My Coach Office

QUICK START GUIDE

Version 1.0

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Introduction

My Coach Office (MCO) is an online platform for managing your coaching business from anywhere with an Internet connection.

My Coach Office is designed specifically for the solo-coach business owner who wants to live a great lifestyle and run a professional, profitable coaching business online (and yes, this includes you even if you do face-to-face coaching - the days of big client binders are over!).

Because MCO has been designed to be as intuitive as possible, it does not matter if you are great with computers or are a total IT novice. As long as you are willing to try something new, MCO can help you get organized and keep your coaching business in order.

The Purpose of this Guide

The purpose of this guide is to:

1. Demonstrate how My Coach Office empowers you to stay organized in your coaching business.

2. Give insights into how you can easily grow your coaching business to the next level with a few simple tools.

3. Assist you to seamlessly transition your coaching business to My Coach Office.

By reading this guide you will save yourself time. Get your ideas out of your head and down on paper so you can get your business online fast!

In just a few pages we give you:

A clear yet detailed explanation of what you can do with the system.

A few scenarios to help explain the different features.

Worksheets to help you plan and set up your coaching business on My Coach Office.

Additional Help

If you have any questions or would like our expert advice on how you can make the system work best for your coaching business, please contact us using the [MCO Support form](#) which can be accessed from the bottom of every page in MCO.

Please be sure to include your questions, phone number and best times to reach you.

We will answer via email if there is a simple answer. Alternatively, we will call you if that will bring a better outcome.

Getting Started Check-list

It is our aim to help you transition your coaching business to My Coach Office as smoothly as possible. Below is a simple checklist we've developed to help you hit the ground running. You will find details about each step on the following pages.

1. **Configure Your Personal Settings**

2. **Configure Your System Settings**

3. **Review MCO Training Materials**

4. **Create Your Client List**

5. **Define Your Products and Services**

6. **Set-up Courses**

7. **Plan Your Client Resource Library**

8. **Decide if You are Ready for Groups**

Step 1 - Configure Your Personal Settings
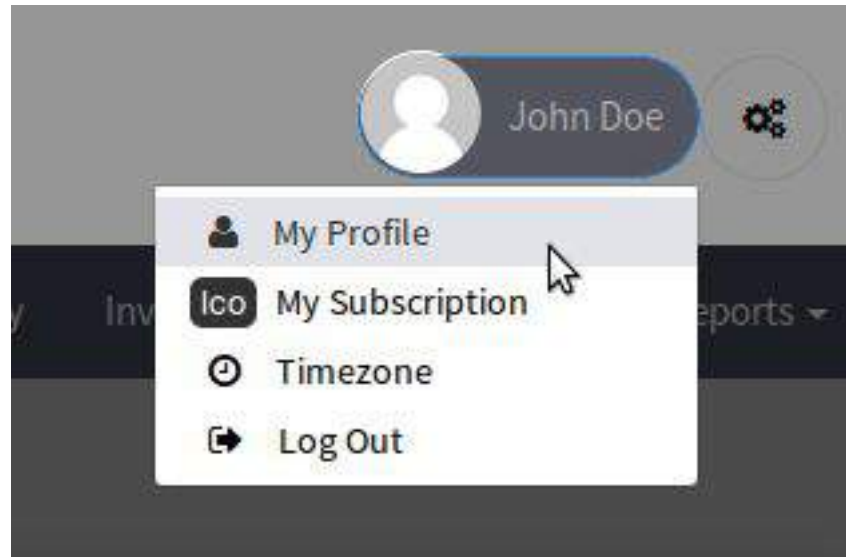
Complete all pertinent information in your profile.

Upload your photo.

Manage your MCO subscription. Not available to Group Coaches in MCO Enterprise.

Ensure your time zone is correct.
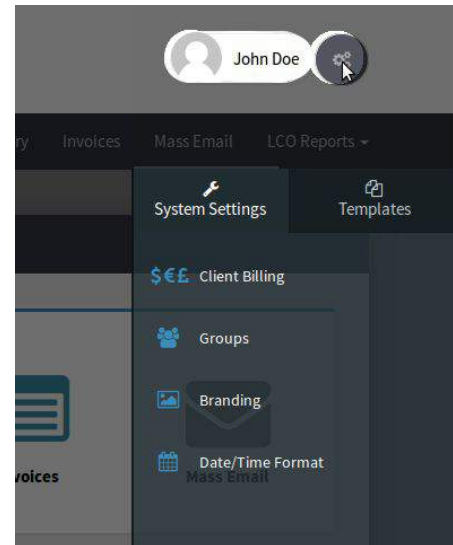
Step 1 - Configure Your Personal Settings

Step 2 - Configure Your MCO System Settings

Input your PayPal account or banking information.

Choose your branding.

Choose your preferred date and time format.

Not available to Group Coaches in MCO Enterprise.

Step 3 - Review the MCO Training Materials

MCO was designed so that even non-techy coaches can jump straight in and get going.

Use **this guide** and **your MCO account** to familiarize yourself with the system (get your first month refunded if you're not 100% satisfied).

Watch the **MCO Tutorials** in order to learn how to use the system effectively. The videos are set up so you can watch them by topic for just a few minutes at a time.

Step 4 - Create Your Client List

Please list all the clients you'd like to add into the system from day one. Your list should include the client's first name, last name and his/her primary email address.

If you have more than 20 clients to add into the system, please let us know. We can save you time by importing your list for you.

See Appendix - there is a worksheet to assist you.

Step 4 - Create Your Client List

Step 5 - Define Your Products and Services

Please list your product names and prices. If you would like to offer online registration to any of your products, please indicate that as well.

You'll also need to write down any tax rates that you would like to include in your invoices (VAT, GST, State Taxes, etc.). You may have as few or as many tax rates as you need for your particular business.

See Appendix - there is a worksheet to assist you.

