



PROFESSIONAL CHRISTIAN COACHING TODAY

Chris McCluskey & Kim Avery

*The podcast dedicated to Raising the Standard of Coaching...
and Changing the World*

Episode 049

Kim Avery on 10 Steps to a Business Plan that Succeeds

CHRIS: A business plan that succeeds. We have a really special treat for you today in that I am going to be serving as kind of an interviewer for my co-host here, Kim Avery. We've not done this since way back when I interviewed her about her personal story, her transition into coaching and all. Of course she did the same with me early on but today, I'm going to be interviewing Kim about marketing and specifically a marketing business plan. It's a 10-step plan that she's going to walk us through and she has proven not only in her own practice but in many, many private client practices now. In fact, she runs a program for people on marketing and she has done this thing for years. It's a proven success model for growing your business by following very clear steps and you're going to get to hear all of that outlined today. I'm not sure, Kim, that you need much of an introduction to our audience here, but you're going to have to let me indulge myself a little bit and just brag on you, okay?

KIM: Uh-oh.

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CHRIS: I truly am privileged to have Kim as my co-host here because quite frankly, there is no other immediately identifiable person in the entire professional Christian coaching market who is as branded, as well known and connected with the specific aspect of marketing as Kim is. That branding is one that she has earned because it's the fruit of very consistent efforts over many years to build a brand for herself and to build awareness of just Christian coaching in general through many different means and so we're going to get to partake in that. Since you do know her here from our podcast, let me just be sure that if you haven't already visited her website, you're aware she lives out on the web as well at KimAveryCoaching.com. At the end of today's broadcast, I'm going to promote some of the other services that she has available that you very well may want to avail yourself off.

There we go, Kim. I've bragged you up and I guess I'll curb myself but walk us through first, I think, just an introduction to kind of the importance of a disciplined approach to marketing and then maybe feed us this 10-step process you have.

KIM: Okay and thank you for that introduction, Chris, very generous and I appreciate it. As you and I often say in our mastermind group, you need to plan the work and then work the plan. Planning is an important tool. We do that for vacations, we do that for our budget yet it's amazing to me how easy it is for people to go into the business, do a lot of the right things but not really have a strategic plan to make sure it all plays together and works. We can, of course, go into all of those different factors that go into something like that today but I thought we would take a rather coach approach to the plan. I've gathered 10 questions that our listeners can ask themselves, coach themselves, as it were, as they think about how to set up a business plan they can start today.

As with almost everything I do, I like to base it on sound research whenever possible. Let me kick off with this study from Dr. Gail Matthews. She lives out at Dominican's Department of Psychology and it was probably about five or 10 years ago now, she did a fascinating study on goal setting. I think this is important not just for ourselves but also for our clients as we think about working with them.

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She split everybody into five different groups and in ascending order of commitment, she helped them go through setting and trying to keep some goals. Group one just thought about their goals. Group two actually wrote them down. Group three wrote commitments for each goal. Group four shared their commitment with a friend and group five participated in weekly accountability.

The study was a month long. Four weeks later, the results were in and group one, 43% of them had achieved their goals, which I think is actually a surprisingly nice number. Group four, 62% and group five 76%. The difference between thinking about your goals in group one, writing them down, committing, and sending in weekly progress reports and having accountability is really marked. She said this conclusion. In her words, “My study provides empirical evidence for the effectiveness of three coaching tools – accountability, commitment, and writing down your goals.” That’s what we’d like to think through today, 10 questions you can ask yourself, write down the answers to them, plan the work, and then work the plan. Just in case people are driving today, Chris, let’s go ahead and put these 10 questions in the show notes at the end of the episode.

CHRIS: Absolutely. This will be available for our to download from our show notes and if you are at a place where you can grab a notepad and jot some things down, you might find that you want to that you listen more actively here now, and that you already identify some specific goals, but certainly, all of this will be available in the show notes afterwards on our website.

KIM: All right. Let’s start with question #1 which is this, what is your five-year business goal? In measurable objective amounts, think in terms of money, what income do you want to earn, the number of clients you want to have or the number of followers, the number of speaking engagements, whatever is important to you about it. It’s important just like we do with our clients to start with a vision. Now, a vision in this case is not a to do list or the strategic plan, but it is detailed and sensory. As we saw in the study, it’s written down and referenced frequently.

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While we haven't done an episode on visioning yet and I hope we will at some point, Chris, you and I know some of the benefits of visioning with our clients.

