

Client Management Checklist for Crown Budget Coaching

Note: Coach Responsibilities are in **bold**

- Alert Crown via the [BC Management Smartsheet](#) whenever you are ready to take on a new client.
- Receive an email from an Administrative Assistant of Coaching and Assessments assigning you a new client for coaching.
- Respond to that email 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 confident that they have “buy in” before we give them “a place at the table”.
- Crown will email the Client and the Coach an E-signature form with the **Commitment to Coaching Form**.
 - ✓ You will receive a copy when both signatures are completed. We recommend you keep this document in your files.
- 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 to Coaching form once 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 your 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, along with a reminder to send them the Guide for Budget Coaching Clients for Edvance360. *Be sure you have the most recent guide from the Resources Repository.*
- 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
 - ✓ There is a space for this in *Session 5: Legacy*.
 - ✓ If you can, please put this *My Story* in a Word Document and upload it to the BC Management Smartsheet when you alert us that the client has completed the course.
 - ✓ The Client has the option to request the video links from the course. Be sure they understand that these videos are intellectual property of Crown. They you have access to them because they paid for the Budget Coaching course. They should **not share these links** with others without specific permission from Crown Financial Ministries, and should **never charge** for video viewing. They can contact you, as their Coach, to request permission, or use the *Contact Us* section of the [main website](#). They should be prepared to tell us which videos they want to share, their audience size, and their purpose. If they contact you, pass the request on to the Administrative Assistant of Coaching and Assessments who assigned the client to you and await a response before releasing the document.
- Use the [BC Management Smartsheet](#) to alert us regarding status changes with yourself as a coach. (Also let your Team Leader know.) 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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