Step 6 - Set-up Courses

Please list any online videos that you would like to appear in your 'Classroom'.

We highly recommend recording a welcome message that each new client can watch or listen to when they start working with you.

Each Lesson can have a title, a link to a video and a link to any document(s) you would like to display alongside the video (worksheets, workbooks, tests, etc.)

Lessons can be grouped together into 'Courses'.

Eventually you'll upload your videos into YouTube (as unlisted) or Vimeo and link them to My Coach Office.

See Appendix - there is a worksheet to assist you.

Step 7 - Plan Your Client Resource Library

What resources do you regularly share with your clients? This could include eBooks, worksheets, templates, questionnaires, etc.

These can eventually display within the Library area OR in the Important Documents section of an individual client's folder. You will need to consider which approach will work the best for your business. We are happy to review your list and offer advice.

See Appendix - there is a worksheet to assist you.

Step 8 - Decide if You are Ready for Groups

Would you like to give some clients access to some of your Courses and Library Resources but keep others out? Or would you like to enable customers to register online? If yes, please fill out a Groups worksheet (one worksheet per group you'd like to create).

See Appendix - there is a worksheet to assist you.

Overview of Each Area

Not sure where to find something? You can start here.

Your home page in My Coach Office links you to the main areas of the system. This chapter gives you a brief overview and examples of what you can do in each area.

Start Here

Support and Expert Advice

- How to contact our help desk and get a response within 24 hours or less (within business hours).

- Get links to articles and tutorials.

Personal Settings

Manage Your Personal Information

My Profile: Complete all pertinent information in your profile. This will include your mailing and email address, photo, social media pages, website, Skype id and phone number. Anything you want your client to have to be able to be engaged with you.

My Subscription: Use this area to confirm your subscription, set your email that you will use to communicate with and your password. Not available to Group Coaches in MCO Enterprise.

Time Zone: Ensure your time zone is correct. This will ensure that your calendar displays correctly

Log Out: Be sure to log out of the system at the end of each session.

System Settings

Configure MCO How You Like It

Client Billing: Input your PayPal account or banking information here. Later you will come back to set up your prices.

Groups: Creating a Group is a great way to organize things if you have a lot of clients and want to give special access to some but not all of your online material. Your clients can even register online to join a group!

Branding: Upload your logo, choose your background color or image and grab the link to your very own client log in page (with your branding).

Date/Time Format: choose the date and time format that you'd like for your MCO. Everywhere a date/time appears, your format choice will display.

Coaching Journal Templates: Design your own coaching journals and link them to your coaching sessions so you and your clients have an accurate and professional record of the work you've done together.

Meeting Reminder Templates: Configure the emails that get sent to your clients to remind them of upcoming meetings.

System Settings are not available to Group Coaches in MCO Enterprise. Systems Settings in MCO Enterprise are only available to MCO Enterprise Owner.

Calendar

View Coaching Appointments and Client Goals

- Send an invitation to a client or a group.

- Send automated meeting reminders.

- View meeting participants status (attending/ not sure/ not attending).

  Open an invitation and instantly email or Skype your client.

  View due dates for client goals.

  Easily filter your calendar.

  Synchronize with your Google Calendar or export a .csv file of your calendar.

  Drag-and-drop events and goals to reschedule them.

  Set your availability and let clients book meetings.

  View and manage client appointments for multiple coaches (MCO Enterprise).

Calendar

MCO Enterprise Calendar

Coaches

Manage your group coaches (MCO Enterprise)

MCO Enterprise allows you to add a maximum of 10 coaches.

All your group coaches in one place!

- Search for a coach by directly typing their name, or search by the date joined or status.

- Add a new coach with one simple click. Fill in the coach's name and email and your coach will automatically receive an activation email, allowing him or her to log in and fill in the rest of their personal information.

- Onboarding new coaches? Don't worry, reminders are sent automatically.

- Adding new coaches is only available to MCO Enterprise Owner in MCO Enterprise owner.

Sample Coach List

Clients

Manage your coaching clients

All your clients in one place!

· Search for a client by directly typing their name, or search by the date joined or client status.

· Add a new client with one simple click. Fill in the client's name and email and your client will automatically receive an activation email, allowing him or her to log in and fill in the rest of their personal information.

· Forgetful client? Don't worry, reminders are sent automatically.

· Access a client's folder and view their info, lesson plans and files.

