Business Coaching Toolkit Guide:

30 Coaching Tools & Exercises: When & In What Order To Use Them!
Your Business Coaching Toolkit.
30 Tools: What & When To Use Them!

People have been emailing saying things like, “I love your new business coaching tools, but where do I start?” So, I wrote this article to outline the 30 business coaching tools in our Business Coaching Toolkit, including why, when and in what order to use them. This article was written to help you use our Business Coaching Toolkit more effectively, but is also helpful if you’re a Business Coach looking for a process to follow, if you want to create a Business Coaching Program or perhaps simply want some new business coaching tool ideas for your toolkit!

The Business Coaching Tools Discussed Below Cover 3 Core Areas:

1. Client Intake and Review (4 tools)
2. Making the BUSINESS More Effective (13 tools)
   1. Business Mission and Vision
   2. Reviewing the Current Situation
   3. Business Goal-Setting and Tracking
   4. Problem Solving and Decision-Making
3. Helping the CLIENT be More Effective (13 tools)
   1. Personal Productivity, Priority and Time Management
   2. Personal Effectiveness
   3. Life Balance and Energy

Read on for an overview of the tools, what to use them for and a suggested sequence for the tools.

1. Client Intake and Review Tools

Goal: Settle the client into coaching, get them familiar with you, help them be open to change – and start making mental shifts. And for you to get to know the client with some personal and business background and to agree what the coaching relationship will focus on.

1. Business Coaching – Intake Questions Sheet. One page of business-oriented questions and a second of personal-oriented questions. These gentle, but challenging questions open their mind to coaching and new possibilities. And you get valuable information as to how the client is feeling about themselves and their business – and what they might need help with.
2. Business Coaching – Coaching Goals Sheet. As a coach you MUST ask the client not only to set goals, but to set goals for working with you. When both of you are clear on what the client wants to achieve from coaching, you have a clear focus for the sessions to keep returning to. That doesn’t mean the client’s coaching goals are fixed – they may well get added to or change over time, but it gives you both an essential baseline to work from.
3. Business Coaching – Business History Map Tool. Great exercise to quickly and easily get a background history on your client’s business – and get insight into what most challenges and excites your client.
4. **Business Coaching – Coaching Review Form.** An essential if you want to deliver the best value to your client – this form gives you invaluable feedback and direction for the coaching relationship. Ask your client to complete this quarterly or monthly BUT give it to them during the intake process – then they will be expecting to complete it.

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### 2. Making the BUSINESS More Effective

These tools are divided into 4 broad sections 1) Business Mission and Vision, 2) Reviewing the Current Situation, 3) Business Goal-Setting and Tracking and 4) Problem Solving and Decision-Making.

#### 2.1 Business Mission and Vision Tools

**Goal:** For your client to have a vision for their business so that everything they do in their business will ultimately move them towards their vision. A vision and mission helps us align with a bigger picture, making everything easier from goal-setting, to prioritising actions and day-to-day activities or making tough decisions.

After the intake forms, I recommend doing the business mission and visioning next. A client’s business goals should obviously align with their business vision – what’s most important to them. Then it’s easy to take that overarching vision, translate and break it down into annual and then quarterly goals to move forwards with, tracking those goals AND finally setting and tracking monthly actions.

**NOTE:** Sometimes a client will be resistant to working on visioning and mission statements and/or find it a difficult or lengthy process. If this is the case, you can always do the vision and mission work in parallel to some short-term goal and action-setting.

1. **Business Coaching – Visioning Exercises.** Get your client to connect with the larger vision they have for their business – and what it means for them. Where, ultimately do they see their business heading? This is inspiring for the client AND gives them an excellent framework to work within. Do the visioning BEFORE trying to come up with a mission statement – as the visioning draws out essential elements that feed into the mission statement.
2. **Business Coaching – Mission Statement Generator.** Help your clients define and clearly understand the purpose of their business, as they see it. A great mission statement will define a business and its purpose in under 30 seconds and gives clarity, focus and direction.
3. **Business Coaching – Business Vision into Action.** Make it easy to drive out tangible short-term and long-term goals by helping your clients see what they want over the next 10 years and then work back to what they need to be doing in the next 3 months. **NOTE:** This tool actually overlaps nicely with – and feeds into – the business goal-setting process.
2.2 Reviewing the Current Situation

Goal: Get a clear idea of your client’s business strengths and shortcomings – from as many angles as possible. Use this information to inform goals – and drive the direction the coaching will take.

