

The AI Toolkit for Coaches & Consultants

45+ Copy-Paste AI Prompts to Attract Clients, Deliver Transformations, and Scale Your Practice — Without Burning Out

From discovery call to testimonial — AI handles the systems so you focus on the coaching.

45+ COPY-PASTE AI PROMPTS ACROSS 10 CHAPTERS

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Table of Contents

Chapter 01 — Attracting & Converting Dream Clients

Chapter 02 — Discovery Calls That Close

Chapter 03 — Onboarding New Clients

Chapter 04 — Delivering Powerful Coaching Sessions

Chapter 05 — Client Results & Accountability Systems

Chapter 06 — Content & Thought Leadership

Chapter 07 — Group Programs & Community Management

Chapter 08 — Pricing, Proposals & Business Finances

Chapter 09 — Business Operations & Systems

Chapter 10 — Scaling Beyond 1-on-1

BONUS: The 15-Minute Weekly Business Review

Appendix: AI Tools for Coaches & Consultants

Why This Toolkit Exists

The coaching industry generates over \$20 billion per year. But 80% of coaches struggle to earn a sustainable income — not because they lack talent, but because no one taught them how to run a business.

The missing piece is rarely more certifications. It's systems.

This toolkit gives you 45+ battle-tested AI prompts that cover every aspect of your coaching practice — from attracting clients and closing discovery calls, to delivering transformational sessions, managing client results, creating content, and scaling beyond 1-on-1.

How to use this book: Don't read it cover to cover. Find the chapter that matches your current challenge. Copy the prompt. Paste it into Claude, ChatGPT, or any AI tool. Edit the brackets. Get your output. Use it immediately.

These prompts have been engineered for specificity. The more detail you add inside the brackets, the better your output. A great prompt is a great brief — treat it that way.

One final note: AI is the accelerant, not the author. Your perspective, your relationships, and your presence are still the product. This toolkit just removes the friction between your expertise and the world seeing it.

Let's build the practice you actually want.

CHAPTER 01

Attracting & Converting Dream Clients

The coaches who fill their programs aren't the most credentialed — they're the clearest. These prompts sharpen your positioning, make your offer undeniable, and turn the right strangers into paying clients on autopilot.

IDEAL CLIENT AVATAR (ICA) DEFINITION

I coach [type of client] who struggle with [core problem]. Help me define my Ideal Client Avatar. Include: (1) Demographic snapshot (age, career, income, life stage), (2) Core frustrations and pain points (what keeps them up at night), (3) Desired transformation (what they desperately want), (4) Objections to hiring a coach (cost, time, skepticism), (5) Where they spend time online, (6) The specific language they use to describe their problem. Make it specific enough to write copy that makes my ICA say "this was written for me."

SIGNATURE OFFER POSITIONING STATEMENT

Help me write a crystal-clear positioning statement for my coaching offer. My offer: [describe your program/service]. My ideal client: [describe who you serve]. The transformation I deliver: [describe the outcome]. Format: "I help [ICA] achieve [transformation] through [your method] — without [common objection or obstacle]." Give me 5 variations, ranked by conversion potential, with a one-line explanation of why each works.

DISCOVERY CALL BOOKING PAGE COPY

Write conversion-optimized copy for my coaching discovery call booking page. My offer: [describe coaching program]. Price range: [investment]. Ideal client: [who you serve]. Include: (1) Attention-grabbing headline focused on transformation, (2) 3-4 bullet points on what we cover on the call, (3) "This call is for you if..." section (3 pain points), (4) "This call is NOT for you if..." (1-2 disqualifiers to increase quality), (5) What happens after the call, (6) Social proof hook, (7) CTA button copy. Tone: confident, warm, direct.

COLD DM OUTREACH FOR COACHES

Write a personalized cold DM to [Name] who I found on [platform — Instagram, LinkedIn, podcast, etc.]. I noticed [specific detail about their content, business, or situation]. I coach [type of client] to [transformation]. The DM must: feel genuinely personal (not templated), lead with value or observation — not a pitch, be under 80 words, end with a low-friction question (not "want to book a call?"). Give me 3 variations.

