



Coach & Consultant Startup *Essentials*

The basics to start your solopreneurship.

You'll make mistakes along the way.

Just be sure to make the mistakes that serve you  
and move you forward.

*discover.*  
JO SELF  
<http://discoverjoself.com>



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*discover.*  
JO SELF

# ABOUT THE Author

STRATEGIC® • ACTIVATOR® • MAXIMIZER® • COMMUNICATION® • IDEATION®

## JO SELF, DiscoverJoSelf

*Strategic Partner for Coaches & Consultants  
Content Strategist; Idea Accelerator*

The question I most often receive is, “Why do you do what you do?” The most honest response is that I wish there had been a ‘me for me’ when I started as an entrepreneur in 2007. I spent a lot of money on all the wrong things thinking it would magically give me the answers – or at least get me a bit closer to success. Frankly, it was frequently the opposite. And even though I knew my CliftonStrengths®, I wasn’t making the most of them or using them to their advantage.

In 2015 I had a revelation. I was 42, and still no closer to knowing what I wanted to be when I grew up. Couple that with a cancer scare along with my 1-year-old little boy and whoa! It was my wake-up call, my big A-HA! I knew I had to make a change. With a good bit of reflection and honesty, I realized the one thing that had stayed constant was my love for Strengths. I picked up the phone, called Gallup and 8 weeks later was in Mexico City certifying (in Spanish!) as Peru’s first Gallup Certified Strengths Coach.



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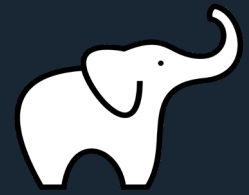
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*discover*  
JO SELF

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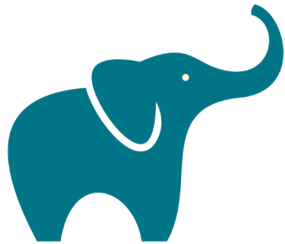
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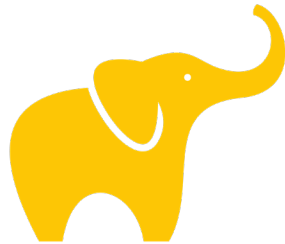
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# Introduction —

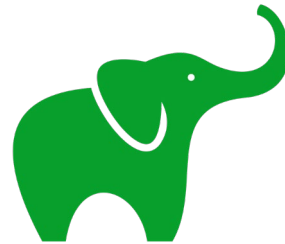
*How do you eat an elephant? One bite at a time*



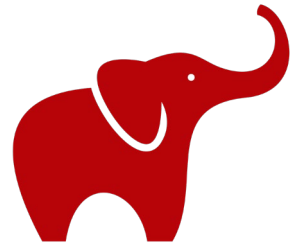
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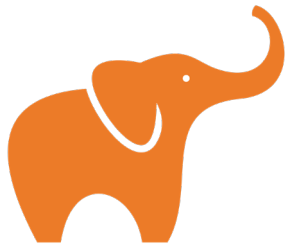
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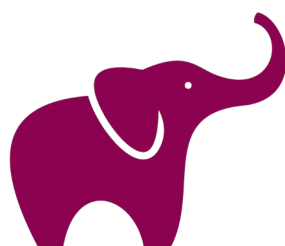
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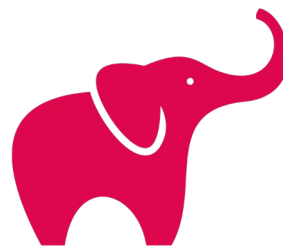
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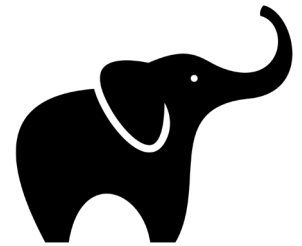
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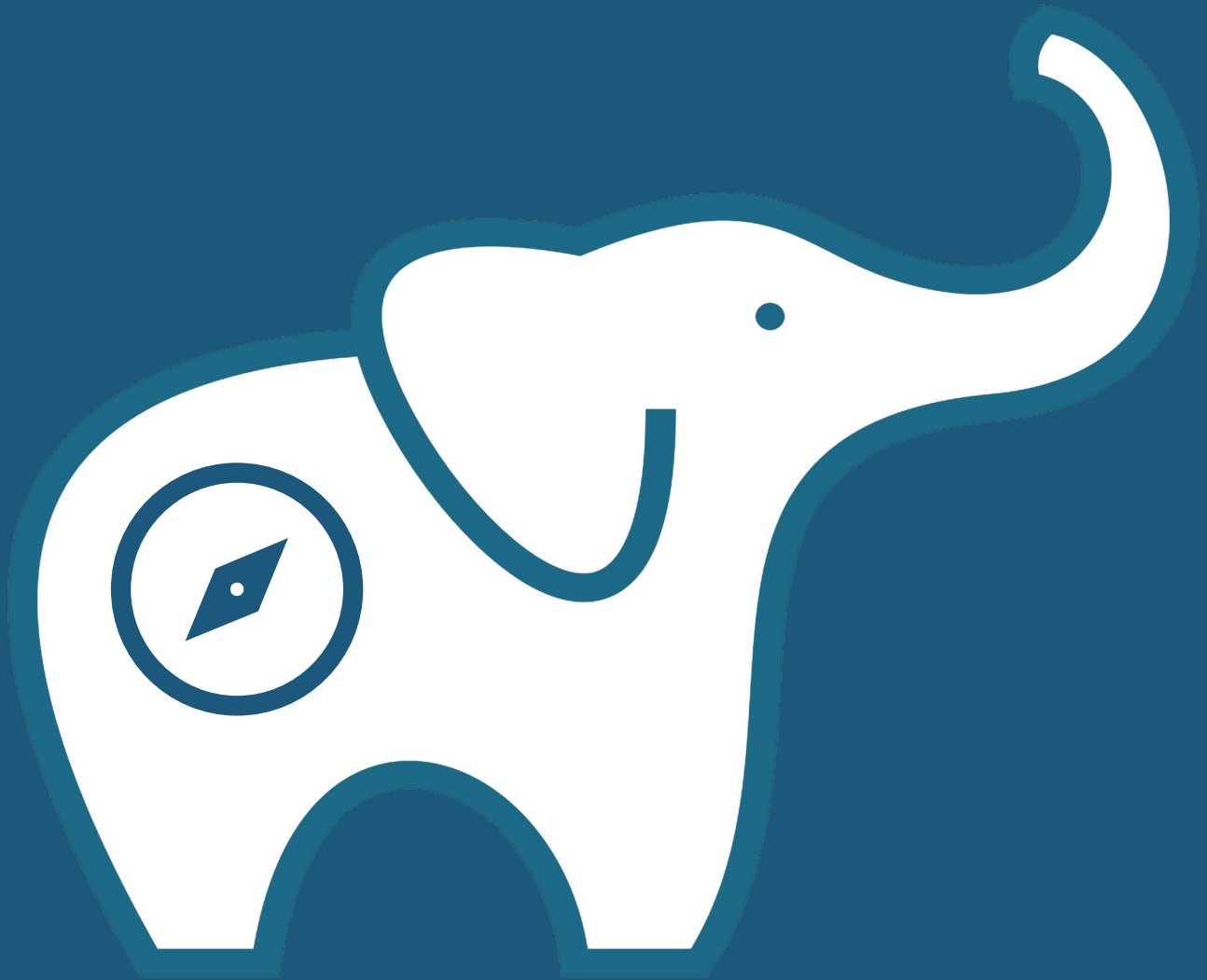
Starting out as a coach or consultant is hard work. And if you don't have a roadmap - or checklist - you're likely to make unnecessary mistakes.