Sample Client List
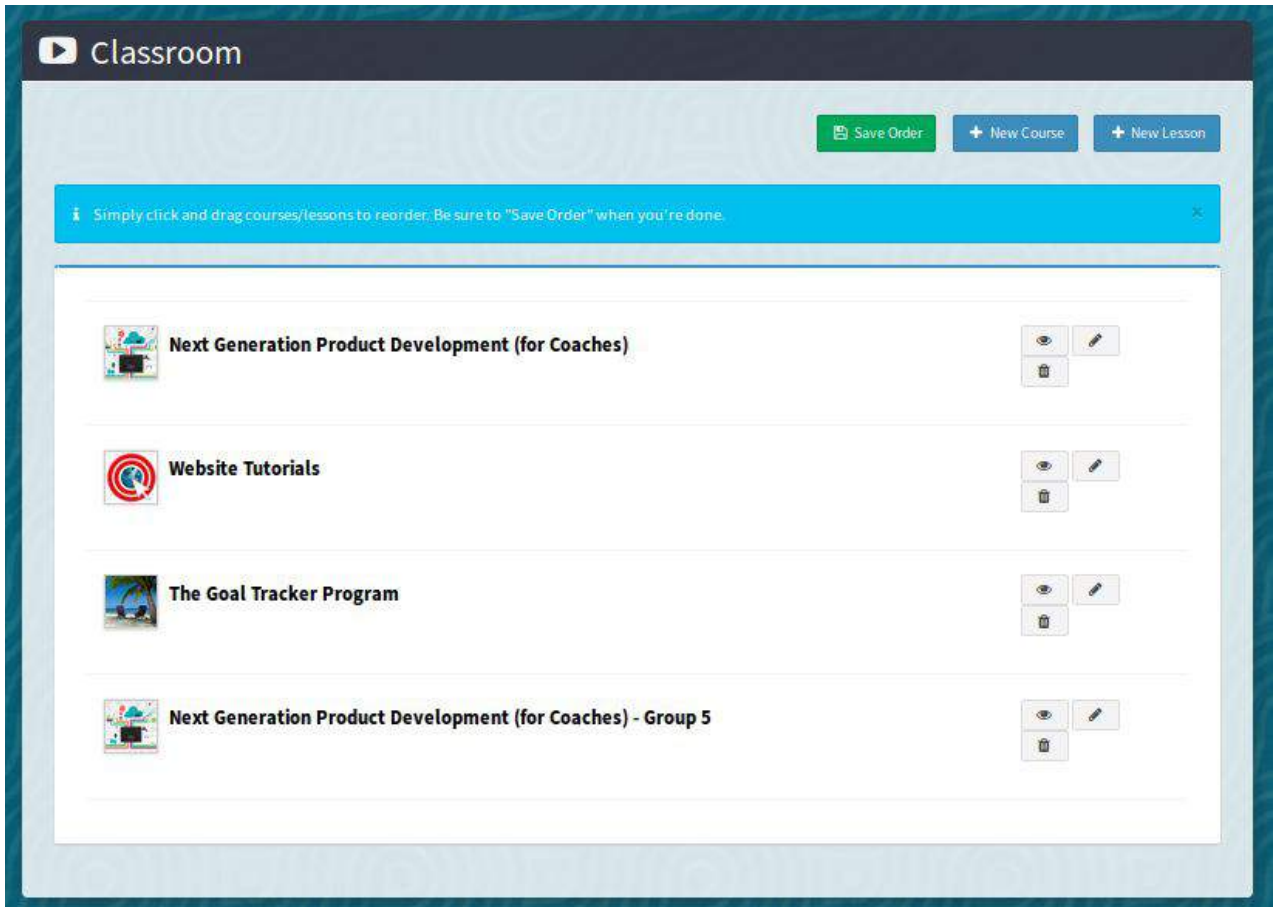

Sample Client Folder

Classroom

Deliver Online Courses

· Upload as many Courses as you like.

· Control which clients get access to each Course.

· It's super easy to add courses and lessons – takes about 2 minutes.

· A lesson consists of a title, a link to a video (from YouTube or Vimeo) and any documents that go with the video, like PowerPoint slides, worksheets, templates, tests, etc.

· We assume that your lessons are your materials or that you have permission to use them.

TIP: Your client can download a worksheet from here, fill it in and then upload it into their private 'Important Documents' area, allowing you to review it.

Alternatively, you can create a custom Coaching Journal Template that goes with the lesson.

Sample Classroom (with 4 courses)

Sample Course (with several lessons)

Sample Lesson

Library

Share your tools and resources with clients

- This is your online resource Library for your coaching clients.

- Control which clients get access to which material.

- Upload as many documents, templates, worksheets, questionnaires, eBooks, audio files as you like.

- We assume that these are your materials or that you have permission to share them.

TIP: Your client can also download these documents, type in his notes, save as a new version and upload it into his private 'Important Documents' area.

