



Compass Coach Rules of Engagement Checklist

As a Compass Coach, I will consistently practice the following Rules of Engagement:

Utilizing the Compass PDN as a Business and Communications Tool

Create and actively manage a closed PDN group for each of your client groups as soon as you launch your first coaching group.

Promote your PDN client group on every coaching call.

Add participation in your PDN group as a one of your group agreements.

Continue discussion from your coaching calls at your PDN.

Create discussion threads from powerful questions in the Universal guide and powerful questions you asked during your coaching calls.

Track and support client goals in the PDN.

Share audio of your group call recordings (as long as you have permission to record from the group).

Share photos of each other.

Compass Coach Client Care System

Compass Philosophy: Your Compass business is built on creating extraordinary relationships. Your success will be determined by how your clients create results in their lives by utilizing their MAP and their coaching groups. Relationships + Results = Retention. It takes more energy to enroll a new client than to retain a current client.

Within 2 days of receiving a system-generated autoresponder confirming your client's enrollment, send a Compass branded "Welcome" email with "Welcome From Your Compass Coach" in the subject line (template in Coach BackOffice) which includes:

- Days/times of coach's Compass Coaching Groups available for client selection, along with the coach's full contact information;
- Bridge line information and in-person location if applicable.

- Coach indicates that the client can expect a call (within 72 hours):
 - To get better acquainted;
 - To understand the client's objectives;
 - To engage the client in the Compass MAP™ and explain how the group process works.

Below is a simple 3 step follow-up system for new clients.

1) **INSPIRE** your client to get started

ACTION STEP: Call your client within the first week of receiving notification:

- a. Ask them: Which MAP have you chosen this month and have you accessed the audios and workbook?
- b. Ask them: What would you like to gain from your Compass experience?
- c. Ask them: Do you know when your first coach call is and the bridgeline?
- d. Ask them: Have you created your profile on the PDN and joined my client only PDN group?
- e. Ask them: Do you have any other questions for me?

If they have not completed one of the above steps, *SHOW* them how to get started. Show them where to take the Life Assessment, how to access their MAP, and how to choose a coach. Make sure they are ready to start using the product by the end of your call.

2) **EMPOWER** your client by reminding them what they can accomplish

ACTION STEP: Connect with your client after their first group coaching call:

- a. Ask them: How was your first coaching call?
- b. Ask them: What are you discovering about yourself? Have you picked a goal to focus on?
- c. Ask them: How can I best support you in reaching your goals?

If they did not attend their first call, ask them what is stopping them. Remind them why they became a member and how Compass can support them in getting what they want.

3) **CONNECT** with your client on a consistent basis

ACTION STEP: Call your client every 4-8 weeks:

- a. Ask them: What MAP are you listening to this month? How has the MAP helped you in reaching your goals?
- b. Ask them: What are you learning about yourself? Are you satisfied with the progress you are making towards your goals?

Remember, the quality of your client relationships is up to you. You will be much more likely to retain your current clients if they are using the product, and creating results in their lives. Take a stand for your clients; let them know that you care by understanding their needs and taking an active interest in how Compass is changing their lives.