By all means, you WILL make mistakes; but make the RIGHT ones - ones that move you forward and create opportunities. Not the ones that lead you to think you're a failure and this was all for naught.

Too many marketing experts treat independent service providers as a large business or commodity. They couldn't be further from the truth. What works for Starbucks is not likely going to work for you.

I'm here to share my own journey, the mistakes I've made, and how I corrected them along the way - all so you don't have to make the same mistakes I did. I want you to be successful and making money as soon as possible. So, let's dive in and see what these elephants are all about...

# Chapter One



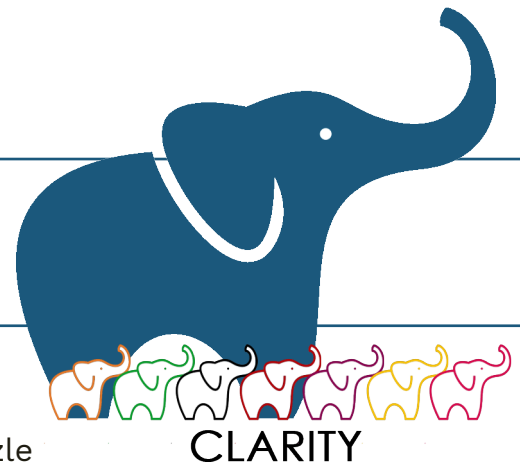
## GET CLARITY

Know where you are and  
where you want to go

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# GET CLARITY

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Before you move forward, you need to know not only where you're starting, but where you want to go. Just having the destination in mind is only a piece of the puzzle – the beginning of the journey is equally important.

## **know your strengths**

### **what sets you apart from the rest?**

I always start with CliftonStrengths. If you have taken the assessment, fantastic, you're already one step in the right direction. If you haven't, I highly recommend it. Understanding your natural talents is a HUGE piece of the puzzle on how to build the business that's right for you.

## **know your brand**

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

The key component that will yield the biggest results is understanding who YOU are and what YOU bring to the table. Your history, experience, and knowledge are invaluable to creating your foundation and brand. While starting with your avatar in mind – or rather your ideal client – might work for a product, YOU are the product in this case and some of the traditional marketing rules go out the window.

## **know your audience**

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

This is different from identifying your ideal client. This is more about knowing WHO inspires YOU – not who YOU want to inspire. It's who you love working with. Who you feel most connected to. At the end of the day, if you love the people you are serving, you're 10x\* more likely to keep showing up and doing it with passion and enthusiasm versus dreading getting out of bed. \*Number totally made up, but feels about right

## **know your value**

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

Perhaps you carry one or more certifications (and maybe you don't – that's ok, too). You have a certain level of education. You definitely have ample life experience. Unfortunately, we often devalue ourselves because we do what we do so easily that it doesn't seem particularly unique or interesting. You're wrong. It IS valuable and it IS interesting. People aren't buying your time; they're buying what you know and what you've lived.

## **know where you work**

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

Are you willing to travel? Do you prefer to work anywhere they need you or only within a certain area or region? Will you be online? In person? Both? Do you want to work in offices or schools? With individuals or groups? These are all questions to consider as you narrow down your direction.

# Chapter *Two*



## MINDSET

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

# MINDSET



Mindset is an ongoing process. Keep these tips in mind, adapt them to your journey, and always strive for personal and professional growth. And don't forget to enjoy the ride!



## ***embrace growth***

Believe in your ability to learn and grow. Challenges are chances to improve, failures are lessons, and a positive attitude helps you bounce back. No one starts from perfection. Learn along the way, 60% is usually good enough to get moving.



## ***be resilient***

Roll with the punches in your solopreneur journey. Solve problems, stay focused on the long-term, and lean on mentors and supportive networks when things get tough. Launching your own business is not a short game.



## ***welcome risk***

Don't fear uncertainty; see it as an opportunity. Take calculated risks, be open to trying new things, and learn from the outcomes. It's how you grow and innovate. Ditch perfection and be ready to fail fast and fail forward.\*



## ***money is good***

Have a healthy relationship with money. Use it as a tool to fuel your vision and make a positive impact. Focus on sustainable revenue, manage expenses wisely, and keep learning about finances.