Sample Library
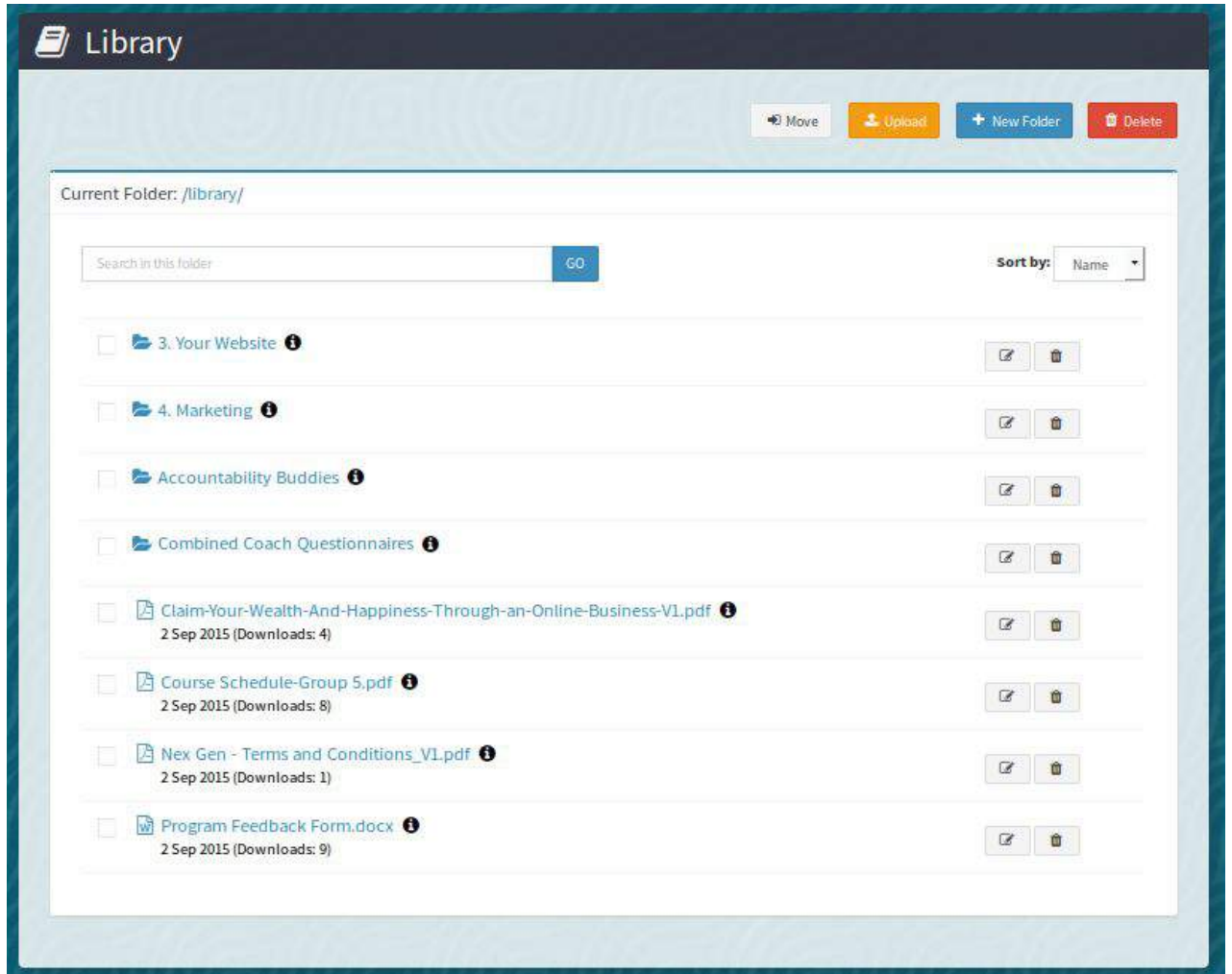
Invoices

- Easily create and send invoices to your clients.

- Not sure if an invoice has been paid? No sweat! You can also track the status of your invoices.

- Invoices are not available to Group Coaches in MCO Enterprise. MCO Enterprise Owner has access to Invoices in MCO Enterprise.

Mass Email

- Email all of your clients who are using the system.

- Email groups.

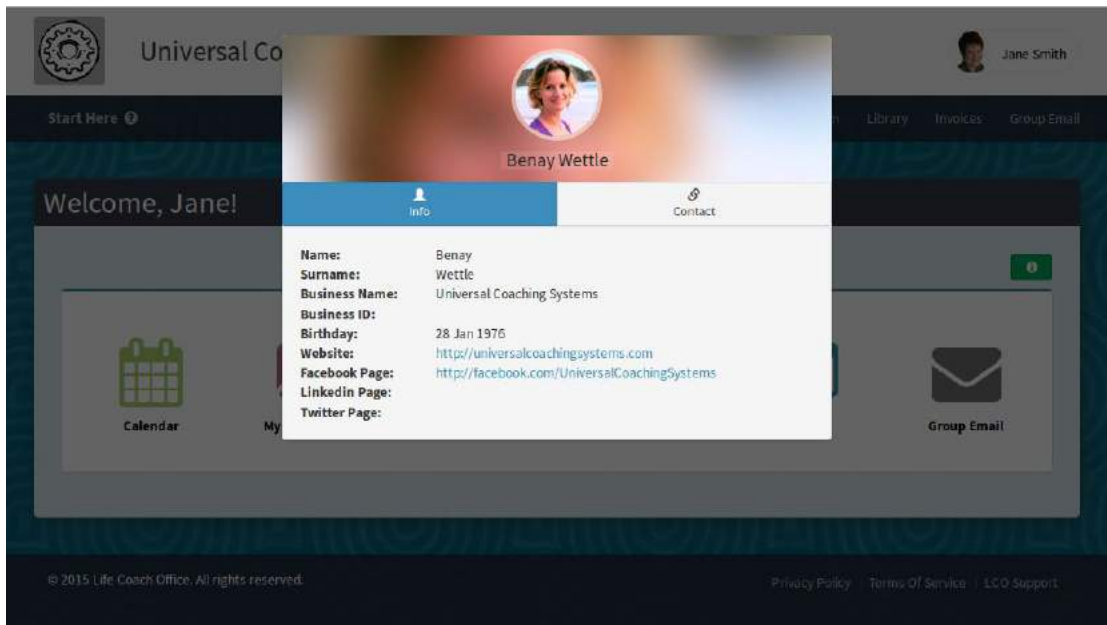- View past Mass Emails.

Reports

- A clean record of your administration and coaching history in one place!

- View coaching quality assurance reports.

- View ICF compliant coaching hours report.

- Export billing and client data.

- If you still prefer your administration on paper, all reports are also printer friendly.

What the Client Sees

Home Page

Coach Details (click the coach's icon)

Calendar

Coaching Journal

Journal Entry (click sections to view journal questions)

Vision and Goals

Important Documents

Classroom

Library

Invoices

Group Email

MCO in Daily Use

Now that you're getting the hang of things, let's get a little more specific and add a completely fictitious client. This will help you to get a sense of how My Coach Office works for your coaching business.

Meet Jane Smith

Meet Jane Smith, your new client. She's a smart, creative woman with big dreams. She works for a middle-sized marketing company and is great at her job, but she wants to go into business for herself. She needs your help to make it through this big transition period.

Jane has turned to you for help. My Coach Office will help you both work together in a transparent, organized and professional manner, and get this new business and Jane's big dream off the ground to a running start!

Getting Jane Started

Once you've added Jane as a client in MCO, she will automatically receive an email, asking her to activate her account and update her personal information (don't worry, she'll get automatic reminders).

Once Jane activates her account her account status will go from "Unverified" to "Active." And, you're off to a great start!

When you want to get into Jane's client folder. Simply go to 'Clients' and click on her name in your client list.