CHRIS: Absolutely. In fact, as soon as I saw this one as your first point here, I reflected back on my launch into this field after we moved to the farm here. Some of our listeners are familiar with what a struggle I had getting things going and I pulled out a little sticky note at the end of 1999 because it had been such a brutal year of transition. I had not come close to the goals that I had envisioned originally and crunched out. I stuck the sticky note on the bulletin board above my computer so that I saw it every single day. On January 1st and the sticky note simply said, "Today is June 30th and I have 25 clients grossing \$4,000 a month or more." That's what I looked at every day and that wasn't just like a pie in the sky kind of thing. That was a very specific goal, number of clients, target date, total gross income from those clients whether serving them individually, three times a month, one time a month, whatever the mix was and/or in groups. There it is and so all of my efforts then from January to that point were geared around hitting each of those three markers.

KIM: I love that. It gave you such incredible focus when you were thinking about how to spend your time. It was very proactive instead of reactive, and it made some risk worth taking. Knowing that you wanted to hit that on June 30th made it worthwhile to do some things that may have been hard for you to do along the way.

CHRIS: It did very definitely. Let me even underscore something else that I think will be important for our listeners. All of my efforts were geared around that marker in my calendar, midyear. That's exactly the midpoint of the year and that number of clients and that gross income. I didn't hit it. June 30th came and I did not hit my goal. I hit it August 1st. The month of July had to pass before I finally hit it. I believe that I would not have come nearly so close to hitting my goal had I not so clearly identified it. Although it took me until August before I hit the goal, by the time I wrapped up the year, all of those efforts that I had so intentionally lined out

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for myself resulted in a more than quadruple total gross income for that year than the previous one. It does underscore, “Hey, it’s okay in the end if you don’t exactly hit your score. Just know what you’re shooting for and know that you are going to get a whole lot closer because of that kind of focused intentional effort.”

KIM: Yeah, no doubt about it. Beautiful.

CHRIS: As they say, if you shoot for the moon, you might miss but at least you’ll wind up among the stars, right, or something like that.

KIM: I love that. All right. Okay, question #2, what would achieving that goal bring you? Think about this mainly from an emotional or relational point of view. You want to take that literal description “I want this number of clients or this amount of income” and tap into your emotional center.

A few years ago, neuroscientist Antonio Damasio made this amazing discovery. He studied people who had damage in one part of their brain and it was part the part of the brain where the emotions are generated and he found they seemed normal except they were not able to make decisions. They could describe what they wanted in logical terms, but they found it very difficult to make even simple decisions such as what to eat for dinner, should I have chicken or turkey? They had no rational way to decide and this, amongst other things has led neuroscientists to realize that emotion is the ultimate trigger for every single decision we make. When we work with our clients and we’re setting goals for ourselves, we definitely want to, as we vision the future, tap into the emotional realities that will be true for us when we step into that place that God is calling us.

From there, let’s go to question #3 you’re going to ask yourself. What are your specific business objectives for the next 90 days? Choose one to three. More and more productivity experts are advocating framing our planning in terms of what they call a 90-day year, taking each quarter as a distinct unit. Works well for several reasons. Just picture my gym anyway and yours as well on January 2nd. It’s full. There’s not even a parking space in the lot. Come March, I never have

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trouble finding a parking space or a machine in the gym. What's sad is people will generally not reboot their exercise intentions until the next January. There's just too long of a stretch between setting the goal and the realization of the goal.

When you use a 90-day year, as it were, when you set the goal and the intention at the beginning of the 90 days for you business building, you're motivated. You have energy, you're focused. You know exactly what you want to have done. Even if your energy lags in month two, by month three, it's peaking back up because you're seeing the end of the 90 days and, "Oh no, I wanted to hit that goal. I better refocus and reengage." So you're never more than 30, 60, 90 days from rebooting and getting to try all over again, so setting specific business objective in 90-day increments.

CHRIS: And this is right out of the business world. If we think about the large corporations and the reports that we see on the news or if you follow the stock market, we know that all businesses are going to see some degree of fluctuation week to week, even month to month, but what we really pay attention to in Corporate America and what the investors and the boards pay attention to is what are your last quarterlies looking like? What is the quarterly report for this year looking like? Things can vary wildly in terms of stock valuations each quarter if things are a very positive report or a very concerning report. It's an easy borrow for us but I'm not sure that we're used to thinking that way for ourselves.