INSTAGRAM/LINKEDIN BIO REWRITE

Rewrite my coaching bio for [platform]. Current bio: [paste current bio]. My specialty: [niche + transformation]. Ideal client: [who you serve]. Achievements/credentials: [2-3 key facts]. The new bio should: hook with the transformation (not your credentials), make the ICA say "this is for me," include a clear call to action, and stay under [character limit: 150 for IG, 220 for LinkedIn]. Give me 3 versions.

CHAPTER 02

Discovery Calls That Close

A great discovery call isn't a sales pitch — it's a diagnostic. These prompts help you ask the right questions, guide the conversation toward clarity, and make the close feel like a natural next step for both of you.

DISCOVERY CALL QUESTION SEQUENCE

Create a 45-minute discovery call structure for a [type of coaching] coach. Include: (1) Opening rapport and agenda set (5 min), (2) Current situation questions (10 min — 4 questions), (3) Dream outcome questions (10 min — 4 questions), (4) Gap and obstacle questions (10 min — 4 questions), (5) Investment readiness and decision-making questions (5 min — 3 questions), (6) Offer presentation and close (5 min). For each section, write the exact questions plus a brief note on what you are listening for.

OBJECTION HANDLING SCRIPTS

Write conversational scripts to handle the following coaching objections. For each: acknowledge the concern genuinely, reframe it to the real cost of not acting, and guide toward a decision. Objections: (1) "I need to think about it," (2) "It's too expensive right now," (3) "I'm not sure I'm ready," (4) "I need to talk to my spouse/partner," (5) "I've tried coaching before and it didn't work." Keep each script under 100 words. Tone: empathetic, not pushy.

POST-CALL FOLLOW-UP EMAIL

Write a follow-up email to send within 2 hours of a discovery call with [Name]. On the call, they shared: [brief summary of their situation, goal, and hesitation]. We discussed: [what coaching program was presented]. Status: [still thinking / said yes and needs invoice / said no but left door open]. Write the email to: (1) Recap the transformation we discussed (their words, not yours), (2) Remove hesitation with a reframe or resource, (3) Make the next step crystal clear. Max 200 words.

PROPOSAL / PROGRAM OVERVIEW DOCUMENT

Write a professional coaching proposal for [Name] following our discovery call. Their situation: [problem]. Their goal: [desired outcome]. Program: [name, duration, sessions per month, price]. Include: (1) Personalized opening (1 paragraph referencing something from our call), (2) The transformation this program delivers (outcomes, not features), (3) What is included (sessions, support, bonuses), (4) Investment and payment options, (5) What happens when they say yes (next steps), (6) A time-based close (offer expires in X days). Tone: warm, confident, premium.

CHAPTER 03

Onboarding New Clients

The first 48 hours after a client signs sets the tone for the entire engagement. These prompts help you deliver a white-glove welcome that reduces buyer's remorse, builds trust fast, and gets clients showing up ready to do the work.

WELCOME EMAIL (POST-PAYMENT)

Write a warm, energizing welcome email to send to [Name] immediately after they invest in [program name]. Include: (1) Warm congratulations that affirms their decision (not generic), (2) What happens next (intake form, first call booking link, access to resources), (3) One thing they can do RIGHT NOW to get momentum, (4) Your contact info and response time policy, (5) A line that builds anticipation for the work ahead. Tone: warm, confident, premium. Max 300 words.

CLIENT INTAKE QUESTIONNAIRE

Create a comprehensive pre-coaching intake questionnaire for a new [type of coaching] client. Include sections on: (1) Current situation (3 questions), (2) Goals and desired outcomes (3 questions), (3) Past attempts and what stopped them (2 questions), (4) Strengths, resources, and support system (2 questions), (5) Communication and learning preferences (2 questions), (6) Commitment level and potential obstacles (2 questions), (7) What success looks like in 3/6/12 months (1 question). Keep questions open-ended and psychologically safe.

90-DAY COACHING ROADMAP TEMPLATE

Create a 90-day coaching roadmap for a client working toward [goal]. Structure it in three 30-day phases: Phase 1 — Foundation (assessment, clarity, quick wins), Phase 2 — Momentum (core skills, habit building, removing blocks), Phase 3 — Mastery (advanced application, systems, sustainability). For each phase: 3 key milestones, 2 focus areas, and 1 measurable outcome. Present as a visual roadmap description I can put in a Canva document.