This is Jane's coaching folder:
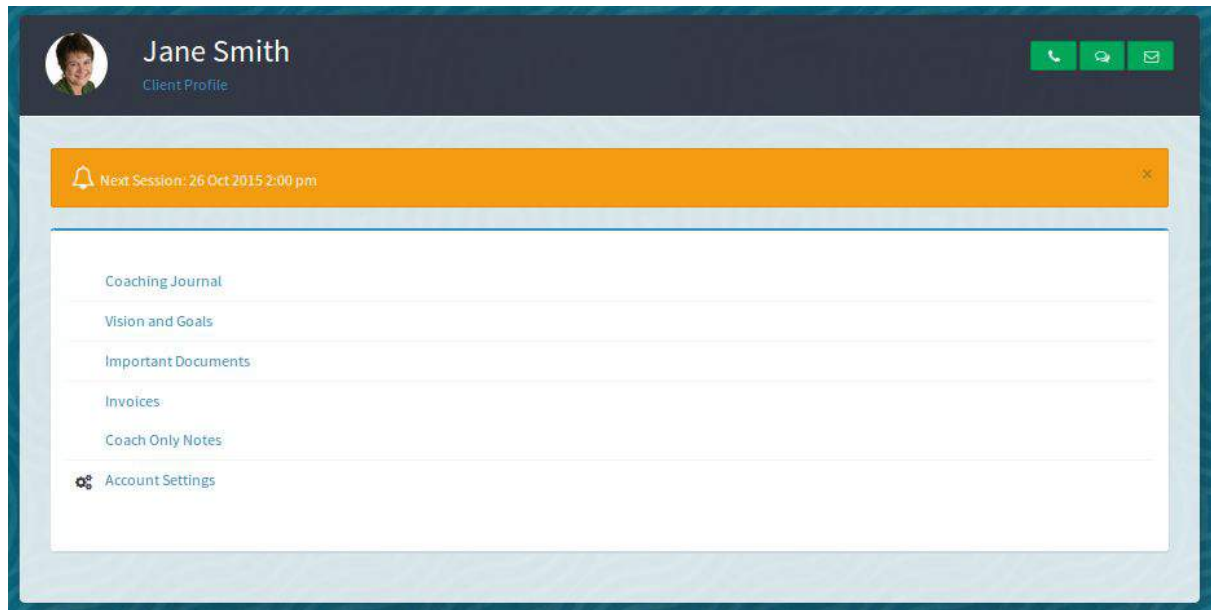
Inside Jane's Client Folder
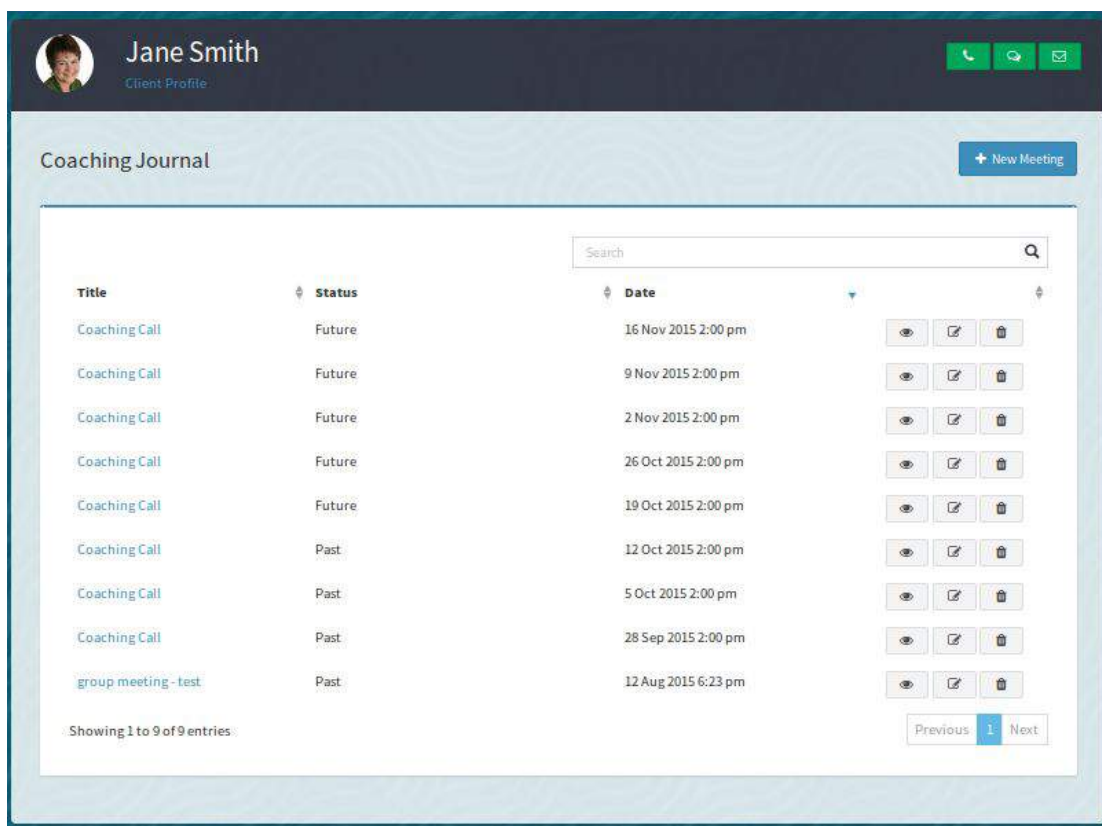
Once you're inside the client's folder you can do the following...

- View and edit Jane's profile.

- Instantly Skype call, Skype message or email.

- View her Coaching Journal.

- View Jane's Vision and Goals (when applicable).

- Add important documents just for Jane to view.

- Quickly access all invoices for Jane.

- Make notes on Jane for your eyes only.

- Modify Jane's Account Settings

Tip: *Make sure Jane sets the right time zone for her account. UTC is the default time zone, but if Jane lives on the other coast or in another country, that will complicate things if the time zone is not set correctly.*

Jane's Coaching Journal

Use this customizable coaching journal to keep notes on your coaching sessions. You and Jane both keep your notes in the same pace (although, Jane can only see the areas you've given her access to).

If you are using the Standard Coaching Journal Template, you'll find that you need less than 10 minutes to get completely up to speed for a coaching session!