We tend to think in a 365-day year and like you said, that's just a huge stretch of time, very rare that anybody can grab a passion especially a new passion, a new set of goals and just run in out for that long period of time and not have it really start to flag.

If you chunk down into, as you say, a 90-day year, every quarter that you are reassessing where am I? Where do I need to reboot? Do I need to modify the goals and start out again? You get that big

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kick, that fresh, “Okay, here we go again.” It’s just like January 1st all over again, only it’s actually April 1st or whichever new quarter is starting. I love it.

KIM: Right, who doesn’t love a fresh page to start on and it leads us to question #4 which is how will you celebrate achieving this goal? So keeping track of 90-day years means you get more times to celebrate. Wolfram Shultz who is a researcher at the University of Cambridge, he studies how the brain processes information and he says this, “Celebration and dopamine is a reward to our brains like treats are to animals.” Our brain loves it when we celebrate and that makes sense. God made us to want to repeat behaviors that make us feel good and reward us. Unfortunately as coaches and maybe as human beings, we tend to be not good at celebrating our achievements. It’s like, “Okay, that’s done but I want to do, but I want to do.” So our poor weary brain never gets the chance to say, “Yes, let’s do that again. That was really good.” It doesn’t have to be a big celebration. You don’t have to cruise around the world, but even just mentioning it to a friend and taking time to thank the Lord for what you’ve achieved in those 90 days is important to our long term business success.

CHRIS: It would be a completely different episode so I’ll not go off on this tangent; however, I will say that I think there is a unique quality here in much of Christendom that may make celebrations such as your discussing there a little bit more difficult for some of us to do than it might be for other people who are just in the world and maybe don’t have a faith world view. I don’t know why it should be because our Lord was very celebratory and God himself established in the Old Covenant very clear points of celebration. When in Jewish culture, they had something to celebrate like say a marriage, those people knew how to party. A wedding ceremony went on for a week. Hello? It’s about all week to do both of the wedding ceremony and the reception, right, for 3-4 hours.

KIM: Right.

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CHRIS: I'm not sure we know how to celebrate. Christmas day is what we do and many of us don't do much that's really structured and celebratory on Christmas day. They have Hanukkah for crying out loud. We've got several days in a row again of just celebration. That is giving thanks, soaking in the awareness of the goodness of God's provision, the richness of His blessing. That's what you're talking about here is that when we do achieve goals, when the things that we're desiring do begin to become a reality, we make the effort to say, "Yay! That's a really good thing. Let's go out for dinner, sweetheart" or "Hey kids, let's go out for ice cream tonight because mommy/daddy did such and such" to celebrate consciously, intentionally and how neat that the Lord even wired us for that dopamine hit that we get from it as well.

KIM: I agree and building a full and thriving coaching business is a long process. If people wait until their business is fully built and running before they celebrate, well, it's not going to be a very enjoyable process.

CHRIS: No.

KIM: Let's go to question #5 which again coaches will recognize and that's simply this, write down where you are now. It's good for us to understand where we're starting and all things relevant to building our businesses. How many clients do I have now? What's my current income? How much time do I have to devote to business building activities? What resources or connections are supporting me in the process? This frank evaluation will help us set those appropriate expectations and really give us clarity on what our next steps are as we continue to move forward with our 90-day plan.

CHRIS: All right Kim, let me jump in there because I know that you're going to take us into the next set of five points in this 10-point plan that you're laying out. Let's just review what you've already called us to here. You've asked five specific questions of everybody, 1) What are your five-year business goals? 2) What would achieving those bring to you?

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3) What are your specific business objectives, and you specifically said for the next 90 days? 4) How will you celebrate achieving those goals? 5) Where are you now? This sounds to me like we're taking a bit of a coach approach here. You're starting with, "We're going to close that gap." You're starting now with "Where are we at this point in the gap?" Let's step us into these next five steps.

KIM: All right, #6, for the next 90 days, here's the question, what are the monthly milestones you will meet? So even having a 90-day goal can be a little bit long sometimes. Let's set some mile markers along the way so you can track your process. A lot of marketing and business building because all of our niches are a little bit different, the people we know, the way we help people varies. Some things are just experimentation. We'll try something to see if it works. Is it resonating with people the way I described this, this social media usage, that type of thing. So by setting monthly mile markers, we can just frankly keep track of how we're doing or whether we want to tweak and change along the way.