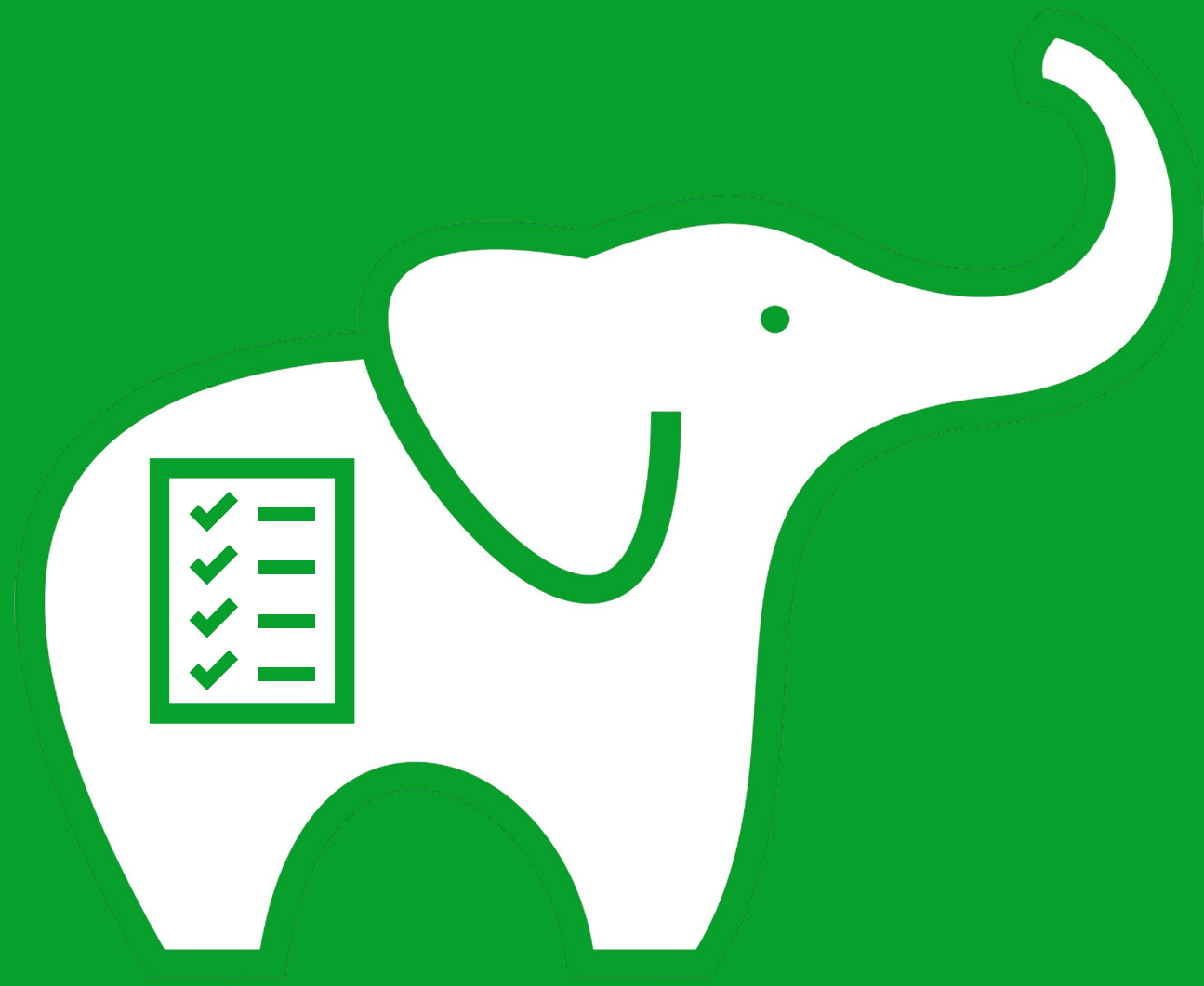


## ***passion & purpose***

I can't stress this one enough. Connect with your values and purpose. Your business goals should align with what truly matters to you. Remember, financial success comes from creating value and serving others.

\*Generally attributed to John Maxwell

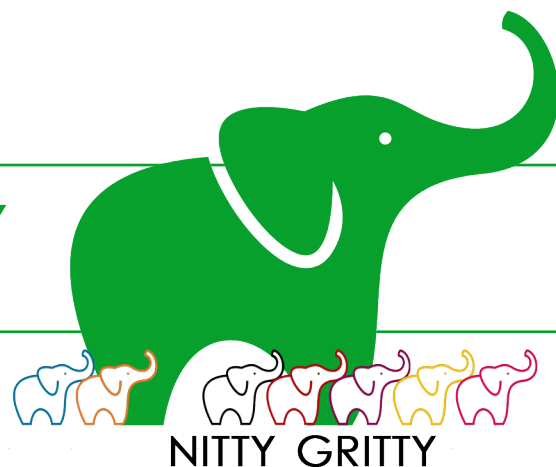
# Chapter *Three*



## THE NITTY GRITTY

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

# THE NITTY GRITTY



The little details that have a big role in our businesses. It's important to set yourself up for success as early as possible. It doesn't need to be perfect, and systems can evolve, but covering the basics is a huge head start that will get you off on the right foot.



## insurance

Check your local requirements for insurance. You may need varying types, e.g. if you work online or are collecting any information (like emails), having virtual security insurance is a must.



## biz setup

I highly recommend visiting your local SBA office/or SCORE volunteer who can help assess your needs. Colleges often offer free services as well. If not in US, search for small business help in your area. It's usually free or for a nominal fee.



## payments

There are many options here, PayPal, Stripe, Venmo, Zelle. At the end of the day, you must find a system that allows you to accept payments in the most convenient manner for your client, especially if you want to accept credit cards.



## tools

Email – sending and collecting; domain, hosting and website; scheduling; calendar; payments; CRM, online meetings. All things that need to be considered. Find my favorites in the “tools” section - p. 21.