FIRST SESSION AGENDA

Write a structured agenda for a 60-minute first coaching session with a new client, [Name], who wants to [goal]. Include: (1) Connection + energy check (5 min), (2) Intake review — their top 3 answers from the questionnaire (10 min), (3) Goal clarification and success definition (15 min), (4) Current reality mapping — where they are vs. where they want to be (15 min), (5) Commitment to first action step (10 min), (6) Logistics and next session scheduling (5 min). Include specific coaching questions for each section.

CHAPTER 04

Delivering Powerful Coaching Sessions

Great coaching isn't improvised — it's structured exploration. These prompts help you prepare powerful questions, navigate resistance, and design exercises that create breakthroughs on demand.

SESSION PREP — POWERFUL QUESTIONS

My coaching client [Name] is working on [goal]. Their biggest current challenge is [challenge]. In our last session, they committed to [action] but [what happened — completed it / avoided it / hit an obstacle]. Generate 8-10 powerful coaching questions for our next session that: explore the deeper belief or block behind the challenge, create insight through pattern recognition, move toward action without pressure, and honor their autonomy. Questions only — no advice.

BREAKTHROUGH EXERCISE DESIGN

Design a 20-minute breakthrough coaching exercise for a client stuck on [specific block: fear of judgment / imposter syndrome / perfectionism / fear of failure / procrastination / money mindset / visibility / self-worth]. Include: (1) The setup and framing (how to introduce it), (2) Step-by-step instructions, (3) Debrief questions (3-4 questions to unpack insights), (4) The integration assignment they take home. Make it experiential, not just reflective.

SESSION RECAP & ACTION ITEMS EMAIL

Write a session recap email to send to [Name] within 24 hours of our coaching call. Key insights from the session: [list 2-3 main breakthroughs or realizations]. Commitments they made: [list their action items with deadlines]. Next session: [date/time or how to book]. Include: (1) A one-sentence reflection on a shift you noticed in them, (2) A clean bulleted list of their commitments, (3) One resource or question to sit with before next session, (4) Encouragement that feels specific and earned. Max 250 words.

RESISTANCE & AVOIDANCE COACHING SCRIPT

My client [Name] committed to [action] last session but [avoided it / made excuses / changed the subject]. Write a compassionate but direct coaching script for the first 15 minutes of our next session that: names the pattern without shaming, gets curious about what is underneath the avoidance, distinguishes between a real obstacle and a self-protection mechanism, and redirects toward a smaller, immediate commitment. Include the exact questions and reflections to use.

CHAPTER 05

Client Results & Accountability Systems

Results are the only product that matters. These prompts help you build accountability systems that keep clients progressing between sessions — and turn those results into powerful social proof.

WEEKLY ACCOUNTABILITY CHECK-IN MESSAGE

Write a short, warm accountability check-in message to send to my coaching client [Name] mid-week between sessions. They are working on [goal] and their current commitment is [specific action]. The message should: take under 60 seconds to read, check in on their progress without making them feel surveilled, offer a quick reframe if they are struggling, and reinforce that you believe in them. Write 3 versions: one for when they are on track, one for when they are struggling, one for when they have not responded to prior check-ins.

PROGRESS REVIEW (30/60/90 DAY)

Write a structured 30/60/90-day progress review template for coaching clients. The review should cover: (1) Wins and progress since we started (3 reflection questions), (2) Gaps between commitment and action — honest assessment (2 questions), (3) Insights and mindset shifts (2 questions), (4) Updated goals for the next period (2 questions), (5) Program satisfaction and what would make it more valuable (2 questions). Provide both a written questionnaire version and a discussion guide version for doing this live on a call.

RENEWAL / CONTINUATION CONVERSATION

Write a script for a renewal conversation with a client whose program ends in 2-3 weeks. Their name is [Name]. Their original goal was [goal]. Progress they have made: [achievements]. Remaining work: [what is still unresolved]. I want to offer [continuation program — name and price]. The conversation should: celebrate their progress genuinely, name what remains undone without pressure, make the continuation offer feel natural and logical, and handle the "let me think about it" objection. Include exact language.

