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 (AA) 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.**

- ☐ **Set up your Introductory Meeting**
  - ✓ The purpose is to introduce yourself and set the Getting Started meeting date and homework.
  - ✓ During this meeting, please be sure to communicate that this is a seven-lesson course to be completed online with several hours of homework required each week.
  - ✓ 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".
  - ✓ Notify them that they should download any information they want to save to their computer. After they have completed the course, they will not have access to the materials. They can request links for the Dig Deeper videos, which are not downloadable from the Edvance site.
  - ✓ If you prefer to email your client to set a time for your Introductory Meeting, you may use the email template provided in the Appendix. You are not required to follow the exact content of this template. Make your communication personal while communicating all the necessary information.

- ☐ The AA will send a link to the coach and the client containing an electronic *Commitment to Coaching Form.*
  - ✓ **Both coach and client will sign electronically.** After all signatures are completed, an electronic copy of the signed document will be generated and sent to both.
  - ✓ **The coach should retain a copy of the *Commitment to Coaching Form* with their client records**.

- ☐ **Put your new client details into the BC Management Smartsheet (CRITICAL step for the Coach).**
  - ✓ **Mark status as *Getting Started Meeting Scheduled*. CRITICAL NOTE:** Your client's course will not be created in Edvance until we receive this notification.)

- ☐ The AA will be notified (via the Smartsheet submission) that the *Getting Started* meeting has been scheduled.
  - ✓ The AA creates the Client course for the Client in their respective Coach's Edvance system.
  - ✓ The AA 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 Edvance360 Guide.
  - ✓ **The coach emails the client with the login information and attaches the "Guide for Budget Coaching Clients for Edvance360" document. *Be sure you have the most recent guide from the Resources Repository*.**

- ☐ **Complete the BC Client Tracker Smartsheet any time a client's status has changed.** Options include:
  - ✓ Getting Started Meeting Scheduled
  - ✓ Paused. Reasons for this may include:
    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
  - ✓ Finished. Client has completed the coaching course

- ☐ **If your Team Leader is using the Coaching Client Tracker as a means of communication between the two of you, update this Google Doc as your client works through the**

course. This includes each time a meeting is scheduled or re-scheduled. Adding a brief summary note can help your Team Leader know how to pray for you and your client. If you are unsure if your Team Leader is utilizing this, please reach out to him/her regarding this.

- ☐ **Encourage the client to complete the My Story / Testimony assignment in the Legacy lesson.**
  - ✓ If the client gives you permission to share, copy and paste their story in the Notes section of the BC Management Smartsheet (or upload a Word document) along with your notification that they have finished the course. (See the following step.) No need to worry about formatting.
  - ✓ Please give feedback on this assignment, as you do on all others. It is your "last hoorah" to encourage them to remain on the path of faithful financial stewardship.

- ☐ **Use the BC Management Smartsheet when the client completes the course.**
  - ✓ Choose the Status "Finished". Doing this alerts the AA to generate the client's Certificate of Completion which will be emailed to you, for you to email your client.
    NOTE: After the client has completed the course, their account will be removed after 60 days. The coach should inform the client of this, show them how to download copies of their Assignments, tools, notes, etc. if they have not already done so. (There is a reminder at the end of each lesson for them to save anything they want access to.)

- ☐ **Find out if your client wants future access to the Dig Deeper videos.**
  - ✓ The Client has the option to request the video links from the course.
  - ✓ A document with these video links is in the Resources Repository course on Edvance360. Download the document and email it to the client.
  - ✓ Be sure the client understands that these videos are intellectual property of Crown. They 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.
  - ✓ If they want to use the videos beyond personal viewing, they can contact you, as their Coach, to request permission. Alternatively, they can, use the Contact Us section of the main website or email customercare@crown.org. 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 AA via the BC Management Smartsheet and await a response before releasing the document.

- ☐ **Notify your Team Leader and use the BC Management Smartsheet to alert us regarding changes to your own status, such as:**
  - ✓ 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.
    (Note: when notifying us of your status, you should leave the Client Name and Client email fields blank; they are not required fields.)

*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.

Contact Information:

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