## taxes

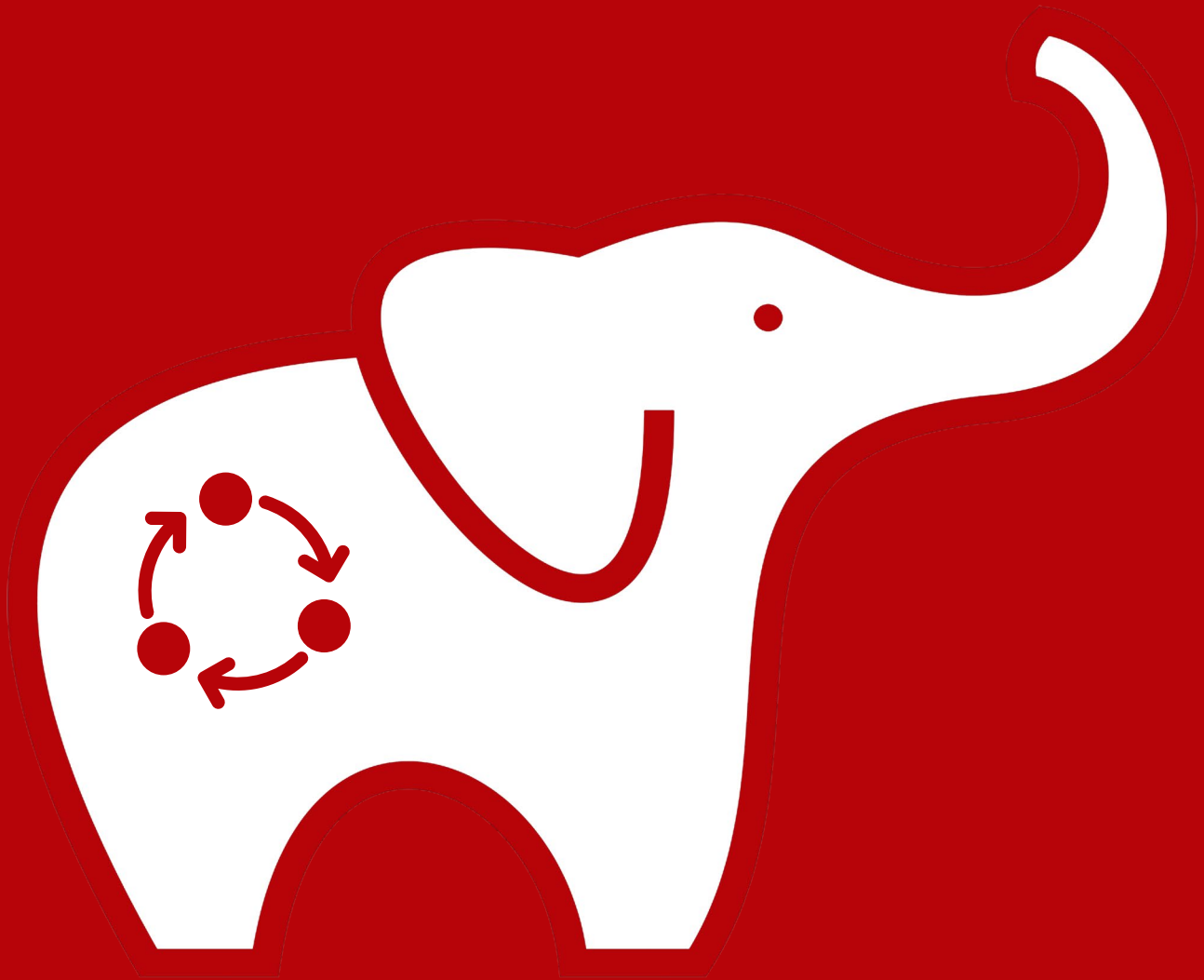
Along with your business setup, consider the structure you need for the most benefit on your taxes. You may need to pay quarterly estimated taxes as well. Also consider if you need to include sales tax in your pricing.



## expenses

It's best to have a dedicated business account with your bank as well as a dedicated credit card. This will help organize your expenses and make tax time much easier.

# Chapter Four



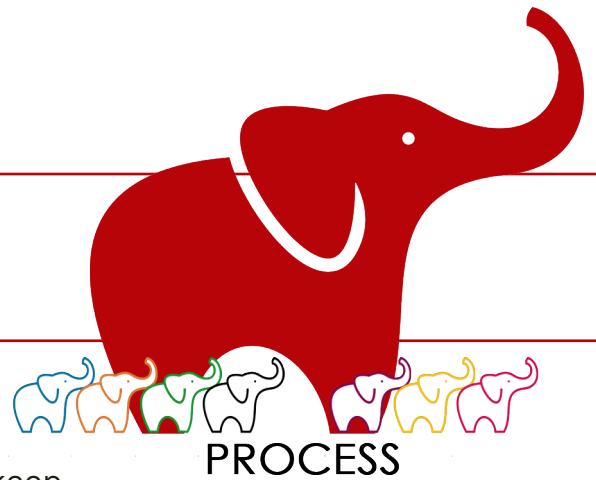
## PROCESS

The pieces that keep you  
moving and growing

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# PROCESS

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First, you've got to attract them. Then you've got to keep track of them. And then their testimonials can help you attract more. Nothing needs to be 100%. Play with your ideas. See what works for you and what others seem to respond to.

## **packages**

**simple. minimal. one thing.**

Your clients need simplicity. They need one door to knock on. You can offer more doors as you build on the relationship, but first, they need to know why **you** and what you will do for them. My advice? Keep it very simple and in a short time frame. If the relationship works, then you can offer the next steps (or the next doors). If you offer all the doors at once, it will lead to confusion, clients will have a difficult time making a decision, and unfortunately, won't even knock.

## **client management**

**keeping track...**

What are the systems you have in place to keep up with your clients? Excel, a CRM system, a good old journal with notes, perhaps? Having the right system, that works for YOU, will serve you as you grow and build. Again, it may not be the perfect fit for the future, but at least it gets you started and thinking about what you might need next.