TESTIMONIAL REQUEST SEQUENCE

Write a 3-message sequence to request a powerful testimonial from a coaching client who just completed their program. [Name] achieved [specific result]. Message 1 (end of program): warm request with a framing question that guides them toward a story-driven response. Message 2 (5 days later, if no response): gentle follow-up with an even simpler ask. Message 3 (10 days later): final ask with an ultra-easy option (2-3 sentences or a quick video). Include the exact guiding questions for Message 1 to extract before/after, specific wins, and emotional transformation.

CHAPTER 06

Content & Thought Leadership

Your content is your reputation in motion. These prompts turn your coaching insights into content that attracts clients, builds authority, and grows your audience — without requiring you to be a professional writer.

AUTHORITY CONTENT PILLARS

I am a [type of coaching] coach for [ICA]. Help me define 5 content pillars that will attract my ideal clients and establish authority in my niche. For each pillar: (1) Pillar name and theme, (2) Why this topic resonates with my ICA, (3) 3 specific post ideas, (4) 1 lead magnet idea related to this pillar, (5) The emotional hook that makes this content shareable. My goal is to post 5x/week across [platforms] and build a following of [ICA] buyers.

LINKEDIN THOUGHT LEADERSHIP POST

Write a LinkedIn post for a [type of coaching] coach. Topic / insight to share: [your insight, lesson, or story]. Format: hook (pattern interrupt or bold claim in line 1), story or proof (100-150 words), practical takeaway (numbered list or 3-5 bullet points), reflection question or CTA. Total length: 250-350 words. Tone: direct, warm, authoritative. No hashtag spam. End with a subtle nod toward your work without being salesy.

EMAIL NEWSLETTER (WEEKLY VALUE EMAIL)

Write a weekly value email for my coaching newsletter. My audience: [type of subscribers — coaches, entrepreneurs, executives, etc.]. This week's theme: [topic or lesson]. Include: (1) A subject line with 3 variations (curiosity / specificity / personal), (2) Opening hook — a relatable situation or uncomfortable truth, (3) The core lesson or framework (300-400 words), (4) One actionable step they can take TODAY, (5) A 1-sentence bridge to my offer (non-pushy). Tone: like writing to a smart friend, not a newsletter subscriber.

PODCAST PITCH EMAIL

Write a podcast pitch email to be sent to the host of [Podcast Name], which covers [podcast topic]. My coaching niche: [niche]. My story/hook: [brief compelling angle]. My specific episode angle: [topic you want to talk about and why it fits their audience]. The pitch should: open with a genuine compliment + specific episode reference, make the value for their audience crystal clear, position me as a credible expert (not an unknown guest), include 3 ready-to-use episode titles, and end with an easy next step. Max 250 words.

LEAD MAGNET + OPT-IN COPY

Create a lead magnet concept and opt-in page copy for a [type of coaching] coach targeting [ICA]. Lead magnet format: [PDF guide / quiz / video training / challenge / template]. Topic: [the specific value they will get]. Opt-in page copy: (1) Benefit-driven headline (3 variations), (2) 3 bullet points on what they will learn/get, (3) Social proof element (even hypothetical format), (4) Privacy reassurance line, (5) CTA button copy (3 options). Keep the entire page under 200 words — every word earns its place.

CHAPTER 07

Group Programs & Community Management

Group coaching is the highest-leverage model in the industry — same transformation, a fraction of the time per client. These prompts help you launch, fill, and run cohort programs that generate premium revenue at scale.

GROUP PROGRAM SALES PAGE COPY

Write a sales page for my group coaching program. Program: [name]. Duration: [length]. Format: [cohort / ongoing / weekly calls / async + calls]. Price: [investment]. ICA: [who it is for]. Transformation: [the specific outcome]. Include: (1) Headline and subheadline focused on transformation, (2) Pain section (3 bullets — the cost of the status quo), (3) Program description (what is included, session structure), (4) Results and testimonials section (format only — I will add real testimonials), (5) FAQ (6 common questions with answers), (6) Pricing + bonuses table, (7) Guarantee or risk-reversal statement, (8) CTA with urgency element (cohort fills, deadline, or limited spots).