Among other things, some of the reliable milestones that you want to track on an ongoing basis are things like the number of website visitors. Very few people ever become a client without having first visited our website. We'll get a real good sense of how many people are on track towards becoming clients by just keeping track of how many people visit the website, the number of social media followers, the number of newsletter subscribers, the percentage of people who open and read our newsletter, and then of course the percentage of inquiry calls that we convert into client. Now that sounds like a lot but a lot of my clients do this on a monthly basis and my guess is it takes them about 6 minutes tops. There are just a lot of really good free tools out there already keeping track of this information for us. It's simply a matter of writing it down and watching the trends.

CHRIS: It does sound simple when you describe it and I know as you do as well that this is one of the things that we get a lot of questions because our generation, those in our listening audience who are pretty much of the age bracket that we are, Kim, we

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didn't grow up with computers. We're not necessarily tech savvy. They are not natural for us. They never will be. They are not like what our millennial generations are growing up with. It's just the way the world is and so even something like being able to track these numbers and know that there are free services that can help us do that can feel like a very daunting thing for many and I just want to underscore again to our listeners, remember, at the end of the broadcast here, I'm going to be pointing out some of the other ways that Kim supports, separate from this podcast entirely, separate from our school, ways that she supports people in being able to set up programmatic approaches to your marketing. You make those kinds of free services accessible for people. They are out there but we don't know how to access them. You help us be able to access them and to figure out how to use them. That's gold in our pocket. That's really valuable.

KIM: Definitely. Okay, 77, what specific action steps will you take towards your 90-day goal? Now, it's time to turn that 90-day goal into specific doable, measurable action steps that you can keep in front of you on a daily basis. All big achievements happen in the same way – one step at a time – but the brain is easily paralyzed and can turn away from a large goal. “Oh, I can't tackle that now. That's too much. I'll get to it later.” It just all seems so hard until we break it into doable steps.

Before we hopped on the podcast today, Chris, I pulled up an email I got from one of my marketing momentum clients about three or four weeks ago. Totally unsolicited, she was just checking in with me. This is just what she said, “I just finished running some numbers on my achievements in the first half of 2016. Some highlights below: 19 new speeches given, two new workshops facilitated, 276 new LinkedIn connections, four new associations joined, 27 new clients,” and this is my favorite number, Chris, “603% increase in revenue.” She said, “I averaged more per month in the first half of 2016 than I made from June 1st to December 31st 2015.” That's before she and I started working together.

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The example that this email sets for us is she did not just set a goal saying, “I want my revenue to increase by 600% and then kind of stare at her computer screen or her calendar wondering, “What do I do? You can see why her revenue increased, because she knew she wanted to give speeches, give workshops, make new connections on LinkedIn, join associations. She took her big goals, she broke it down into doable steps, and the result is she achieved her big goals.

CHRIS: And those are amazing numbers, but I love, as you said, that the real excitement about the thing is not just the numbers themselves but the direct connection between those kinds of numbers - which everybody listening, “But what?” - and the actions that were undertaken that facilitated them. Now the Lord brings the harvest. We are not taking anything away from the Lord in emphasizing that always, every Christian is to be in partnership with the Lord. He blesses our efforts. It’s those intentional efforts, our doing, our works. Faith without works is dead. We don’t just sit there in faith believing the Lord is just going to drop clients on our laps or give us speaking gigs. We do very intentional actions and the Lord then blesses and brings a harvest like that. I love the direct connection there, the very clear evidence. There it is as you opened us up with, the outcome based evidence of the efficacy of these kinds of intentional actions. They pay off. This works time and time again. It works.

KIM: It just works if we work it, yes, but definitely, only the Lord can make it rain clients at the end of the day and we know then thank Him for it. All right, #8, we’re making this smaller and more and more doable. Here’s the question, what specific action steps will you take this week? So you have taken your 90-day monthly action steps you chose and you’re deciding, “What am I going to accomplish this week?” This is a step I take every Monday morning as I plan out my week because what happens is, sometimes at 2 o’clock on a Tuesday or 9 AM on a Friday, somebody cancels on me, something just opens up and I think, “Okay, I have an hour.” If don’t have a written plan, Chris, I can spend 50 minutes of the hour thinking, “What should I do with this hour? Should I do this? No, maybe I

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should do that,” and I can start 10 different activities. My productivity at the end of the weeks where I take time to plan ahead of time and they don’t take time to plan ahead is really marked. I just encourage people to sit down with their goals and make those actionable steps on “This is what I’m going to accomplish this week.”

