

How to Design a Signature Program Worksheet

1. What are the PROBLEMS your ideal clients have that you are qualified to help them solve?

Ideal Client Problems	Outcomes You Provide	What You Do	Steps Required

2. What are the DESIRES your ideal clients have that you are qualified to help them fulfill?

Ideal Client Desires	Outcomes You Provide	What You Do	Steps Required

How to Design a Signature Program Worksheet: EXAMPLES

These are examples for two types of businesses.

1. What are the PROBLEMS your ideal clients have that you are qualified to help them solve?

MARKETING/BUSINESS COACH & CONSULTANT

Ideal Client Problems	Outcomes You Provide*	What You Do	Steps Required
Struggling to get clients	They will know who their ideal clients are, what those ideal clients really want, and they will have a signature program that gives those ideal clients exactly what they want <i>so they can</i> better attract and retain clients.	1. Teach how to ID ideal clients 2. Teach how to ID ideal client pains and desires 3. Teach how to design a signature program	1. ID ideal client 2. ID definable outcome 3. ID process (what they do) 4. Break process into steps 5. Determine program term 6. Price program
Not making enough money	They will have a signature program that can get them to their income goals within the number of hours they want to work <i>so they can</i> make the money they want to make.	1. Teach how to set revenue goals 2. Teach how to calculate # of clients and hours 3. Teach how to project monthly cash flow 4. Teach how to ID hard costs	1. Set revenue goals 2. Determine number of clients needed 3. Calculate hours & double 4. Complete cash flow projections 5. Determine hard costs
Worried they will have to give up the business and go get a job	They will have a 90-day marketing plan designed to get them the number of clients they need so they can achieve their monthly revenue goals.	1. Teach how to pick marketing activities 2. Teach how to set marketing goals & number of clients 3. Teach how to create plan	1. Review possible marketing activities 2. Select best activities 3. Map out 90-day plan 4. Track & fine-tune plan
Don't know how to market themselves or sell their services	They will know the best ways to market their services <i>so they can</i> reach their ideal clients. They will know how to sell their services in a way that is comfortable and does not feel salesy <i>so they can</i> convert prospects into paying clients.	1. Teach how to pick marketing activities based on strengths & likes 2. Teach 10-step consultative sales process	1. Personal Business Style Assessment 2. Marketing Activity Selector 3. 90-Day Marketing Plan 4. 10-Step Consultative Sales Process 5. Tracking worksheets

**Notice I'm not just saying: Get more clients and Make more money. That's too broad and generic.*

WELLNESS COACH

Ideal Client Problems	Outcomes You Provide*	What You Do	Steps Required
Overweight and tired of constantly dieting and regaining the weight	They will know the specific dietary and exercise changes they need to make that fit with their lifestyle <i>so they can</i> lose the weight and keep it off.	1. Assess where they are 2. Help them set goals 3. Help them create food plan 4. Help them choose a fitness program 5. Do weekly check-in's 6. Provide support & encouragement 7. Be available on-call	1. Intake assessment 2. Goals process 3. Eating plan 4. Exercise plan 5. Weekly accomplishment & set back form 6. Motivational goals email program
Tired, body aches, and feel older than their years	They will have achievable goals for weight loss and exercise and someone to support and hold them accountable <i>so they can</i> achieve their goals, and reduce or eliminate their symptoms <i>so they</i> feel better, younger, and have more energy.	1. Assess aches & pains 2. Determine desires 3. Set goals 4. Refer to alternative health practitioners as necessary 5. Create food & fitness plan	1. Intake assessment 2. Goals process 3. Eating plan 4. Exercise plan 5. Weekly calls/meetings 6. Weekly energy check up 7. Referral program
Beginning to have lifestyle-related health issues such as diabetes	They will know how to eat, exercise, and lose weight in a way that works for them <i>so they can</i> prevent, and potentially reverse, lifestyle-related health issues.	1. Assess health issues 2. Set goals 3. Weight loss plan 4. Food plan 5. Fitness plan 6. Refer as necessary	1. Intake assessment 2. Goals process 3. Eating plan 4. Exercise plan 5. Weekly calls/meetings 6. Monthly symptom check in 7. Referral program
Overwhelmed and confused by all the diets, books, and fads. Don't know what to believe or what to do to lose weight and get healthy.	They will have private access to an educated voice of reason and sounding board <i>so they know</i> what is a fad and what is sound advice and can stop jumping from diet to diet.	1. Unlimited email access 2. Provide research-based education 3. Customized food & fitness plan	1. Provide monthly articles based on sound research 2. Weekly calls, Q&A 3. Fad alert emails 4. Food & fitness plan