More Coaching Journal Facts…

- One Journal entry is automatically created for every coaching session you book in your calendar.

- Each entry includes a predefined set of questions for you and Jane to fill in (so you start standardizing what you capture for each session).

- You can customize your Coaching Journal questions in the System Settings area by clicking on the Templates tab.

- The journal will help you easily record quality assurance information and ICF compliant coaching hour records.

Jane's Vision and Goals

Help Jane get a grasp of what really matters to her by working on her vision and goals for each area of her life. This will help Jane focus on the important stuff and stop doing or delegate the rest.

Goals will automatically display in both of your calendars.

Jane's Important Documents
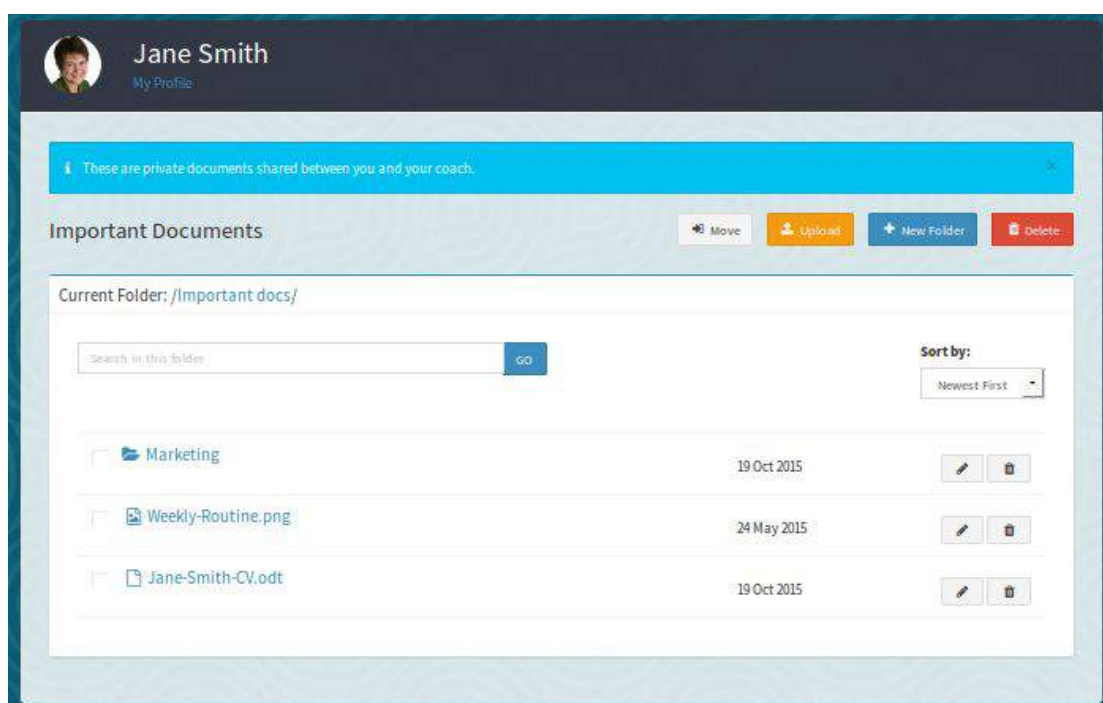
Securely share important files that only the two of you can see.

It's a great way for storing her personal client information, such as a CV/Resume, questionnaires and any written homework you've assigned her.

Jane's Invoices

Gain instant access to all of the invoices you've sent Jane and check if they've been paid.

Your Coach Only Notes about Jane

This is a private place for you to store any notes you may have as you coach Jane.

Jane's Account Settings
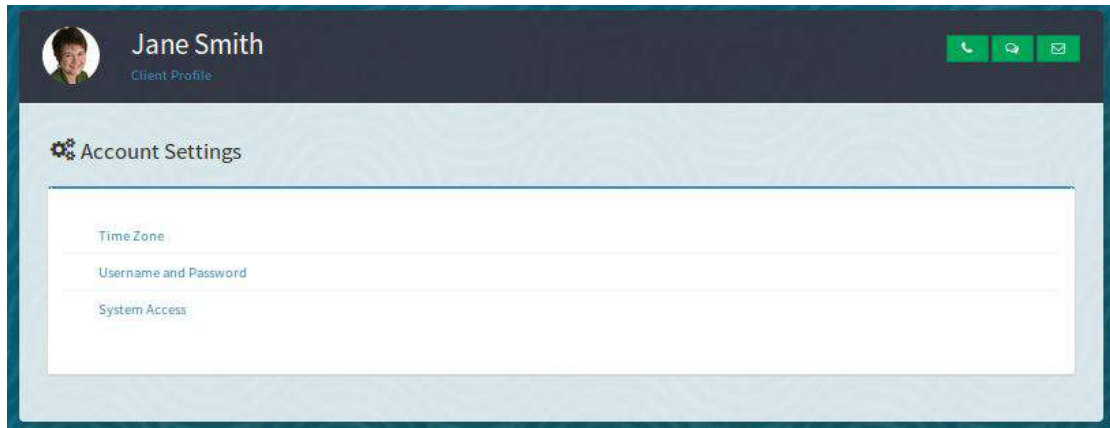
- Check or edit Jane's time zone settings.

- Update her email address and/or password.

- Deactivate her account when you're done coaching.

- Add/remove her from your Groups.

Scheduling Meetings

There are two ways to schedule a meeting:

1) From the Calendar.

2) Directly from your client's folder via the Coaching Journal.