LAUNCH EMAIL SEQUENCE (5 EMAILS)

Write a 5-email launch sequence for my group coaching program opening enrollment. Program: [name and transformation]. List: [warm audience — email subscribers / social following]. Enrollment period: [X days]. Emails: Email 1 (Day 1 — Doors Open): story + offer introduction + CTA. Email 2 (Day 2 — The Problem): agitate the pain they are living with. Email 3 (Day 4 — Social Proof): results-focused, 2-3 client wins (format for me to fill in). Email 4 (Day 6 — Objection Handling): address the top 3 objections + reinforce value. Email 5 (Day 7 — Final Hours): urgency + "last chance" close. Subject lines included for all 5. Tone: urgent but not desperate.

WEEKLY GROUP CALL FACILITATION GUIDE

Create a facilitation guide for a 60-minute weekly group coaching call for [program name]. Members are working on [goal]. This week's theme: [topic]. Structure: (1) Opening ritual — energy + wins round (10 min), (2) Teaching segment — core concept or framework (15 min, include 3-5 key teaching points), (3) Breakout or reflection exercise (10 min — specify the prompt), (4) Open Q&A; and hot-seat coaching (20 min — include 3 facilitation moves for difficult dynamics), (5) Close with commitments and celebration (5 min). Include language for managing dominant voices, drawing out quiet members, and keeping the call on time.

COMMUNITY ENGAGEMENT PROMPTS (30 DAYS)

Generate 30 community engagement prompts for my [platform: Facebook Group / Circle / Slack / Discord] for [type of coaching] clients. Include a mix of: reflection questions (8), celebration and wins posts (5), resource shares (5), challenge prompts (5), polls (4), and conversation starters (3). For each prompt, include the post copy AND a note on the goal (vulnerability, accountability, connection, etc.). Space them for Mon/Wed/Fri posting across 5 weeks.

CHAPTER 08

Pricing, Proposals & Business Finances

Under-pricing is the most common mistake coaches make — and it signals low confidence to the very clients you want to attract. These prompts help you price with authority, communicate value, and handle money conversations without flinching.

PRICING STRATEGY & VALUE JUSTIFICATION

Help me build a confident pricing structure and value justification for my coaching offer. My current price: [\$X]. My offer: [describe the program]. The transformation I deliver: [outcome]. My ICA's income or business size: [context]. Create: (1) An ROI calculation that justifies my price (what is the cost/value of the transformation?), (2) A price increase narrative I can use in conversations, (3) Comparison framing (what else could they spend this on with worse results?), (4) Three tiers of the same offer (entry / core / premium) with what each includes. I want to charge more with zero guilt.

RAISE YOUR RATES ANNOUNCEMENT

Write a rate increase announcement for my existing coaching clients. Current rate: [X]. New rate: [Y]. Effective date: [date]. Give current clients until [date] to lock in old rate. The announcement should: lead with gratitude and relationship (not apology), frame the increase as a reflection of increased value and demand, make the grandfathering window feel like a genuine gift, and include a clear call to action for clients who want to lock in. Email format. Tone: confident, warm, no over-explaining.

COACHING CONTRACT ESSENTIAL CLAUSES

Draft the essential clauses for a coaching services contract for a [type of coaching] practice. Include sections on: (1) Scope of services and what coaching is/is not (not therapy, medical advice, legal advice), (2) Session scheduling, cancellation, and no-show policy, (3) Payment terms and late payment fees, (4) Refund policy, (5) Confidentiality obligations (both parties), (6) Intellectual property (who owns materials and session recordings), (7) Limitation of liability, (8) Termination clause (with or without cause). Note: I will have this reviewed by an attorney before use. Write it in plain language.

DIFFICULT MONEY CONVERSATION SCRIPT

Write scripts for these difficult coaching money conversations: (1) A prospect says "I love this but I truly cannot afford it" — how to respond with empathy while protecting the value of your offer (no heavy discounting), (2) A client misses a payment — how to follow up professionally without damaging the relationship, (3) A client asks for a refund after 2 sessions — how to respond when your refund policy doesn't cover this, (4) A client wants to pause the program indefinitely — how to handle the contract and reschedule gracefully. Scripts should be direct, compassionate, and non-apologetic.

CHAPTER 09

Business Operations & Systems

The coaches who scale are the ones who systematize. These prompts turn recurring tasks into reusable processes — so your business runs without you needing to reinvent the wheel every week.

