



# *Journal*



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For questions regarding this matter, please contact:

Jo Self  
[jo@discoverjoself.com](mailto:jo@discoverjoself.com)

# JOURNAL

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I've designed this journal for you to keep track of where you are on your journey as well as record your thoughts as you reflect on where you want this journey to take you. Inside, you'll find checklists, thoughtful questions, and plenty of space to add your own insights.

**I want you to keep in mind two things**, and these are two things that have kept me going and served me incredibly well in my own journey of being an entrepreneur since 2007.

When I lean into my CliftonStrengths, when I show up as the person I can't help but be, I am the best possible me I can be for my clients. I fall into imposter syndrome as easily as anyone else. When I lose my way, I take a moment and remember why people seek me out in the first place. And this grounds me and brings me back to my center, to my purpose.

If you haven't taken your CliftonStrengths, I strongly encourage you to do so. It is the best \$60 investment you will ever make in yourself. If you choose to work with me, the assessment will be included as part of the plan.

**And second**, when I started my journey I was so overwhelmed and felt like nothing I was doing was clicking. I subscribed to Notes from the Universe by tut.com to receive motivational messages daily. And just when I needed it most (I was on the verge of giving up), this message came to me:

Tiny, little dreams require tiny, little thoughts and tiny, little steps.  
Great, big dreams require tiny, little thoughts and tiny, little steps.  
Get the picture?

So, please, no matter where you are on this journey – just starting out or giving it one last go – do me a favor:

**DREAM BIG. IMAGINE THE POSSIBILITIES.**

**AND TAKE THE FIRST STEP**

– it's the scariest, but also the most rewarding.



*discover.*  
JO SELF

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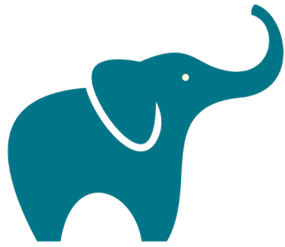
JO SELF, DiscoverJoSelf  
*Strategic Partner for Coaches & Consultants*  
*Content Strategist; Idea Accelerator*

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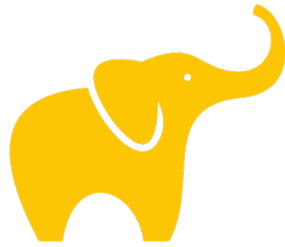


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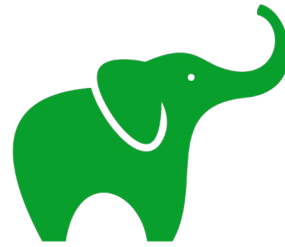
*How do you eat an elephant? One bite at a time*



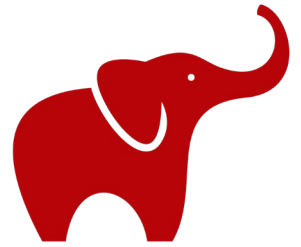
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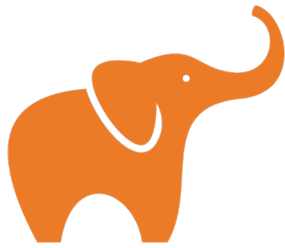
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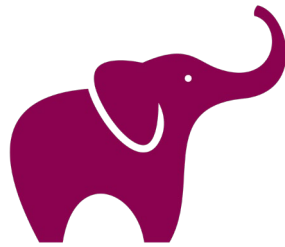
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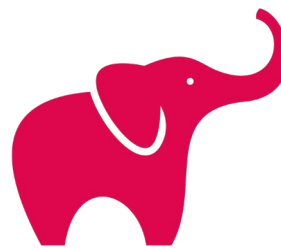
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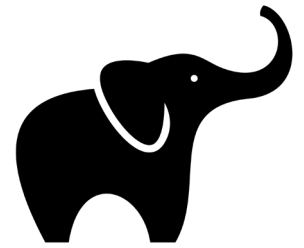
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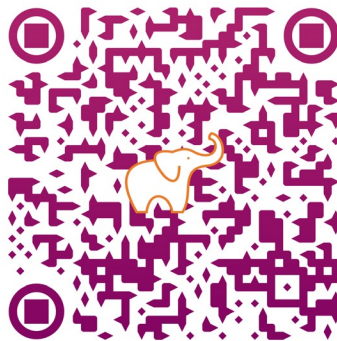


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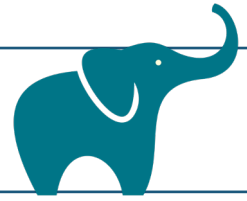
The video library is coming soon (expected launch Sept 7), please be sure you're on our email list to be notified the minute it becomes available. Scan the code or click the link.