## **forms**

**intake. surveys. testimonials.**

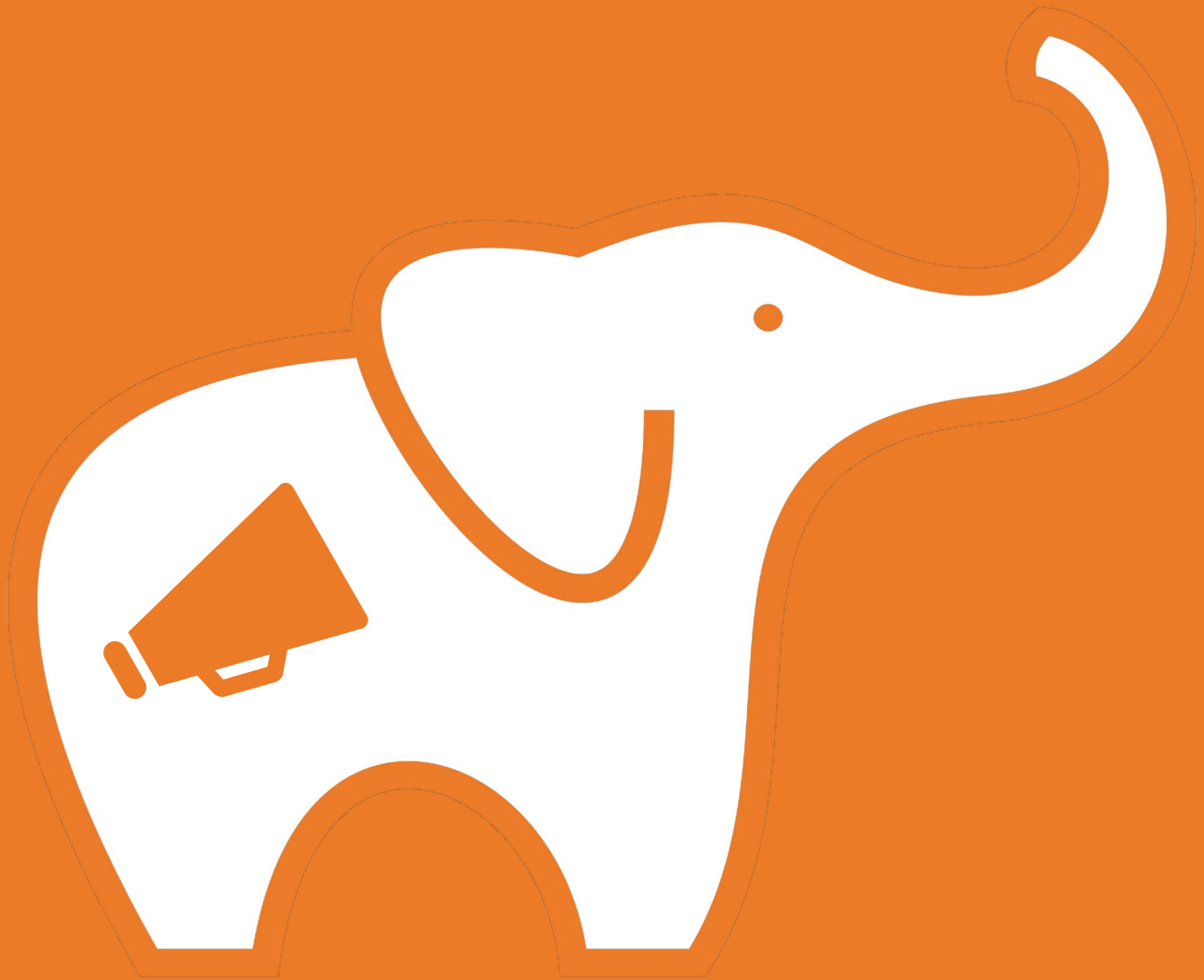
What forms will you need? Intake forms to get background and key info before you work with a client? Surveys to measure results or gain insights? A neat and tidy form to collect testimonials? Quizzes to test knowledge if you're offering a course? My personal preference is to use Google Forms, not only for their flexibility of design but the ability to collect answers in Google Sheets.

## **testimonials**

**ask for them.**

Social proof is a must. Having people you've successfully worked with letting others know why they should work with you is just good marketing. Make it easy for them as well. You can send them questions to answer or interview them and then craft it for them – or even turn it into a video testimonial.

# Chapter *Five*



## MARKETING

Know where you are and  
where you want to go

# MARKETING



I tend to do marketing backwards. When I started out, I spent a lot of money on what I thought I needed. At the end of the day, I changed all of it and essentially threw out thousands of dollars along the way. There are free and inexpensive services to help you while you're growing and figuring it all out. Below are some basics to consider.

## WEBSITE

Do you really need one to start? No, no you do not. Feel free to purchase the domain and create an email with it, but don't feel like you can't start if you don't have a website (see social media below). If you must, create a very simple landing page with very minimal details and a way to contact you. Eventually, you'll want to expand, but it's an evolution. It will never be 100% out of the gate. And websites only help if you know what you're offering, content is king, and a generic page that says what every other site says, won't do you any favors.

Until you have your messaging clear, and your brand (style) identified, a website is an unnecessary expense.

Logo. PowerPoint template. Business Card. Sales brochures. Prioritize what you really need.

**Logo:** Simple is best, even just the right font and your name could do the trick. No need to overthink this.

**Business cards:** I can honestly say, I've made 1000s of cards with varying designs and ended up throwing out 90% of them. For me, having a paper card is no longer necessary – consider a digital one like Mobilo.

Whatever materials you start out with, make sure your visual brand is aligned. People need to recognize you across platforms and materials. Generic photos and a plain design won't help you stand out. Take the time to really plan this piece of your business.

## MATERIALS

# MARKETING



## MESSAGE

Remember when I mentioned in the section on clarity, “know your brand”, well, this is a big piece of that. Most marketing will tell you to figure out who your avatar (your ideal client) is and then message to them with what they want to hear. I couldn’t disagree more.

In coaching and consulting, YOU are your brand and what you have to say is absolutely essential to finding your ideal client. When you speak passionately about what you do and – more importantly – why you do it, the people who need you will find you. They will be like moths to a light. Be their light.