STANDARD OPERATING PROCEDURE (SOP) CREATOR

Create a Standard Operating Procedure (SOP) for the following recurring task in my coaching business: [describe the task — e.g., onboarding a new client, preparing for a session, launching a new cohort, etc.]. The SOP should include: (1) Overview and purpose, (2) Who is responsible, (3) When it happens (trigger or schedule), (4) Step-by-step instructions (numbered, specific), (5) Tools and resources required, (6) Quality check / definition of done. Format as a document I can paste into Notion, Google Docs, or train a VA on.

COACHING CRM & CLIENT TRACKER SETUP

Help me design a client management system for my [size: solo / small team] coaching practice. I currently manage [X] clients with [tool — Notion, Airtable, spreadsheet, nothing]. For each client I need to track: status, program, start/end date, session notes, action items, payment status, referral source, and testimonial status. Design the database structure and field types for [my chosen tool], and write the setup instructions. Also suggest 3 automations that would save the most time (e.g., payment reminders, session prep reminders, testimonial requests).

VA DELEGATION BRIEF

Write a delegation brief for a Virtual Assistant to take over the following tasks in my coaching business: [list 3-5 tasks — e.g., scheduling, email management, social media posting, client follow-up messages, invoice tracking]. For each task include: (1) What the task is and why it matters, (2) Step-by-step instructions, (3) Tools they will need access to, (4) Quality standards and what "done well" looks like, (5) How often to do it and when to escalate to me. Write it clearly enough that someone with no coaching industry knowledge could follow it.

QUARTERLY BUSINESS REVIEW TEMPLATE

Create a quarterly business review template for a solo coaching practice. Sections: (1) Revenue review — total revenue, per-client average, best and worst performing offers, (2) Client results — outcomes delivered, testimonials collected, referrals generated, (3) Content and audience growth — follower growth, email list growth, top-performing content, (4) Operational review — what worked, what created friction, what to systematize, (5) Next quarter goals — 3 revenue targets, 3 client experience targets, 3 personal/wellness targets, (6) Strategic decisions — offers to sunset, launch, or test. Include prompting questions for each section.

CHAPTER 10

Scaling Beyond 1-on-1

Trading time for money has a ceiling. These prompts help you productize your expertise, launch digital offers, and build the systems that generate revenue even when you are not coaching — turning your knowledge into a scalable asset.

SIGNATURE METHODOLOGY / FRAMEWORK BUILDER

Help me articulate my unique coaching methodology as a branded framework. My coaching approach: [describe how you work]. Core principles: [2-3 beliefs that underpin your work]. The transformation I deliver: [outcome]. Format my approach as: (1) A memorable acronym or name for the framework (5 options), (2) 3-7 steps or phases with names and one-line descriptions, (3) A visual diagram description I can build in Canva, (4) A one-paragraph "how it works" description for my website, (5) A 60-second verbal explanation I can give on a podcast. This framework becomes my IP and differentiator.

DIGITAL PRODUCT / COURSE OUTLINE

Create a complete course outline for a [format: self-paced online course / digital workbook / workshop / mini-course] based on my signature methodology: [method name or description]. Target: [ICA]. Transformation: [outcome]. Format the outline as: Course title and subtitle (3 options), 5-7 modules with names and descriptions, 3-5 lessons per module with titles, one exercise or deliverable per module, a "Quick Win" designed to get results within the first 48 hours, and a course completion milestone. Also suggest: ideal price point, platform to host on, and one marketing angle for the launch.

SPEAKING / WORKSHOP PITCH DECK OUTLINE

Create an outline for a speaking pitch deck to book paid speaking engagements or corporate workshops. My topic: [topic]. My target audience: [conference / company / association audience]. My unique angle: [what makes my perspective different]. The pitch deck should include: (1) Cover slide — topic + hook, (2) About me — positioned for the audience (credibility without ego), (3) The problem this talk solves, (4) Talk overview and key takeaways (3), (5) Audience transformation — what they walk away with, (6) Social proof section (format), (7) Past speaking / media mentions (format), (8) Call to action slide. Also write the email pitch I send when submitting this deck.