NOTE: I highly recommend doing these SWOT (Strengths, Weaknesses, Opportunities and Threat) exercises BEFORE setting business goals as these exercises give VITAL information as to how the business is performing. Not only that but the these SWOT exercises highlight areas that need (or would be great) to be included in the goal-setting process. **Allow 2-4 weeks or more to work on this section** as there is a lot of benefit to getting deep into reviewing how the business is really doing.

1. Business Coaching – BUSINESS SWOT Analysis. This coaching exercise is ESSENTIAL to any business coach. Get a really clear idea of what is going well, what is not going so well, what to worry about and what to build on.
2. Business Coaching – Boost Your BUSINESS Strengths Tool. A simple, but powerful exercise to focus on 3 key strengths and identify ways to BOOST them. The opportunity for our greatest growth lies in our strengths...
3. Business Coaching – BUSINESS Weakness Zapper. What are the business’ key weaknesses? What can be done about them? Use this tool’s 5 weakness-zapping strategies to drive out pragmatic solutions and next steps to reduce or eliminate business weaknesses.

Now you have a clear idea of how the business is doing, where it could really move forwards through boosting its strengths and capitalising on opportunities as well as where it needs to deal with weaknesses and threats on the horizon. This is ESSENTIAL input for business goal-setting. In fact after completing these three business coaching tools you may need to revisit the Coaching Goals – what the client wants to focus on while working with you.

2.3 Business Goal-Setting and Tracking Tools

Goal: Get the client setting powerful business goals that align with the company’s mission and vision. Not only that, but ensure that long-term goals map onto day-to-day business activities through annual and quarterly goal-setting – and monthly action setting and tracking.

NOTE: If you’re going straight into goal-setting without having done the Business Visioning and Mission Statement exercises yet, I highly recommend you start the business goal-setting process with the “Business Vision into Action Exercise” (from the 2.1 Business Vision and Mission Section). This business coaching exercise considers where your client wants to be 10 years from now and brings that neatly into what they need to be doing in the next 3 months to achieve that.
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1. Business Coaching – Annual Business Goals Planner. Helps your client identify their Top 10 Goals they want to be working on over the next 12 months – and 3 actions to get started on their Top 3 goals.


4. Business Coaching – Monthly Action Tracker. Tracks up to 25 actions your client may have for the month including who they need to delegate to/support needed.

5. Business Coaching – NAIL that Goal SMART Goal-Setting. Make that business goal SMART as well as identifying obstacles, resources needed, getting clear on goal benefits and much more.

6. Business Coaching – Weekly Success Planner. A holistic overview of your client’s week including priorities, what they need to remember (whether it’s a birthday or a big meeting), obstacles, maintaining focus on quarterly goals. Then page 2 reviews progress and learnings at the end of the week. Use it once for guidance, or get your client to use it on a weekly basis.

2.4 Problem Solving and Decision-Making

1. Business Coaching – Mentor Magic. This final tool under the Business Effectiveness section can be used many times/at any time to help a client find new answers for a problem – or to make a decision.

Now you have a vision and mission statement for the business, annual goals that fit into that bigger picture. Quarterly goals that move you towards the annual goals, and monthly actions that take you to your quarterly goals. For important or bigger or more complex goals you can use the Nail That Goal worksheet, and finally, for everyday use you have the Weekly Success Chart.

3. Helping The CLIENT be More Effective

We all know that you can’t coach someone around their career or business without touching on the personal side of things. The tools in the next section 1) Help your client become more productive at work through better time, priority management and delegation. In addition, essential tools are included to look at 2) Your client’s personal strengths and weaknesses AND 3) Review how they spend their time, reclaim their energy at work and work-life balance.

In terms of sequencing – because these tools have a different (personal) focus – you can use these tools in parallel to the business-focused tools. The Personal Productivity Tools immediately below are a great place to start, gently getting your business client to look at how their behaviour influences the success of their business. If your client is stressed or worn out I recommend looking at the Life Balance and Energy section of tools early on.
3.1 Personal Productivity, Priority and Time Management

**Goal:** Help your client be more productive – and reduce their stress through better time, action and priority management.

These productivity, priority and time management tools can be done in any order. They are ALL incredibly useful for a business owner who is typically trying to manage multiple competing issues and demands on their time. You can start your client on these tools right away.