<https://mailchi.mp/6735fc27ac99/coaching-essentials-kit>

# GET CLARITY

Know where you are and where you want to go



This is where you start putting the thumbtack on your map. A destination and a map only serve a purpose if you know where you're starting – otherwise, the map is useless.

## **know your strengths**

If you haven't taken the CliftonStrengths assessment yet, I highly urge you to do so. The depth of knowledge that one will learn from this assessment alone is worthy of every cent of the investment. If you don't know your strengths, ask friends and family what they think you do well and look for the patterns that come up.

List your top 5 and use short phrases and descriptive words to claim what that means for you  
EX. Strategic: likes exploring possibilities, needs a plan, looks for options, flexible

1.

2.

3.

4.

5.

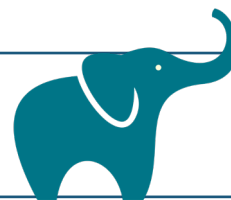
What stands out to you? What patterns or commonalities do you see?

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# GET CLARITY

Know where you are and where you want to go

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## ***know your brand***

**who are you? why do you do what you do?**

What gets you out of bed in the morning and excited to face the day?

What is your background (educational, professional, life)?

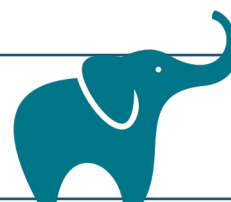
What are topics you can talk about endlessly – and passionately?

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# GET CLARITY

Know where you are and where you want to go

---



## ***know your audience***

**who needs you? who inspires you? who do you relate to?**

Who inspires you? What kinds of people do you love talking with?

Who do you most relate to? Think of positions you've held, industries you've worked in, and roles you've played – both professionally and personally.

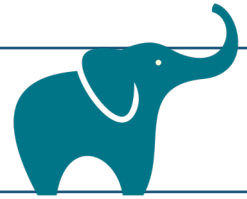
What do you think your audience needs help with? What are they struggling with?

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# GET CLARITY

Know where you are and where you want to go

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## ***know your value***

**what do you offer? what are your credentials? what is your experience?**

What makes you qualified to be a coach? This is not just about credentials, this is about your life and work experience as well as skills, e.g. speaking more than one language.

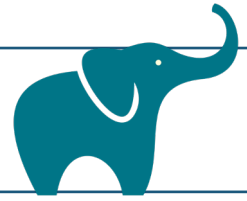
What kind of coaching do you want to do? Are you an advice giver? An emotional support person? An explorer?

What comes easy to you? What capability or skill do you have that people frequently marvel at?



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# GET CLARITY



Know where you are and where you want to go

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## ***know where you work***

**locally. regionally. globally. online.**

In this hybrid world we live in, knowing where you want to work is just as important as deciding with whom you want to work. Do you want to travel? Great. Where? How often? Do you prefer to stay local? Fine. Who's the market? Are you comfortable working online? Do you prefer in-person only?

Use this space to jot down your thoughts and weigh out your options as you explore the WHERE/HOW of your offerings. Perhaps a Pros and Cons list would be helpful if you are weighing your options.

# MINDSET

Get your head straight and set the right expectations from the get-go



**embrace  
growth**



**be resilient**



**welcome  
risk**



**money  
is good**



**passion  
& purpose**

Consider the following questions. You have space to jot down thoughts on this and the following page. If you prefer to process verbally, you might also consider having a coach, friend, or relative ask you these questions.

How easily do you roll with the punches?

What stresses you more than anything?

How risk tolerant are you?

Are you a perfectionist?

What are you truly passionate about?

What does success look like to you?

Are you motivated by money? If not, what will motivate you to charge what you're worth?

What are you truly passionate about?

Are you able to learn in the process?

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# MINDSET

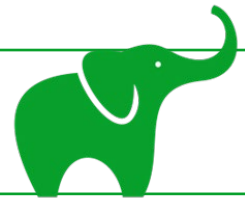
Get your head straight and set the right expectations from the get-go

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# THE NITTY GRITTY

The bits and bobs that you need to make a business work



Use this space to keep track of your research, quotes, logins and passwords. For building a budget, consider a template provided by Google or this site:

<https://www.smartsheet.com/content/start-up-business-budget-template>

## **insurance**

Providers, quotes, policies, options, etc...