All right, let’s keep moving, #9, how do you keep your vision and your goal in front of you day after day? What I’ve realized, Chris, is most plans fail not because of lack of ability, but simply lack of attention and focus. We can’t just write out our vision, our goal, our action steps and put them in a drawer, and expect they will get done. Our brains can only hold a limited amount of information and distractions these days are pandemic - at least they are at my house. For myself and for my clients, let’s create a reliable mechanism for keeping those action steps in front of us on a daily basis, those 90-day goals in front of us on a weekly basis, and then an ongoing way to touch base with a bigger vision.

Whether it’s your ritual Monday morning planning session, maybe you could have a Friday afternoon weekly review. I’ve been listening to Greg McKeown from Essentialism and he got in the habit of taking an offsite quarterly review, which I have to say is incredibly powerful. In your regular meetings with your coach, you could review the goals. You can have planning meetings with your spouse. You could make a vision board. You could make electronic reminders. Whatever it is, keep these things in front of you. Don’t rely on your memory.

That brings us all the way up to #10. What one step will you take today to commit to this plan? Thinking back to the study by Dr. Matthews at the beginning of the podcast, she said one of the things that was powerful about making people follow through with a goal was a commitment and accountability. It’s time for those who are listening to think about how am I going to commit and have some accountability? Again, is it with a coach, is it with a mastermind group, is there some other mechanism, but make a decision today. Tomorrow never comes,

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never. We have to start building this business that God is laying in our heart today.

For those of you who are interested, I'd also like to issue an invitation to join me and some of my fabulous clients in our Marketing Momentum program. I only open up registration for this program once a year and it just opened. In the program, participants get group coaching, live training, a robust library or ready to implement tutorials, a vibrant online community, and so much more. As long as there are open spots in the program, I would love to have any of our listeners join us.

CHRIS: I'm going to have to underscore that one for our listeners because if that's something new to you, you'll want to familiarize yourself with it and you can do it easily. Jump on the web and go to Kim's website at KimAveryCoaching.com. If you'll specifically enter in KimAveryCoaching.com/MM, that's for Marketing Momentum, KimAveryCoaching.com/MM, there is a registration information there and as she says, this only opens up once a year. It starts, Kim, I think the week of September 26, 2016, correct?

KIM: It does.

CHRIS: Okay. But always about this time of year too that these podcasts are evergreen. So anybody listening to this podcast in the future, she does this once a year. The program runs for six months, right Kim?

KIM: Yes and then people who are really enjoying the community, which is most of them, and the resources always have the option to stay on. I've had people who have been in the program for three years and they continue to add value to new people coming in.

CHRIS: If it's paying off on your bottom line, which these things do, you can look at it and say, "Well, I spent this. I got this. Okay, that's an investment. That's a great return on my investment there of time, energy, and money." Again, I really

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encourage you to avail yourself of that. While you're out there on her website, also just be aware, there are lots of free resources that Kim provides on marketing for the Christian coaching community. I would encourage you download them all. Access everything. You have a free webinar coming up, don't you?

KIM: I do, next week called From Passion to Profit. So depending when you're listening to this podcast, I plan to deliver a lot of really sound business advice in that free webinar.

CHRIS: Yeah. So that will be there or other free webinars that she does. Kim has a YouTube channel at Kim Avery Coaching out on YouTube, her wonderful little video bites that she does there on marketing and her blogging, just so many rich resources. How could anybody not be thankful for everything that you provide, Kim? This is great.

Let me just reiterate the points that Kim has covered. She has challenged each of us to ask:

- 1) What is the five-year business goal that you're working on?
- 2) What would achieving that bring you, very specifically, financially, emotionally, relational?
- 3) What are the specific business objectives that you want to pursue for these next 90 days?
- 4) How are you going to celebrate achieving those goals?
- 5) Where are you right now? Stop and assess your current position on launching into this.
- 6) For these next 90 days, what are the monthly milestones that you want to meet, really chunking everything down?
- 7) What specific action steps will you take toward those 90-day goals?

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8) What specific action steps will you take this week? Now we're really down to the micro.

9) How will you keep your vision and your goal in front of you day after day? It's so easy to get distracted. It's so easy to get caught up in the urgent.

10) What one step will you take today to commit to this plan? Kim, you delivered for us in spades as you always do. Thanks very much.

Listeners, if you want more of this, of course you can always go to our website. There are past episodes where Kim has talked to us about other tips and pointers on effective marketing.

That's on the web at ProfessionalChristianCoachingToday.com. Until next week, keep raising the standard of coaching and changing the world.

KIM: God's richest blessings to you.