

YOUR PATHWAY TO A THRIVING EXECUTIVE FUNCTION SKILLS COACHING PRACTICE

A coaching journey for professionals
by Beth Peterson

BETH PETERSON INC. AND SOUND ACADEMIC COACHING



EQUIPPING YOU FOR EF COACHING SUCCESS

Launch

Establish a distinct and ethical coaching business

Operate

Implement robust frameworks and practical tools

Scale

Strategically grow and sustain your practice

TEN MODULES

Module 1:
Foundations & Boundaries

Module 2:
Business & Legal Architecture

Module 3:
Your Signature Methodology

Module 4:
Client Intake Process

Module 5:
Operational Efficiency & Technology

Module 6:
Client Agreements & Policies

Module 7:
Marketing Strategies

Module 8:
Sales, Enrollment & Onboarding

Module 9:
Scaling Your Practice

Module 10:
Sustaining Success

MODULE 1: FOUNDATIONS & BOUNDARIES

Coaching vs. Therapy

Defining EF Coaching

Ethical Boundaries

**Distinguishing therapy
clients or students from
coaching clients**

**Niche & ideal coaching
client**

**Unique Value Proposition
(UVP)**

MODULE 2: BUSINESS & LEGAL ARCHITECTURE

Choosing proper
business entity

Understanding
contracts,
liability
insurance, and
intellectual
property rights

Understanding
state and local
compliance

Financial
planning and
bookkeeping

MODULE 3: YOUR SIGNATURE METHODOLOGY

Deep Dive into the
"Sound Academic
Coaching" Model

Core Executive
Function Strategies
& Techniques

Adapting Your
Professional
Experience to
Coaching

MODULE 4: CLIENT INTAKE PROCESS

Comprehensive Coaching Intake Process

Informal EF Assessment Strategies

Collaborative Goal Setting

Setting Expectations & Agreement Framework

MODULE 5: OPERATIONAL EFFICIENCY & TECHNOLOGY STACK

**Client
Relationship
Management
(CRM) for Coaches**

**Scheduling &
Communication
Tools**

**Virtual Coaching
Setup**

**Document
Management &
Security**

MODULE 6: PROFESSIONAL CLIENT AGREEMENTS & POLICIES

**Comprehensive
Coaching Services
Agreement**

**Cancellation,
Rescheduling & Payment
Policies**

**Data Privacy &
Confidentiality Protocols**

