating with for resolution or satisfaction.

For example, if your defined clients are “empty nesters or soon to be empty nesters who want to develop their passion and transition into their new status,” their other issues might include: caring for an elderly parent or grandchildren; facing new physical disabilities or health issues; recent widowhood; a desire to go back to school; a desire for travel; a feeling of isolation and wanting to re-connect; and/or a wish to relocate.

If you are a leadership coach and consultant whose clients are “business leaders who lack the skills and expertise to get the best performance from their employees” challenges might include: not knowing where to go for help outside of their professional circles; emotional issues of unmanaged anger or stress; feelings of professional isolation. For executive coaches who work with organizations, finding the sources where hiring decision-makers may turn for help will expand your networking opportunities.

Looking at the environment(s) in which your target population lives offers a rich palette of contacts—and although the contacts may not be direct links to a paying client, they nevertheless

support getting your name into the marketplace. In these environments, people often know of someone who could use your services. There may be opportunities to get subscribed to newsletters, a platform you can use to reach new clients or to build your email list.

The following is an example of ways to build contacts by brainstorming the challenges and issues that your target population might face by using the elevator speech:

EXAMPLE 1		
Exercise #3: Identifying leads from my client’s potential challenges and issues		
From the elevator speech: I work with empty nesters or soon to be empty nesters who want to develop their passions and transition into their new status.		
<u>Challenge</u>	<u>Outlet</u>	<u>Contact Information (fill in address, phone, key contact)</u>
Caring for an elderly parent or supporting grown children	Hospital support groups, eldercare centers	
Caring for grandchildren	Childcare Centers (bulletin boards) Grandfamilies of America, Familytree	
New [problem] health issues	Community centers/senior center	
Desire to get in shape	Health clubs/YMCA, senior Center	
Recent widowhood	financial planners (local), church organizations; widower meet-up (local)	
Desire to reconnect/build friendships	AARP, community colleges, senior meetups, library	

Exercise 4: Building Leads from Where a Potential Client Lives, Works and Plays

The next step is to think about the life of the client. Where does your client/coachee, the one-on-one individual or the organization’s hiring decision-maker, live, work, and play? Are sessions within driving distance for face-to-face meetings, or is the client located where phone, Skype, and email are necessary? In the following example, a coach who works with teens and young adults in face to face settings identifies where the potential client can be found. Here, the coach has defined their desired driving radius for face to face coaching.

EXAMPLE 1: Lindsey. Individual one to one coach.			
Exercise #4: Where my client population can be found			
I work with teens and young adults, helping them with career and school success. The student is the target, although it is the parent who solicits and pays for the service. I work face to face.			
Question	General Answer	List Specifics	Contact Information
Where do they live?	2 hour driving radius from my home (85 mile radius) in Baltimore, Maryland.		
Where do the students work?	supermarkets, book stores, ice cream parlors, restaurants, hardware stores.		
Where do the students play?	Scouts, sports activities, YMCA and community centers.		
Where do they worship?	Church, temple, mosques		
Where do they go to study?	High schools, private schools, home schooled.		
What organizations might they belong to?	Students: School clubs. Parents: Board of Education PTA, homeowners associations and work-affiliated organizations.		
What online groups might they belong to?	Students:Pinterest; snapchat; twitter; instagram Parents: Facebook parenting groups; twitter		

Similarly, an executive coach can evaluate the daily life of an organization’s hiring decision-maker. In the following example, an executive coach works with women-owned businesses.

EXAMPLE 2. Jules. Contractual Coach to Businesses			
Exercise #4: Where my client population can be found			
I facilitate employee self-awareness and team-building to optimize performance in women-owned businesses.			
Question	General Answer	List Specifics	Contact Information
Where do they live?	Ideally, I want to coach small and medium sized businesses in the Metro DC area; decision-makers live within commuting distance		
Where do they work?	Women-owned businesses are throughout the district and can be identified through directories.		
Where do they play?	Health club facilities, meet ups for women entrepreneurs.		
Where do those people worship?	Church, temple, mosques		
Where do they study?	Graduate programs for leaders, community colleges, other evening graduate programs		
What organizations might they belong to?	DC Women’s business center association; national business women’s council; The Women’s Center; chambers of commerce; professional associations		
What online groups might they belong to?	Linkedin: Women’s Network of Entrepreneurs Facebook: Women Entrepreneurs		

Exercise #4: Where my client population can be found

from my elevator speech:

<u>Question</u>	<u>General Answer</u>	<u>List Specifics</u>	<u>Contact Information</u>
Where do they live?			
Where do they work?			
Where do those people play?			
Where do they worship?			
Where do they go to study?			
What organizations might they belong to?			
What online groups might they belong to?			

