

# Sacred Depths

Transformational Practitioner Certification

## Roadmap to Get Started with Clients

You have been learning the skills to work with clients, now what?

There are many ways to set yourself up for working with clients, and this is a simplified version to help you get started. If you have questions, please join us at the Community Q&A calls!

**To get started, you'll want to make some decisions about how you want to structure your offerings:**

- Choose your program or package – the number of sessions and length of time you'd like to work with your clients. For newer coaches, it can be helpful to start with 3-month packages – 2x a month for 6 total sessions. Or 6-month packages - 2x a month for 12 total sessions. It can sometimes be helpful to think about what the ideal program would be for you because your clients are a version of you.
- Choose pricing that feels right for you and for your clients. Remember the stretch, risk, or die rule. Depending on your specific work, weekly sessions might serve your clients, so there's no hard/fast rule here.
- Choose how you'll receive payment and whether you'll have a pay-in-full option and/or payment plans. Set reminders for yourself if doing manual payments on a payment plan. There are several automated systems to collect payments. The main idea here is to do it in the simplest way to start, and then as you grow, you can add in automation, especially if tech doesn't come easily to you.
- Create your program guide: Identify your *Brilliance Based System™*, or your unique brilliance that allows your client to go from where they are now to where they want to be. This can be different modalities you utilize, or it can be different areas of life that your clients need support around.

Once you've clarified your *Brilliance Based System (or BBS)*, you will use it on your sales page, in your enrollment conversations, and in your marketing. For Sacred Depths, the BBC is [the Syllabus](#), and each of the modules listed there. For a coaching program, the BBC might be something like [this example](#). If you are a practitioner that incorporates different modalities like Reiki, acupuncture, etc, you may want to include that. [Here is a recording](#) that Joanna made that describes the BBS in more detail.

**Outreach: Once you've decided on how you want to work with people, you'll want to have a plan for how you'll identify those ideal clients and invite them to work with you!**

- Identify your Sacred Message: In this powerful messaging lab, you will unearth and hone your unique and sacred marketing message. Messaging is KEY when it comes to powerful marketing, and being able to magnetize your ideal clients and build community. We'll go deep together for you to articulate your brilliance and bigger mission on the planet.
  - [Recording pt 1](#)
  - [Recording pt 2](#)
  - Resource Sheet: [Marketing Message Examples and Journaling Qs](#)
- Listen to Authentic Enrollment Conversations recording: In this 5-hour deep dive, I'll walk you through my easy-to-execute signature system for gracefully introducing prospects to your work and for ease-fully generating ideal referrals, new contacts, and new opportunities. (Watch out, world! Here YOU come!)
  - [Recording](#)
  - Worksheet: [Scheduling and Confirmation templates](#)
  - Worksheet: [Rescheduling templates](#)
  - Worksheet: [Enrollment script](#)
  - Worksheet: [Template Sample Program Guide](#)
- Invite people to work with you. Schedule outreach each week. Think of 1-3 people a week you could reach out to. And be sure to follow up. Templates can be found in the Bonus Call mentioned below.

**Additional outreach/marketing:**

There are many ways to connect with people who might be interested in working with you. One simple way would be to offer a signature talk or preview presentation to expose your brilliance to people within and outside of your community. From there, you would invite people into calls with you for private work. Training links are below.

- **How to Bring in more 1 to 1 clients and group participants:** In-person workshops, circles, and retreats are some of my favorite things, and they work really well as marketing avenues for 1:1 clients. Over the course of these 3 recordings, you will hear about some of my most potent techniques for filling live events, as well as using them to attract private clients.
  - [Recording pt 1](#)
  - [Recording pt 2](#)
  - [Recording pt 3](#)
  - Resource Sheet: [Email templates](#)
- **Crafting Your Preview Presentations Training:** I will lead you step by step through my secret formula for creating presentations that will knock the socks off of your audiences and have them running to sign up with you.
  - [Recording](#)

**Container: You've all learned about the importance of setting and maintaining a solid container. Here are some basic ideas about how to structure your packages with this in mind.**

- Ask your clients to fill out a Welcome Questionnaire that is to be emailed to you 24-48 hours prior to the first call. This document will help set the container, as well as expectations and agreements, about what you'll work on together. – [\(sample\)](#)
- Ask your clients to send you a Prep form before each call. It should be emailed to you before each session, to help you and your client be prepared for the call – [\(sample\)](#)
- Initial appointment – You can set a longer time for this first appointment to go over logistics and expectations, as well as setting intentions for the whole container.
- Maintaining the container: You can decide how much checking in or communication happens between sessions. If your client has action steps they commit to, you may offer check-ins for accountability.

- Next steps process – usually adding an additional session between the second to last and last session. A chance to celebrate and acknowledge the work that’s been done together, then talk about where they want to go from here and what support they might need. If appropriate, invite them into another offering with you.
- Final session – if not continuing, save time at the end to acknowledge the time together.

We hope you find this simple guide helpful in visualizing your practice coming together! Remember that these are just some of the ways you may decide to get started, among the many different options you can choose to set up your client work. We are excited to support you in working with clients using your Sacred Depths techniques and tools!