## **biz setup**

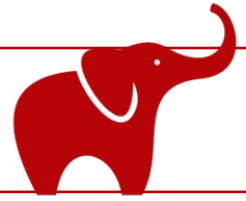
Structure options, taxes, contacts...

## **payments/expenses**

Bank accounts, credit card fees/options, processor (Paypal/Venmo/etc), dedicated business credit...

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# PROCESSES



The pieces that keep you moving and growing

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## **packages**

**simple. minimal. one thing.**

What is the one thing you want to be known for? This is not going to limit you, but rather focus you. People need to know why to hire you or why to recommend you. If your offer is fuzzy, you won't attract the right people – or perhaps anyone at all.

Consider the following questions:

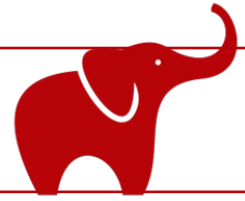
- Will you offer one-on-one coaching?
- Do you prefer to work with groups?
- What will be the first encounter people have with you?
- What does an introductory offer look like?
- What are the next steps after they finish the first one?
- Will you charge hourly (I don't recommend it) or in packages (much better)?
- What does the journey with you look like? Short term? Long term?

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# PROCESSES

The pieces that keep you moving and growing

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## **client management**

### **keeping track...**

There are great CRM tools out there, but perhaps a simple Excel sheet would do. How disciplined are you to keep track? What information will you want to keep track of? Will you hire someone to help?

## **forms**

### **intake. surveys. testimonials.**

Google Drive and their Forms are a tool you should become friendly with. You can send out forms and also capture responses in Google Sheets (their version of Excel). And best of all, it's free. What information do you need about a client before you start work with them? What information might you capture to improve your services. For testimonials, I like to use the questions below. You can send them in an email (or link to a form) or you can ask them if they prefer to be interviewed. They can write it or you can write it for them and then send for approval. Make it easy for them.

To get a great testimonial ask these questions:

- What was the biggest challenge(s) you were facing that drew you to work with me?
- How did we solve your challenge or problem?
- What would you consider your biggest win having worked with me?
- What did you enjoy or appreciate about working with me?
- If you were to recommend me to a close friend, what would you say?
- Anything else you'd like to add?

# MARKETING

Know where you are and where you want to go



## WEBSITE

Even if you're not ready for a website, it's best to check and see if your domain name is available. If it is, grab it. Nothing worse than having your heart set on a name and it not being available – trust me, I know from experience. Also, there are options now beyond .com and .org, however, careful with being clever as some forms and websites don't always recognize those new domain endings if you're trying to register somewhere.

LIST OF POSSIBLE DOMAIN NAMES:

## SOCIAL PROFILES

You don't have to be on social media 24/7. I promise. In fact, too much can hurt you. For example, LinkedIn tends to penalize people who post more than 20x a month. However, having a consistent message and appearance will serve you well and it's the first thing that will pop-up on Google when someone searches for you. Make sure whatever name you chose to use as your identity is similar across platforms. I am @discoverjoself across most platforms. On LinkedIn, it's just /in/joself. And please, if nothing else, make sure you have personalized your link on LinkedIn and not left it up to them.

Where do you most like to hang out online?

Where is your audience?

What are possible "handles" for you? (like my @discoverjoself)

If not using social media, how will you connect with potential clients?

# MARKETING

Know where you are and where you want to go



This is about clarity around your WHY. When you speak passionately about what you believe in, you attract those who need to hear your message. As for Client Attraction, it's all about sharing that message in a variety of ways. It's 20% content and 80% marketing. What is your

Core Message? And remember, while you may not be inspired to do videos, there is a way to do it without being seen. YouTube is a great place to be as it's the 2<sup>nd</sup> most used search engine after Google.

What are topics you frequently talk about?

Are there quotes that are significantly meaningful to you? Write them here.

What books have been most meaningful to you and why?

What is a lesson you have learned or wisdom which has been shared with you that you continue to pass on to others??



# MARKETING

Know where you are and where you want to go



## MATERIALS

What do you really need? When you think about your marketing materials, less is more these days. Even at conferences, so much is shared via a QR code to keep waste to a minimum.

Now, when it comes to design, you can use a tool like Canva to help get you started (or you can hire me – I love this stuff!). Being consistent with your design is crucial for brand recognition. Choose your colors wisely. Consider the types of photos you will use. Have a PowerPoint template ready to go. This is a reflection of YOU and you want to shine no matter what. Nothing breaks my heart more than to see poorly designed materials (especially PowerPoints) undermine an amazing coach.