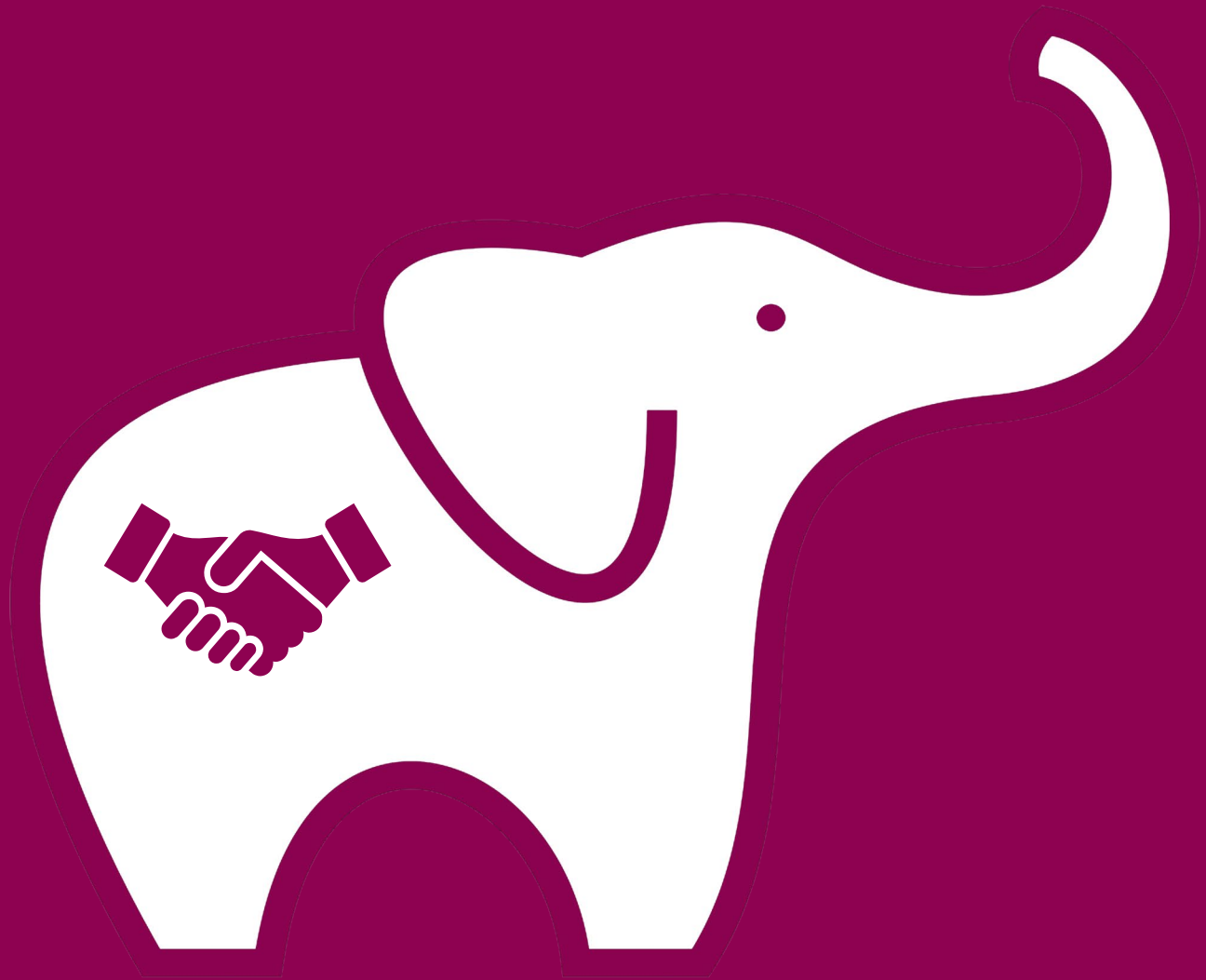
It’s all about Social Media, right? Well, yes and no. Plenty of successful people built their following without setting foot online. However, having at least a basic presence will serve you well in today’s world. Have a solid LinkedIn profile (or Facebook page, or Instagram, etc.) as these will show up first when people search your name. This is another reason your website isn’t really necessary to launch.

## SOCIAL PROFILES

## CLIENT ATTRACTION

Content is King. I’m not a fan of running ads (though it can be helpful in the right circumstances). However, marketing is 80% repetition and 20% content. I believe fully in creating cornerstone content – something I like to call the *TED Talk in your Pocket*. It’s all about creating your central message, your WHY, and then breaking it into bite-size pieces for repurposing and resharing. No fuss, no muss.

# Chapter Six



## CLIENT CONNECTION

The personal touches and the  
communication points

# CLIENT CONNECTION



## CLIENT SUPPORT

Keeping in touch with your clients, and your community, is just one of the ways you can set yourself apart from other coaches and consultants.

People love to be recognized and remembered, even if in a small way. And showing up in a consistent fashion will go a long way in creating a loyal base.

### *email*

How will you handle email?  
Do you need a funnel for your program?  
A list is definitely a must – one you have segmented and added tags to is even better. This way you can send the information someone wants without bothering those who don't.  
Emails are great for onboarding.  
Use templates when you have to send a similar email on a frequent basis. You can still personalize it, but at least you don't start from scratch everytime.

Believe it or not, sometimes a phone call or good ol' snail mail is the way to go. When possible, reaching out "just because" can have a big impact. Sending a holiday card or a personal thank you when someone has hired you, can show they're not just another client. Create those moments in a more meaningful way.