Exercise 5: Building Leads from Organizations Associated with the Issues my Target Population Faces

A key to hunting leads is identifying the organizations that have a vested interest in your target population and their issues. Affiliation with these organizations is paramount not only to finding clients: it will give you numerous opportunities to forge strategic alliances, become closer connected to communities of people who have personal and professional interest in your client population, and provide new networks that arise from expanding your circle of contacts.

EXAMPLE 1. Lindsey. Individual one to one coach.

Exercise #5a: Organizations that are concerned or affiliated with the same issues facing my target population

I work with teens and young adults helping them with career and school success.

Organization	Location	Contact Information
Advocates for Children and Youth (ACY)		
Eastern Shore of Maryland Education Consortium		
Fund For Educational Excellence		
Maryland Business Roundtable for Education (MBRT)		
Maryland Middle School Association (MMSA)		
Urban Leadership Institute		
Maryland Educators of Gifted Students (MEGS)		
Maryland Career Development Association (MCDA)		

Many coaches utilize their skills and talents by working with organizations. Finding clients is also done through researching and data-mining to find the groups that are affiliated with the coach’s target population. They are interested in what concerns their constituents: enhanced communications, efficiency, greater productivity,; strong leadership, and team-effectiveness—a perfect match for the executive coach. Two examples of affiliated groups are professional associations and chambers of commerce.

executive/organization coaching and consulting		
<p>Exercise #5b: Organizations that are concerned or affiliated with the same issues facing my target population</p> <p>from my elevator speech:</p>		
Organization	Location	Contact Information
Chambers of Commerce within your target population region		
Professional Societies and business associations-- local chapters (area of expertise relevant to the business)		
American Society of Association Executives		

Human Resources Associations		
Local Networking Groups		
Government Agencies		
(fill in)		
(fill in)		

Exercise #6: The online places my target client visits

In the next exercise, build your online presence by examining where your target population likely visits.

Exercise #6: Describing communal spaces in the virtual world where my client might visit (including those from exercise #4)		
Location	Name	Link/Location
Facebook Page for your coaching practice		
Personal Facebook Page		
LinkedIn		
Blogs		
Webinars		
Tumblr		
Pinterest		
Reddit		
Other		

Putting the Lists to Work.

Exercises 1A and 1B give you an indication of your readiness to pursue hunting leads and making contact with potential clients. Regardless of the extent to which you are ready to build an audience, you can start your lead hunt slowly (passively) or with full intention (aggressively).

The passive lead hunt is analogous to sitting in a deer stand and waiting until a deer comes along. Thought goes into strategically placing the stand based on information about the deer's habits, increasing the odds that a deer will be within eyesight of the stand. The previous exercises in this workbook provide you with the answer to "Where are my client's trails so that I know where to build my stand?" Those places might provide a communal space for you to post information about your services. Newsletters, local newspapers, and flyers that are placed and offered free provide low cost advertizing, in addition to solicitation for articles and stories that might enhance your visibility.

Casual conversations in these places might actually turn up the name of a person or organization who is seeking your services or who knows of someone who could use your services. Analyze your lists compiled from exercises 3-6 to find real world (and virtual world) places where there are communal bulletin boards, spaces for meetings, or business card exchanges posing opportunities for you to share information about who you are and what you do.

You can also be more assertive in the use of your lists. Seeking out the client requires using database mining and sleuthing skills—stretching, searching and speculating on who might need you. The goal of identifying all the descriptors of your potential clients in the previous exercises is to enable you to build a list a substantial list of individuals or organizations that could benefit from the services that you provide—or who have access to and/or information about the communities of people who would benefit from your expertise.

The list of individuals and organizations become your first points of contact for making connections and establishing relationships to build your market. By pursuing these contacts you will increase the probability of connecting with your market and building your practice.

Next Steps

This workbook focused on building your contact base so that you can identify and create a market for your unique and valued services. This is a critical first step in building your practice. The skills you hone in crafting your lead hunt will support your work for years to come.

Having contacts is only the beginning. It is a necessary and critical first step. What follows is developing the strategy and skill sets to create conversations and build relationships with potential clients. This comprises engaging your broad audience and building a credible presence where you are viewed as an expert.

There is no magic to building strategy and skills. It simply requires contemplation, experimentation, and education. And sometimes the help of a coach.