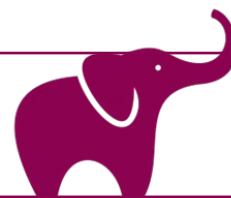
**Color palette:** Consider a favorite work of art, your favorite colors, colors that would resonate with your core audience. There are websites that let you pick colors out of a photograph or a painting, like, <https://colors.co/image-picker> Capture some HEX numbers here or paste colorblocks.

**Images:** Find images that are consistent. If you look at my website, the majority of them are similar in shading and all have light or lightbulbs used in some way. Sites like Pexels, Pixabay, and Unsplash are all great places to get free images. Jot your ideas or paste sample images here.

**Business Cards:** I haven't given a physical card out in a couple of years. I currently have Mobilo, a digital card that someone can scan and add me to their contacts and send me their info as well. There are others out there and the cost is nominal. I highly recommend this option for cost-effectiveness and environmental care.

# CLIENT ATTRACTION

The personal touches and the communication points



Funnel, frequency, content? What are your ideas to stay in touch?

***email***

Facebook group, Slack, Discord... what works for you?

***digital platforms***

***old school***

Does snail mail ever make sense? Holidays, birthdays, token of appreciation?

***personal touch***

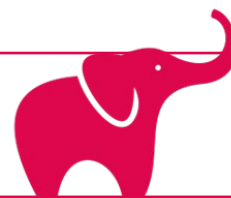
How can you personalize your work or recognition for your clients?

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# SELF-CARE

Without you, the business doesn't exist, so take care of YOU

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Are you taking time for you? Here are some suggestions to help you stay focused and to make sure that you don't forget some time for YOU in the process of building your dream business.

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**Gratitude Journaling:** Each day, write down three things you are grateful for. This exercise helps shift your focus to the positive aspects of your life, fostering a more optimistic mindset.

**Affirmations:** Create and repeat positive affirmations daily. These are short, uplifting statements that reinforce beliefs and goals. For example, "I am confident and capable of achieving my dreams."

**Visualization:** Take a few minutes each day to visualize yourself successfully accomplishing your goals or facing challenging situations with confidence. This exercise can boost your self-confidence and motivation.

**Reframing Negative Thoughts:** Whenever you catch yourself thinking negatively, challenge those thoughts by reframing them in a more positive or constructive way. This helps break the cycle of negative thinking patterns.

**Mindful Breathing:** Practice deep breathing exercises or meditation to bring yourself into the present moment. This helps reduce stress and anxiety while promoting mental clarity and focus.

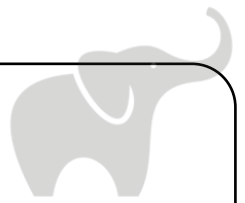
**Fun Time:** Be social. See your friends. Spend time with family. Give yourself a break from the business and laugh a little.

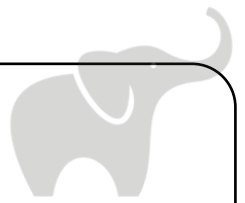
**Spoil Yourself:** Have a mini-retreat at home, go to the spa, do something to spoil yourself - and even reward yourself - for all you're doing to build for your future.

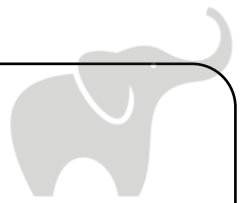
**Quiet Time:** Read a book. Take a walk through the woods and ground yourself in nature. Stick your feet in the grass and bathe in the sunlight. Meditate.

**Exercise & Stretch:** Move. Get out. Have a routine or do it in spurts throughout the day. Stimulate the blood flow and make sure you're moving to keep that energy going.











## *Does this still feel overwhelming?*

You don't have to do it alone. Consider joining our Practical Strengths Mastery Network, where you'll find like minds at different stages in the process - and all of them willing to help you grow and be successful.

We hold twice-monthly webinars sharing activities and strategies to build our skills and our business. I can guarantee you will find a creative and generous space to support you on your journey. And you never know - you might find a kindred spirit or a collaborative partner as well.

Or consider booking a 60-min 1:1 coaching session with me for just \$77 (a \$149 value). Click the button or link below.

**BOOK SESSION**

<https://calendly.com/joself/8-elephants-60>

**JOIN THE NETWORK**

<http://discoverjoself.com/membership-launch>

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