AFFILIATE & REFERRAL PARTNER PROGRAM

Design a referral partner program for my coaching practice. I offer [program name] at [price]. Help me create: (1) Partner tiers and commission structure (suggest 2-3 tiers with % or flat rate), (2) Who my ideal referral partners are (complementary businesses, former clients, adjacent professionals), (3) The partner pitch — what I send to invite someone to become a partner (200 words), (4) The referral tracking system (tools and process), (5) Partner onboarding — what I send when they join (welcome email + referral link setup), (6) Monthly partner communication template to keep them engaged and referring. Make it passive and professional.

BONUS

BONUS: The 15-Minute Weekly Business Review

Your AI-Powered CEO Routine for Coaches

Purpose

Most coaches are great at their craft and terrible at running their business. This 15-minute weekly ritual keeps you in the CEO seat — tracking what matters, clearing bottlenecks, and making micro-decisions that compound into massive results over a year.

Step 1 — Revenue Pulse (3 minutes)

Paste into your AI: "I'm a coaching business. This week I had [X] discovery calls, [Y] new clients signed, and collected \$[Z] in revenue. My goal for this month is \$[amount]. I have [X] days left. Tell me: am I on track? What's the single most important revenue action I should take this week?"

Step 2 — Client Health Check (4 minutes)

Paste into your AI: "I have [X] active clients. Here is a quick status on each: [Client 1: progressing well / stuck / at risk / program ending soon]. [Client 2: ...]. Flag any clients who need my attention this week and suggest one action per flagged client."

Step 3 — Content Efficiency (4 minutes)

Paste into your AI: "Here were my top 2-3 pieces of content this week and their performance: [describe]. Based on this, suggest one content angle I should double down on next week, one I should stop, and two high-potential post ideas that fit my [niche] audience."

Step 4 — One Decision (4 minutes)

Paste into your AI: "I'm avoiding this decision or action in my business: [be specific — a price increase, launching a new offer, firing a client, hiring help]. Help me get clear. What information do I actually need to decide? What's the cost of not deciding? What would I tell a client who came to me with this same hesitation? Then make the recommendation."

Why This Works

The point isn't the AI answers — it's the forcing function. Once a week, you step out of delivery mode and into owner mode. The questions force clarity. The AI accelerates it. Fifteen minutes of weekly CEO work compounds into \$100K decisions made with confidence instead of fear.

Appendix: AI Tools for Coaches & Consultants

Claude (Anthropic)

Best for: Nuanced coaching conversations, complex frameworks, long-form content. Strength: Understands context deeply, handles sensitive topics with care. Price: Free / \$20/mo Pro. Best use: Session prep, proposal writing, content creation.

ChatGPT (OpenAI)

Best for: Quick drafts, idea generation, brainstorming. Strength: Fast, versatile, huge plugin ecosystem. Price: Free / \$20/mo Plus. Best use: Social media content, email sequences, FAQ drafting.

Notion AI

Best for: In-app writing assistance for your CRM and SOPs. Strength: Works inside your existing Notion workspace. Price: \$10/mo add-on. Best use: Session notes, client trackers, SOP documentation.

Descript

Best for: Podcast and video editing with AI transcription. Strength: Edit video by editing text — removes filler words automatically. Price: Free / \$24/mo Creator. Best use: Repurposing coaching content into video clips.

Copy.ai

Best for: Marketing copy at volume. Strength: Built-in templates for landing pages, emails, and ads. Price: Free / \$49/mo Pro. Best use: Sales page variations, ad copy, email subject lines.

Loom + AI Summary

Best for: Async client communication and course content. Strength: Record once, AI creates chapters and summaries automatically. Price: Free / \$15/mo Business. Best use: Onboarding videos, session recaps, training materials.

Calendly + AI Workflows

Best for: Automated scheduling with pre-call prep. Strength: Routing logic + AI follow-up sequences. Price: Free / \$12/mo Standard. Best use: Discovery call booking, session reminders, post-call automations.

Jasper

Best for: Brand-consistent long-form content at scale. Strength: Brand voice training — learns how you write. Price: \$49/mo Creator. Best use: Blog posts, course content, email newsletters at volume.

Ready to scale?

Explore more AI tools, templates, and automation workflows at useomni.ai.com/shop/