Client Management Checklist for Crown Budget Coaching

Note: Coach Responsibilities are in **bold**

- ☐ Receive an email from your team leader assigning a new client for coaching

- ☐ **Respond with an email to your team leader to confirm acceptance of the client in 24 hours**
  - ✓ **Please do not send your client any login details for Edvance system yet.**

- ☐ **Contact the client for a brief Introduction call**
  - ✓ The purpose is to introduce yourself and set the Getting Started meeting date.
  - ✓ During this call, please be sure, as best as you can, that they know it is a seven-session course to be completed online.
  - ✓ Give them "permission" to let you know now if this is too big of a commitment for them. We want to be confidnt that they have "buy in" before we give them "a place at the table".

- ☐ **Email the Client the *Commitment to Coaching Form*** (first signed by coach)
  - ✓ Ask them to sign the form and send it back to you (attached).

- ☐ **Put your new client details into the BC Management Smartsheet (CRITICAL step for the Coach).**
  - ✓ **Mark status as Getting Started. CRITICAL NOTE:** Your client's course will not be created in Edvance until we receive this notification.)
  - ✓ There is an upload area here for the commitment form if you have received it.

- ☐ (HQ) Crown will be notified (via the Smartsheet submission) that the Getting Started meeting has been scheduled.
  - ✓ (HQ) Crown creates the Client course for the Client in their respective Coach's Edvance system.
  - ✓ HQ will notify you with an email (Cc-ing your Team Leader) with the login details of the client for the Edvance system

- ☐ **Complete the BC_LMS Client Tracker Smartsheet any time a client's status has changed.** Options include:
  - ✓ Getting Started Meeting Scheduled
  - ✓ Paused
    1. Client will be unable to work in the course for a few weeks or more for any reason
    2. Client wants to stop indefinitely or all together
    3. Client disengages; you are unable to get a response after 5 touchpoints at any stage of the course
  - ✓ Re-activate: Client has been on pause and is ready to re-engage
  - ✓ Completed: Client completes the 7-week online or in-person coaching course

- ☐ **Encourage the client to write 1 paragraph as a testimony after completed**
  - ✓ Upload in LMS.

- ☐ **Use the BC Management Smartsheet to alert us regarding status changes with yourself as well. (Also let your Team Leader know.)** Put your name for both the Coach and the Client name fields when changing your Coach Status. Notify us if:
  - ✓ You have no active clients at any given time.
  - ✓ You are ready for a new client, including if you are willing to take more than one client.
  - ✓ You want to go on pause for a period of time when you will not be actively engaging with clients.

*LMS - Learning Management System
**Alumni status: Alumni Coaches and Clients can view material (text and video) and can download documents. They cannot upload documents or answer questions within the system. Alumni Coaches cannot give feedback/comments to their clients.

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