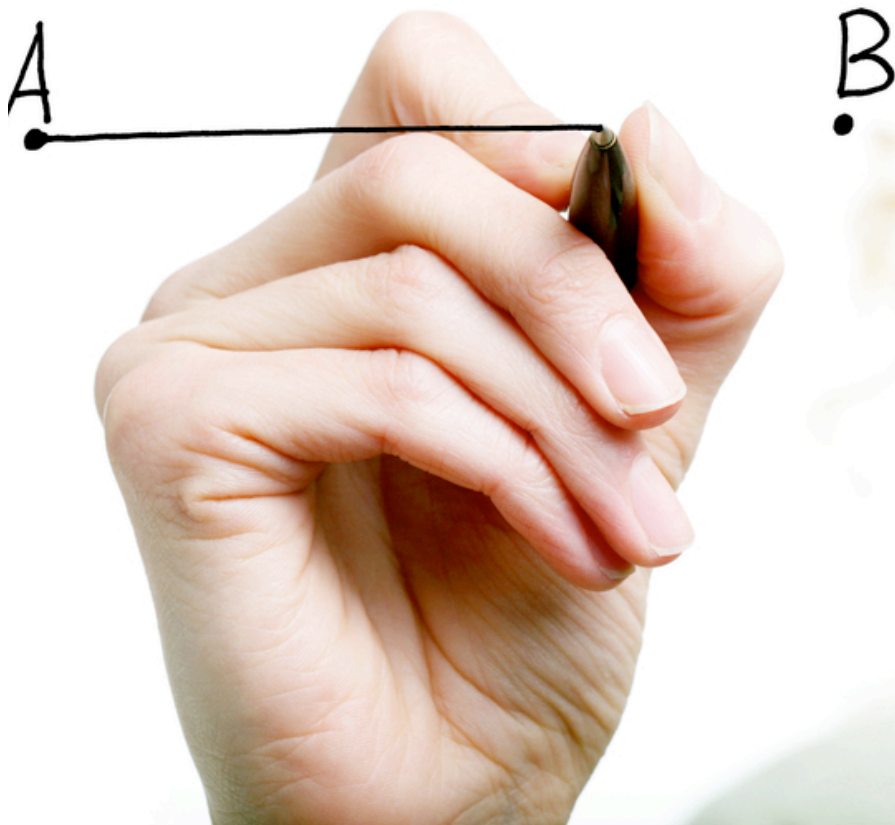


# Successful Coach Gets Back Five Hours a Week with Delegate



## A Client Case Study

### Client: Energy Coach

Kim White  
Vienna, Austria  
Kim's Kolbe: 3657

#### Big Wins:

- 1 FREED UP 5 HOURS PER WEEK
- 2 IMPROVED CLIENT SUPPORT
- 3 DOCUMENTED, OPTIMIZED & AUTOMATED PROCESSES

## Executive Summary

- High-Impact Coach has reached capacity
- Client intake, email and scheduling are restricting his time to operate in his Unique Ability ®
- Strategic Support™ is needed to leverage his time
- Goal is to free up one hour per day
- Requires support with scheduling, systems and processes, email management and pipeline management

Our work with Kim has given him back an extra hour each day. Through our “gatekeeper” approach to supporting his business, he is now operating as part of a proactive, congruent team. Our process-driven work together has removed him from having to manage any pre-meeting activities related to interacting with his clients. With our help, his only responsibility in the process is to simply come to the session prepared to share his talents with clients.

Our unique Strategic Support™ solution worked alongside Kim to cultivate a strong, trusting relationship, which turned into immediate leverage, systemization and business growth for him.

## Client Challenges

Kim was looking to expand his coaching practice significantly, but did not have the operational infrastructure or bandwidth to effectively grow without frustration and overwhelm. Knowing that delegation was the way out, turned to our Strategic Support™ team to support his goals.

- **Reduce email overwhelm:** With multiple email inboxes to manage, it was hard for him to keep on top of communication in a timely manner.
- **Delegate all scheduling:** There were meetings to be rescheduled, and a personal goal to protect his time and adhere to the scheduling concepts he had learned in Strategic Coach®.
- **Systematize administrative tasks:** Related to client management and prospect inquiries. Kim had no real system in place to keep on top of it all because it all lived in his head or on paper.

Kim wanted to shed responsibility for the operational side of his business to free up his energy to focus on his transformational coaching sessions. To do so, Kim needed to “delegate his thinking.”

## Client Results

- **Customized Action Plan:** We developing a delegation strategy to support his vision, needs and goals.
- **Streamlined Processes:** Our Strategic Support Team worked with Kim to “delegate his thinking.” They tackled instant timesavers like streamlining email and calendar. We streamlined inboxes and managed them. Our team provided gatekeeper scheduling to further protect his valuable time and adhere to the Coach scheduling system.

- **Anticipation of Future Needs:** Next, they systematically reviewed existing processes to “delegate his thinking.” First, our team discussed each process with Kim and documented the existing steps. We then built the processes in Asana so that they were both delegatable and efficient. Next, we looked for trends in questions received from clients and further refined the process to anticipate the needs. Our approach to delegating his thinking, coupled with his inherent trust in our process has positioned us to serve as both gatekeeper and lead process improver for Kim’s business; a job he was happy to hand off!

## Results, Return on Investment and Future Plans

Kim has freed up at least one hour per day by enlisting our help. Our team continues to identify, document, template and refine each of his processes. Our team now serves as the gatekeeper to his business and provides operational support to his clients. Our team manages sales lead questions, onboarding support and preps for client meetings. Through the successful experience of “delegating his thinking,” Kim confidently trusts our judgement to manage all client communication. We are now fully integrated into his business and help Kim stay accountable through their weekly meetings.

With key crucial processes in place and delegated, they will now focus on streamlining and improving the sales process, including promoting his new book, [Is Your Money Running On Empty? Seven Steps to Freedom from Financial Stress](#). They also have been working together to capture relevant material to create podcasts for the future.

## Client Testimonial



*Working with Delegate Solutions has helped me evolve from a one-man show and develop a collaborative, effective team. Their experience with delegation and efficiency, along with their personal dedication to my success has helped me free up over 20 hours each month. The structure created gives me freedom to do my best work.* - Kim White

## Technology Utilized:



*Struggling with something similar? Schedule a complimentary Freedom Consult today to learn how we can simply clear your plate! Call: 814.367.3827*