1. **Business Coaching – Urgent Important Matrix Template.** Probably the best tool to start with in this section to introduce the idea of more effective time management. Shows that planning prevents crises from arising and helps the client identify their own unique time wasters and interruptions.
2. **Business Coaching – Interruptions Blaster.** If your client is always being interrupted (or keeps interrupting themselves) this is a great tool to start with. A powerful awareness raising tool, identifying your client’s unique interrupters with action-setting and an appendix of interruption management tips and techniques.
3. **Business Coaching – Big Rocks Exercise.** Help your client understand the importance of prioritising goals and actions. If we don’t do the “Big Rocks” first, then the sand and pebbles will fill your time and we don’t get what is MOST important done.
4. **Business Coaching – Delegation Identifier.** If your client is trying to do everything themselves, this exercise is a great way to help your client identify – and get excited and inspired about – delegating. What do they hate doing? What do they love? What do they just never seem to get around to?
5. **Business Coaching – Action Priority Matrix Tool.** A super-simple technique to identify quick wins – and avoid painful and unnecessary ‘hard slog’ tasks. Great to get the client completing high impact tasks first!

After completing this set of tools, your client has a great set of time management techniques to practice and apply. And when it comes to reviewing actions and progress with the client, it’s great to refer back to these tools and techniques – whether it’s to acknowledge how much better they are managing their time – or ask what they could do better next time.

3.2 Personal Effectiveness Tools

**Goal:** Help your clients take a long, hard look at their skill-set, where they could use the strengths more effectively and where some help (or change) is needed. You’re coaching the client to make their business more successful but if THEY become more effective, so will their business.
1. **Business Coaching – PERSONAL SWOT Analysis.** As well as working on a business’ strengths and weaknesses, take a look at your client’s strengths and weaknesses: Where is your client sabotaging themselves? Where could they make huge strides forward? How could they bring that into their businesses?

2. **Business Coaching – Boost Your PERSONAL Strengths.** Taking your clients 3 favourite strengths, how could your client use these to be EVEN more successful?

3. **Business Coaching – PERSONAL Weakness Zapper.** Use this tool’s 5 weakness-zapping strategies to drive out pragmatic solutions and next steps to reduce the impact of your client’s weaknesses. This personal weakness zapper tool is great to use in conjunction with the Delegation Identifier (in 3.1 Personal Productivity above).

4. **Business Coaching – Daily Success Habits.** This tool does double duty – setting up daily habits that make your client more effective in managing their time and priorities better – as well as taking better care of themselves so that they have more balance and energy in their lives.

*Tip:* A great angle to take when reviewing these tools with your client is to ask, “How can you bring what you’ve learned about yourself into your business, to make your business even more successful?”

### 3.3 Life Balance and Energy Tools

**Goal:** Help your client find more work-life balance and energy – so that they are happier and more effective.

Business owners are notorious for working long hours. When they’re not WORKING on, or in, their business, they’re travelling to or from work or meetings, networking or thinking about their business. Help them see a bigger picture, create supportive daily habits, enjoy work more and let go of what is not serving them.

1. **Business Coaching – Expose Your Hidden Time Wasters.** This weekly time-recording exercise gives the facts on how your clients are really spending their time. This exercise not only exposes time-WASTERS, but will also help your client see how much time they are spending on work-related activities – and how much on themselves and their loved ones. Is how they’re spending their time in line with their priorities? Are they taking care of themselves? Are they sabotaging themselves? Find out!

2. **Business Coaching – Reclaim Your Energy at Work.** We work for ourselves, we should be happy shouldn’t we? But is your client actually enjoying their work? How much time are they actually feeling happy? Help your clients SEE what percentage of time they are really happy and unhappy at work, identify critical factors for their happiness and pick 3 actions to do something differently. Give them the power of awareness – so they can make a change. A great tool to use in conjunction with the Delegation Identifier (in 3.1 Personal Productivity).

3. **Business Coaching – What Do You Need To Let Go Of?** What is your client holding onto that is dragging them or their business down? WHY are they holding onto it? Whether it’s something in their business or personal lives, letting go will give them an energy boost.
4. **Business Coaching – Business Tolerations (Free).** What is your client tolerating in their business? What is wearing them down and draining their energy? Sometimes, just identifying and making a list is enough to get things moving...

And (EXTRA Recommendation) there is always the **Wheel of Life Template (Free).** If you’re looking to find out how a client feels about their life and how balanced it is, this is one of the best tools there is!

**In Summary:**

There are 30 **business coaching tools** in our Business Coaching Toolkit. This article was written to help you use our Business Coaching Toolkit **more effectively.** But it can also be used for ideas or as an outline for a Business Coaching Process or Programme.

The order above is a **suggested order** to use the tools in – but it’s just a suggestion. It all depends on you and your client – so dance in the moment, have fun and play with it!

So, What Next?

We hope this Coaching Toolkit helps you grow your business and your clients! **Here are some things to do if you liked this guide:**

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And if you have any other questions or suggestions just give me a shout, I'd love to hear from you!