From the Calendar

Let's schedule a meeting through your calendar. Once you click on the calendar tab, the following screen appears:
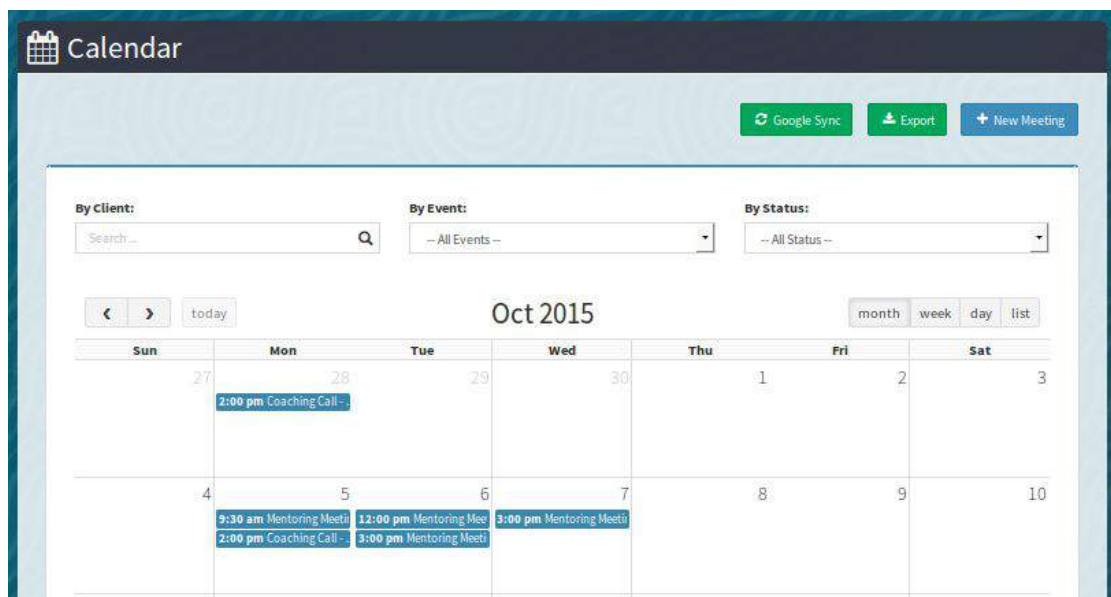
You can view your calendar by month, week, day or a list. If you are using Google, you can sync to your google calendar by directly from this page as well.

Schedule a meeting by clicking on "New Meeting".

New Meeting

You will see that you can choose a group or individual clients. We are creating Jane's first session.

Jane is in another time zone than you are so the system shows you what time the meeting is scheduled for where she is. Very handy!

From there simply fill out the form and save.

When you hit send you will see a snapshot of the meeting request. Once Jane has accepted the meeting it will show as accepted in the bottom of the screen.
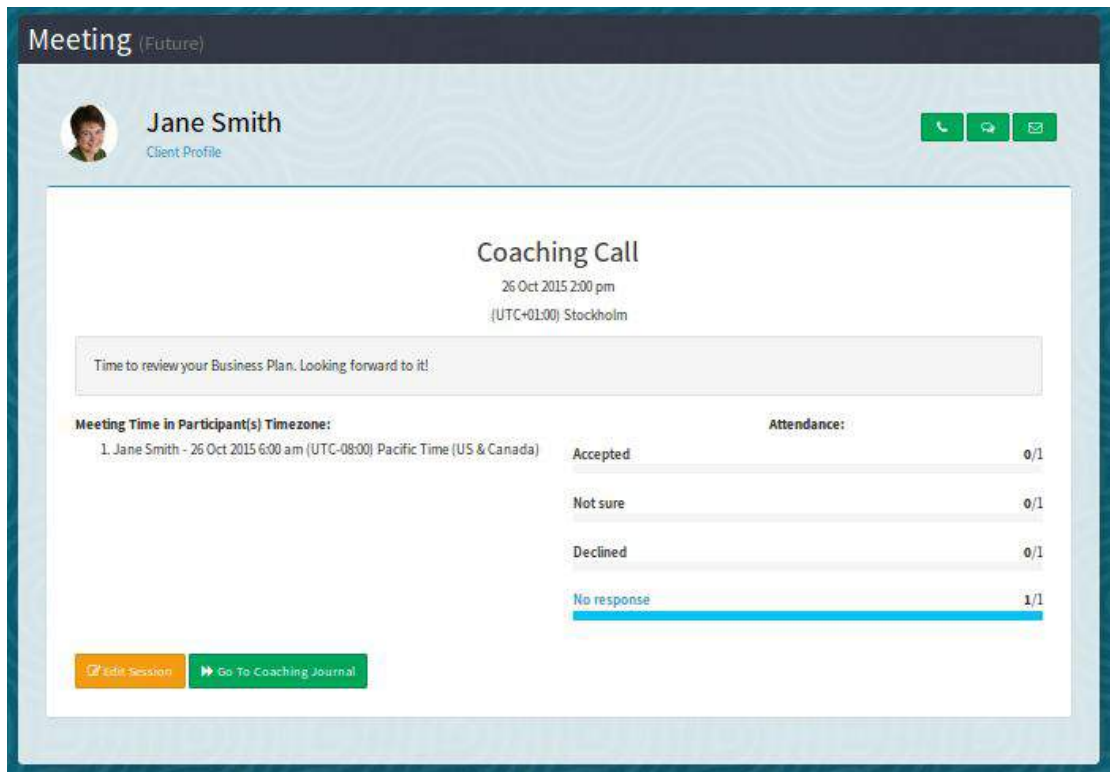
From the Coaching Journal
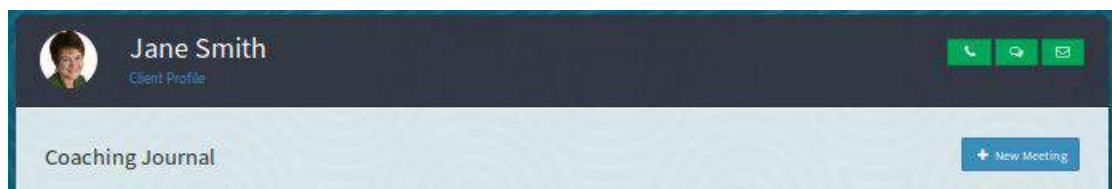
Alternatively, you can create a meeting direct from Jane's Coaching Journal (to save you from having to click to the Calendar every time). Once you click 'New Meeting,' it works exactly the same way as going through the Calendar to setup a meeting.