### *old school*

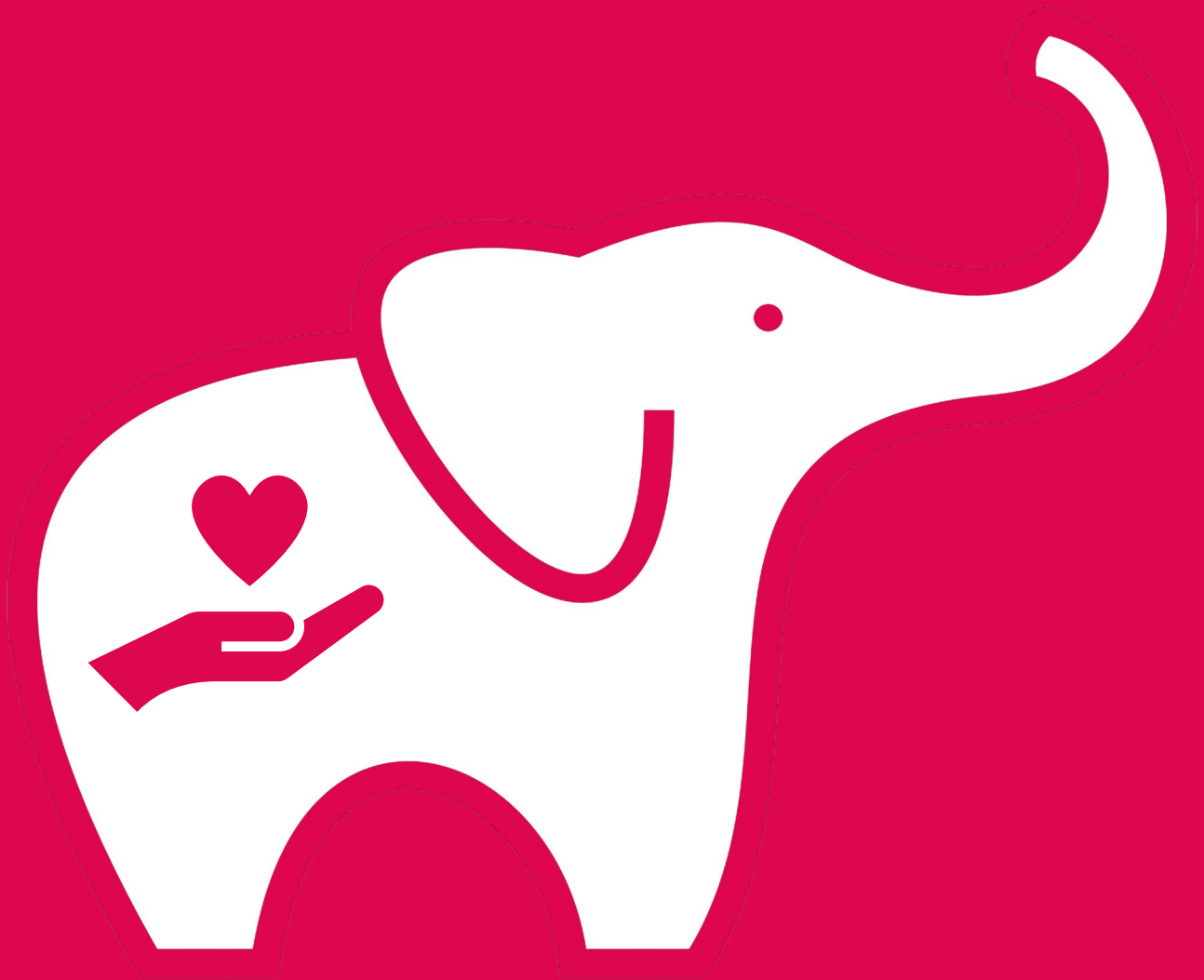
### *digital platforms*

How will you keep your people together and give them space to not only communicate with you, but with others? Having groups, using cell phone apps, perhaps a space like Slack or Discord, are all ways in which you can keep in touch with your community. Depending on what you hope to accomplish, you may need one space or multiple spaces.  
Also, if you plan on running any kind of virtual meetings or webinars, consider something like Zoom.

How will you recognize your clients personally?  
Do they love chocolate? Send them a chocolate bar in the mail.  
Is it their birthday? Send a card, a message, maybe even a personal call. Find out what they love and be sure to find a way to use that when they successfully achieve a goal or celebrate a personal milestone like a birthday, anniversary, or birth of a child/grandchild.

### *personal touch*

# Chapter Seven



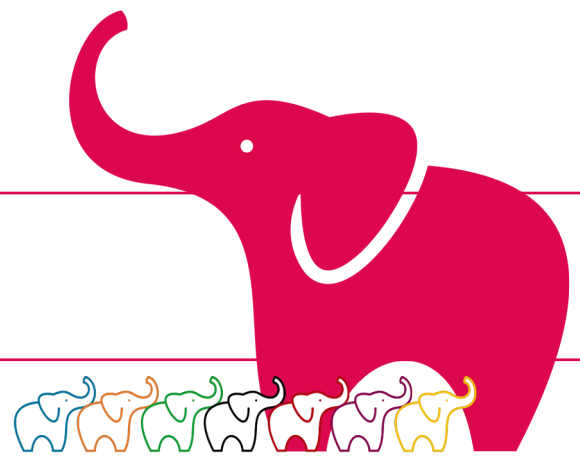
## SELF-CARE

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

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# SELF-CARE

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Without you, your business goes nowhere, so taking care of YOU is a big piece of your success. Prioritize your well-being, and don't forget to sprinkle in a healthy dose of fun and laughter along the way. The better you are, the better your business will be.

**SELF-CARE**

## **take YOU time**

*it isn't self-ish, it's smart*

Look, I get it. You're a busy entrepreneur hustling around the clock. But guess what? You need some "me" time too! Schedule regular moments to unwind, whether it's reading a book, going for a walk, or binge-watching your favorite guilty pleasure show. Give yourself permission to recharge those batteries and remember that even superheroes need a break.

## **sweat out the stress**

**Never underestimate the power of exercise**

Not only does it make you feel like a champ, but it also helps you kick stress to the curb. Find a physical activity you enjoy, whether it's hitting the gym, dancing like nobody's watching, or challenging your dog to a game of fetch. Get those endorphins flowing and let the stress melt away.