**Notice I'm not just saying: Lose weight, Feel Better, Improve your quality of life.*

2. What are the DESIRES your ideal clients have that you are qualified to help them fulfill?

MARKETING/BUSINESS COACH & CONSULTANT

Ideal Client Desires	Outcomes You Provide*	What You Do	Steps Required
Want the freedom and flexibility of being in business for themselves	They will have a business that is designed just for them based on their financial and lifestyle goals <i>so they know</i> it's viable and will give them what they want.	1. Teach them how to design business and signature program to reach their financial & lifestyle goals	1. Business Design Process 2. 5-Step Design a Signature Program Process 3. 5-Step Financial Viability Process 4. Marketing Activity Selection Process 5. Marketing Plan Design 6. Sales Process
Want a business that enables them to pursue their calling or passion and financially support themselves and their family	They will have a custom designed and branded business based on their unique set of experience, education, expertise and passion, <i>so they can</i> attract their ideal clients, make a difference in their lives and make good money.	1. Teach them how to design business and signature program 2. Teach them how to brand themselves 3. Help them ID ideal clients	1. Toolbox Inventory 2. Personal Business Style Assessment 3. Core Values Process 4. Ideal Client Identification 5. 5-Step Signature Program Design Process 6. 4-Step Branding Process
Want the confidence they know what to do, and how to do it, to make their business whatever they want it to be	They will know the specific steps they need to take to make their business enjoyable and profitable <i>so they can</i> take those steps and create the business and income they desire.	1. Teach them all the steps necessary to package, brand, market, and sell their services and reach their goals	1. Do Personal Inventory 2. ID Niche 3. Design Business 4. Design Marketing Message 5. Brand Business 6. Client Attraction & Sales 7. Marketing Plan

**Notice I'm not just saying: Be more successful, Make more money, and Follow your passion.*

WELLNESS COACH

Ideal Client Desires	Outcomes You Provide*	What You Do	Steps Required
Want to look good	They will have a custom designed eating and exercise plan and constant support and accountability <i>so they can</i> achieve their goals.	1. Assess where they are 2. Help them set goals 3. Help them create nutrition plan 4. Help them choose a fitness program 5. Do weekly check-in's 6. Provide support & encouragement	1. Intake assessment 2. Goals process 3. Eating plan 4. Exercise plan 5. Weekly accomplishment & set back form 6. Motivational email program
Want to feel good	They will have positive feedback and support <i>so they</i> don't feel alone and they start feeling better immediately even before they reach their ultimate goals.	1. Do weekly check-in's 2. Provide support & encouragement 3. Be available on-call	1. Weekly accomplishment & set back form 2. Motivational email program
Want to be able to do all the things they desire (e.g. run, play with kids, play tennis)	They will experience weight loss, increased energy, and reduction or elimination of aches and pains, <i>so they</i> feel good enough to start doing the things they want to do.	1. Determine desires 2. Set goals 3. Refer to alternative health practitioners if necessary 4. Create food & fitness plan	1. Intake assessment 2. Goals process 3. Eating plan 4. Exercise plan 5. Weekly energy check up 6. Referral program
Want food to stop ruling their life	They will be educated about food and nutrition, and they will have an eating plan that works in their life <i>so they</i> feel differently about food and can stop obsessing about it and start enjoying meals and dining out again.	1. Provide nutrition education 2. Develop eating plan 3. Create dining out plan 4. Work on mindset	1. Nutritional values handout 2. Eating Plan 3. "How to recover" plan 4. Dining out plan 5. Mindset process

**Notice I'm not just saying: Look better, Feel better, Have more energy, Feel better about food.*

NOTE: I've italicized the phrase "so they" in the Outcomes because that phrase is the start of the true outcome. You help them do something *so they can* BE, DO, or HAVE what they really want. They're less interested in your process (what you help them do) and more interested in what that process *does for them*. Try to include "so they can" or at least "so they" in all your outcomes.