Preparing for Sessions

Jane will automatically receive an email reminder to fill out her session preparation questions in her Coaching Journal. It helps if you can also encourage your clients to use this tool to help both of you to be prepared for your sessions.

The questions clients are asked to complete in the Standard Coaching Journal Template are...

- What I agreed to do on our last meeting

- What I've accomplished since our last meeting

- What I didn't get done

- What I've learned since our last meeting

- What I've found challenging is

- The opportunities I perceive are

- What I would like to focus on in this session is

- What I agreed to do on our last meeting

- If you want to change the questions you can design your own Coaching Journal templates as well!

By having this information readily available you will be able to get right to the heart of your clients concerns. And get the most from your coaching sessions.

We Love My Coach Office!

My Coach Office is being used by coaches like you all over the world. Here is what just a few of our customers are saying about MCO...

"My Coach Office (MCO) is a Godsend for me. All my coaching files are easily managed from one platform – invoices, meetings, calendar, client journals, and more. MCO sends automatic meeting reminders to my clients, and I get a copy sent to me also.

The technical support staff show a high level of etiquette – always prompt, friendly and thorough.

I am thrilled to be an affiliate for a savvy, brilliant software. Not only am I informing other coaches about an amazing tool to make their business run smoothly, I also receive generous affiliate fees for doing so!"

Verna Lee Bowen
Inspirational Life Coach and Author
All Ways Inspired™

"My Coach Office has opened up huge potential for my coaching business. Now, I can spend LESS time and deliver MORE content to MORE clients."

Chet W. Sisk
International Leadership Development Specialist
Lead The Shift

"I am so excited about My Coach Office!

Not to drop any names or anything like that BUT I like your system 1000% more than Coaches Console, Jig Saw Box or the others I have tried. I'm not knocking them- guess I just need a more visual system to work with.

You have created a 'what you see is what you get' interface that I have been dreaming of in a life coaching client management system. And the fact that it is so affordable makes it the most awesomest (yes that's a word) client management system ever because it's so comprehensive and easy!"

Deaunna Evans, MCC
Master Life Coach and Parent Mentor
Super Moms Coaching

"As the founder of My Coach Office, I can proudly say that I use it everyday in my own coaching business and I love it! My clients are based all over (the US, the EU, Australia and every once in a while NZ and Asia) and I also travel a lot. MCO is the great enabler – it makes it all possible for me."

Benay
Coaching Product Development Expert
Universal Coaching Systems

What's Next

There are plenty more exciting opportunities that come to life once you move your coaching business into My Coach Office. But for now you should have the basics (and a little more) to get started and feel inspired about the next level of your coaching!

So what's next for you?

Depending on where you are, you'll want to do one of three things:

1. Email us with your questions and our fabulous support team (made up of coaches) will get back to you – usually within 24 business hours or less.

2. Try out MCO by setting up an account. If you decide you're not completely in love with MCO within your first 30 days, just send us an email and ask for a refund. We'll take care of it for you with no questions asked.

3. If you got so excited about MCO that you've already registered, please log in and get coaching – welcome aboard, we are super pleased to have you with us!

APPENDIX

Worksheet 1 - Client List

This is the information you need to add a new client into the system manually.

First Name	Last Name	Email Address

Worksheet 2 – Products/Services

This sheet can be used to add all of your products and services into the system at one time.

Product/Service Name	Price	Tax	Tax Rate

Worksheet 2 – Products/Services

Worksheet 3 – Courses

Course Title:		
Lesson Title	**Video link** (Youtube or Vimeo)	**Files** (e.g. ppt slides, notes, exercises)

Worksheet 3 – Courses

Worksheet 4 – Library

Please list all the coaching tools you'd like to share with your clients.

These are coaching resources that you regularly use with your clients

(e.g. your eBooks, worksheets, questionnaires, etc).

HINT: The file name is what your client will see!

Order	File name	All clients can see this	Restrict access to this item
EXAMPLE:	Coaching_Questionnaire.docx		

Worksheet 4 – Library

Worksheet 5 – Important Docs

There may be files that you want to share with one client only. This would be highly personal information about the client like a CV, a completed questionnaire or a detailed personal history.

In this situation, please go to the client's coaching folder and upload the file into their Important Documents area.

Client Name	Order	File name
Sarah Smith	1.	Coaching_Questionnaire_Sarah.docx

Worksheet 5 – Important Docs

Worksheet 6 – Groups

Imagine that you have an eBook and a series of videos that you want to make available only to clients who register for a special coaching course you are running but you don't want any of your regular clients to be able to access this premium content (at least until they pay for the course).

You can do this in *My Coach Office* by setting up Groups!

This questionnaire will help you plan what groups you'll need.

TIP: *Create Groups by going to your systems settings (top right cog icon) and then clicking on 'Groups'.*

Worksheet 6 – Groups

What would you like to name this group?

EXAMPLES: Pathfinder Program - April 2013 OR Leadership Group 4 OR

Kick-Starter

What 'Courses' can members of this group watch?

What 'Library resources' are members of this group able to

download?

EXAMPLES .docx, .xls, .pdf, etc.

Would you like to enable people to register online to join this

group?

Please circle one: YES / NO

If YES…

What will it cost:

How long will member have access to this group:

Which of your existing clients (if any) would you like to add to this group?

TIP: You can manually add a client to a group by going to his/her Coaching Folder and updating their Account Settings, System Access. If you want them to pay simply create an invoice and send it to them.

OR

Clients can add themselves to a group by registering and paying online to join a group.