## **feed your body and your soul**

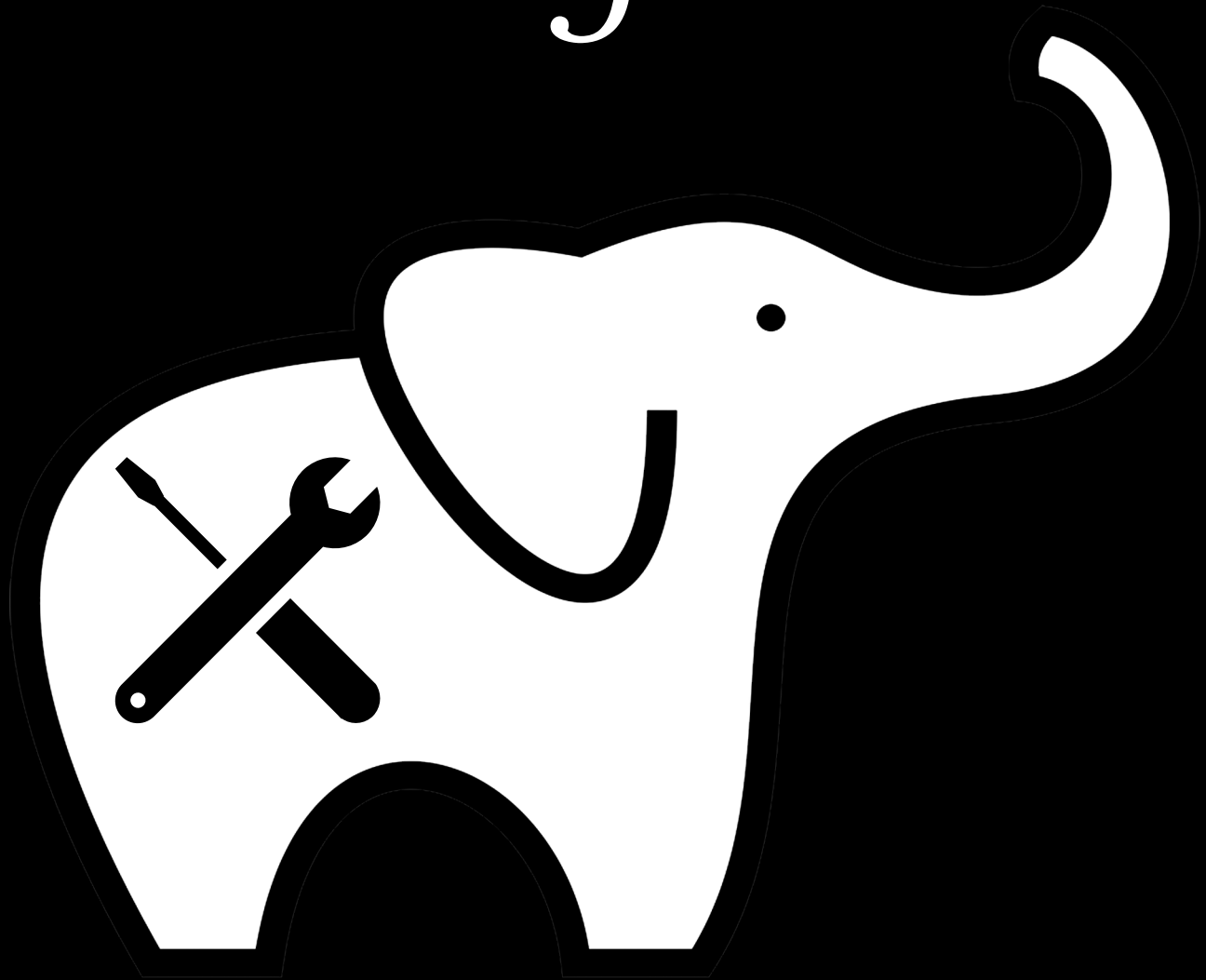
It's tempting to rely on a steady diet of coffee and takeout. But hey, your body is a temple (a very cool and quirky temple, might I add). Treat it right by nourishing yourself with healthy and delicious meals. And while you're at it, a little meditation can help you focus, cut the stress, and boost creativity. Starting your day with a positive mantra or affirmation can't hurt either. \

## **laughter is the best medicine**

**laugh, giggle, and embrace the funny**

Don't forget to inject some humor into your life. Surround yourself with people who make you laugh, indulge in funny memes or videos, or even try a stand-up comedy class. A little self-deprecating humor can ease the tension as well. Mistakes happen, laugh, at least, at some of them! Life is too short to be serious all the time. This work should bring you joy, and when it doesn't bring some joy to the job.

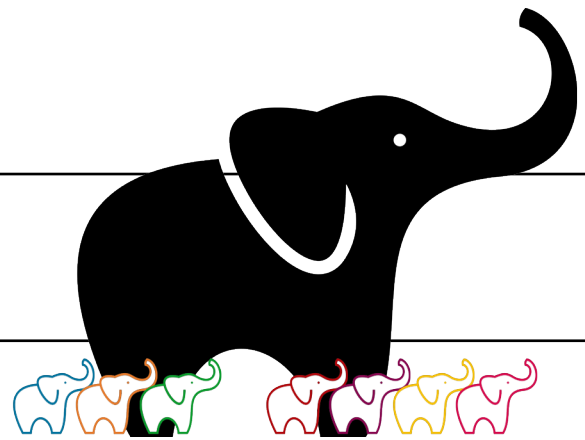
# Chapter *Eight*



## TOOLS

A few options to get you  
started at the lowest cost

# TOOLS



## TOOLS

This a brief list of tools which will get you started. Personally, I do what I can at the FREE level and then upgrade as needed. You can certainly spend more, but until you really know what you need, I would avoid the \$99+/mo memberships and services. Spend the money when you are sure of what you need. There are no affiliate links here, just suggestions to get you up and running.

### EMAIL

<http://mailchimp.com>

This is my go-to for creating my email lists, sign-up forms and automated emails. You can easily last on the free level for quite some time.

### PAYMENTS

<http://paypal.com>

Business accounts get a debit card, cash back, and can accept all credit cards. Stripe is another option, though not as intuitive IMHO.

### SCHEDULING

<http://calendly.com>

While the free level will work to start, I highly recommend the Essentials or Professional level for greater flexibility and options.

### CRM

<http://hubspot.com>

Hubspot offers a great FREE package to manage your Customer Relationships. A great place to start 'til you know what you need.

### ONLINE MEETINGS

<http://zoom.us>

Being able to meet virtually is a must these days. Zoom offers amazing benefits, especially at the Pro Level for just \$15 a month.

### COMMUNICATION

Though not a must, it's great to offer clients options for communicating with you such as Voxer or WhatsApp. You can even set up a business account.



# Are you ready to step into your own spotlight and shine?

*Take the next step...*

As a thank you for being among the first 100 to purchase this book, I'm gifting you a FREE SESSION (\$75 value). Let's have a chat. Tell me where you're stuck, and where you want to go, and then let's find the best path to start moving you forward.

If you have taken the CliftonStrengths Assessment, that will give some extra clues for creating your best course of action. If you haven't that's OK, we can take care of that.

*Pricing Transparency: If we work together, you can expect prices between \$149 for one coaching session and \$899 for the initial Language of You Branding Course. Considerations are given for those who need payment options or scholarships. Money should never be the reason you say no.*

**SCHEDULE YOUR SPOT**

<https://calendly.com/joself/8-elephants-30>

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