How to Design a Signature Program

Creating Your Program

Once you have identified your ideal clients' problems and desires, the outcomes you provide, and you've broken down your process into individual steps, you're ready to create your program. Simply follow the steps below to create and price your program. There's a worksheet on the next page where you can fill in your information.

- Step 1:** **Organize your steps into a cohesive, chronological order.**
Review all the steps you need to take your clients through, or do for them, and begin organizing them into a logical order. What do you need to do first? What comes next?
- Step 2:** **Decide how long you need for each step.**
How long do you or your clients need to complete each step? Or, how much time do you want to allot for each step? This could be measured in days, weeks, or months.
- Step 3:** **Add up the time for all your steps to determine your program term, typically measured in weeks or months.**
- Step 4:** **Determine the value of the program outcomes to your ideal clients.**
Refer back to the list of specific, tangible outcomes your program will provide your clients. Ask yourself what those outcomes are worth to them. Consider financial value as well as emotional or lifestyle value.
- Step 5:** **Price your program.** Base your price on the value of the outcome for your clients, NOT in terms of what it costs to deliver the program (e.g. it takes 7 hours of your time at \$100/hour = \$700...that is NOT how I want you to set the price). Consider what it would cost your clients NOT to get that outcome and to stay where they are right now. Lastly, trust your gut and if a number comes to you, start with that—it's likely what I call an "inspired" price and it's a great place to start. One of the keys to selling successfully is feeling totally confident that what you're selling is absolutely worth the price—you know beyond a doubt that your clients will get at least that in value if they engage your services.

Step	Your Process – Be Specific	Timeframe to Complete Step
Step 1		
Step 2		
Step 3		
Step 4		
Step 4		
Step 5		
Step 6		
Step 7		
Step 8		
Step 9		
Step 10		

PROGRAM TERM (add up the time for all steps): _____

PROGRAM PRICE:

Dollar value you place on the outcomes your program delivers. This is your program price: \$ _____

INSTALLMENT PRICE:

Program Price \$ _____ divided by Program Term in months _____ = \$ _____ /per month

(If you choose to offer a payment plan)

How to Design a Signature Program

Financial Viability Worksheet

Once you have created and priced your signature program, you need to make sure you can get to your revenue goals with it, within the number of hours you're willing to work each week. Use this worksheet to determine that. And if your math doesn't work, now is the time to make adjustments.

Step 1: Establish 2 Monthly Revenue Goals

- 1) Your Monthly Cash Flow Requirement (*how much you need to make*)
- 2) Your Ideal Monthly Revenue Goal (*what you'd love to make*)

Step 2: Calculate Number of Clients

Look at your Signature Program Price and determine how many clients you need to sell into your Signature Program each month to reach your two goals.

Step 3: Calculate Hours Per Client Per Week, and Total Hours Per Week

If it takes 2 hours to service each client per week, and you need 10 clients to reach your goal, that's a total of 20 hours per week.

Double Those Hours

You'll need to plan to spend at least as many hours per month on marketing and administrative tasks as on delivering your services. So you need to double the weekly hours you came up with in the exercise above to determine your total weekly hours for the business.

EXAMPLE:

(A) Minimum Monthly Cash Flow	\$5000
(B) Signature Program Price	\$1000
(C) Divide A/B = # of Monthly Clients	5
(D) Weekly Hours Per Client	2
(E) Multiply C x D = Client Hours Per Week	10
(F) Multiply E x 2 = Total Hours Per Week	20

CALCULATE YOUR PROGRAM

(A) Minimum Monthly Cash Flow	\$
(B) Signature Program Price	\$
(C) Divide A/B = # of Monthly Clients	
(D) Weekly Hours Per Client	
(E) Multiply C x D = Client Hours Per Week	
(F) Multiply E x 2 = Total Hours Per Week	

Step 4: Calculate Your Revenue Projections

You can use the accompanying Cash Flow spreadsheet. This is where you'll take payment plans and any hard costs into account.

Step 5: Identify any Client-Service-Related Hard Costs

Include on your Cash Flow spreadsheet. Keep in mind you may not have any. Do not include general business expenses; only include client-service-delivery-related costs.