**Informed Consent
Refresher (Coaching
Context)**

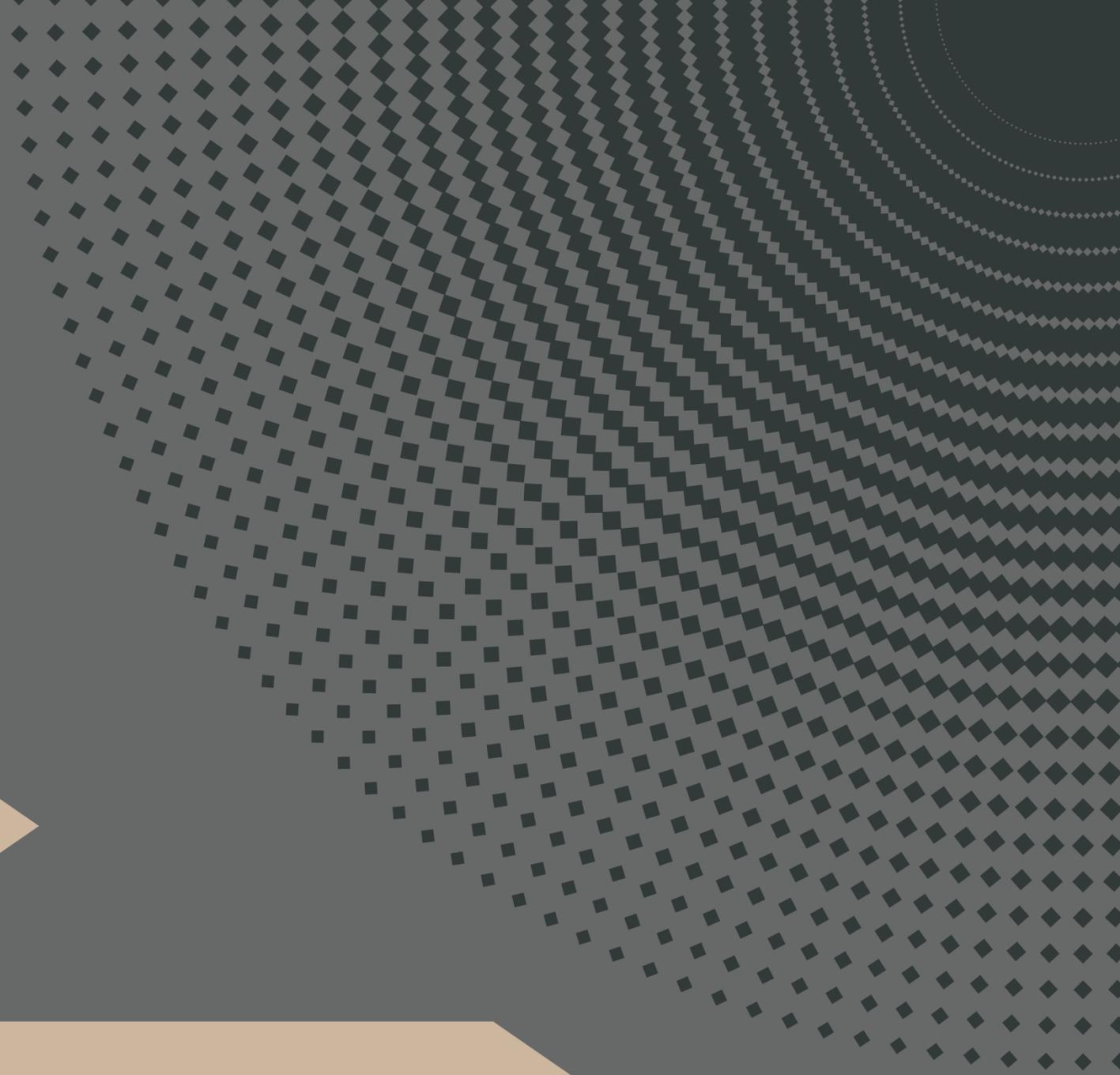
MODULE 7: MARKETING STRATEGIES

**Branding & Messaging
for Coaching**

**Building Your
Online Presence**

**Content Marketing for
Authority**

**Networking &
Referral
Strategies**



MODULE 8: SALES, ENROLLMENT & ONBOARDING

**Conducting
Effective Discovery
Calls**

**Presenting Your
Coaching Offer &
Overcoming
Objections**

**Seamless Client
Onboarding**

**Client Relationship
Management &
Retention**

MODULE 9: SCALING YOUR PRACTICE

**Expanding Your
Service
Offerings**

**Building a Team:
Hiring & Training
Coaches**

**Advanced
Marketing &
Lead
Generation**

**Measuring
Success &
Adapting**

MODULE 10: SUSTAINING SUCCESS

**Continuous
Professional
Development in EF
& Coaching**

**Supervision & Peer
Support for Coaches**

**Self-Care &
Preventing Burnout**

OPTIONS

Tier 1: Self-Guided Course

Includes:

- ✓ Full online course
- ✓ Worksheets, templates, scripts, and legal guides

Ideal For:

Independent learners who want a flexible, budget-friendly option.

Tier 2: Self-Guided + 2 Meetings With Beth

Includes everything in Tier 1, plus:

- ✓ Two 45-minute 1:1 coaching sessions with Beth
 - Session 1: Business setup & professional identity
 - Session 2: Program design, pricing, & client workflow
- ✓ Personalized feedback on business plan
- ✓ Review of intake forms & client workflow

Ideal For:

Students who want accountability and direct professional mentoring.

Tier 3: Full Beth-Led Experience

Includes everything in Tier 1 & 2, plus:

- ✓ Full live cohort taught by Beth (7-10 weeks)
 - ✓ Weekly live sessions
- ✓ Personalized business plan review
- ✓ 30 days of follow-up email support
- ✓ Certificate of completion
- ✓ Invitation to Beth's Coach Alumni Community

Ideal For:

Students who want end-to-end guidance, confidence, and professional-level preparedness.

**PLEASE EMAIL BETH FOR
AVAILABILITY AND PRICING**

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