

# Coaching Transcript - Client Off-Ramp Starter Kit

Caroline: Welcome to your free training. This is your Client Off-Ramp Starter Kit, and we are so excited to cover three main things in this training session.

Jason: We're going to go over, number one, your four piece audience puzzle. We all love puzzles. Number two, your client runway sprint. And number three, your time block plan.

Caroline: This is me sprinting.

Jason: Nicely done.

Caroline: Thank you.

Jason: Let's get into it.

Caroline: Okay, so just right off the bat, we want to make sure you're in the right place. Does this sound like you? You keep hitting the same income ceiling every month because you can only take on so many clients at a time. You're tired of always feeling glued to your email, anticipating that next client request.

Jason: Never fun.

Caroline: You're exhausted from managing different personalities with every new project. That doesn't mean you don't love your clients. It's just, it's a lot. Everyone's different, right? Maybe you crave the freedom and flexibility that you know digital products like online courses and programs can provide, but you're just so overwhelmed by the thought of how to make it all happen when you're already stretched thin with your client business. We've been there. So the thing is, we can help if this is you. This is why you signed up for the Client Off-Ramp free training session. And that is what we are here to talk about.

Jason: So you're here because you want the freedom and flexibility to choose which clients, if any, you work with, and you want your business revenue to scale with digital products. That sounds fun.

Caroline: We're talking online courses, we're talking templates, we're talking anything that can scale beyond your time in working with clients.

Jason: The road to that future begins now.

Caroline: In this very short training session, we are going to cover three exercises to gain the three most important things to make this client to product transition finally happen. And so these three things are, number one, a clear path, because probably that's holding you back. You don't know how to move forward. Number two, cash leverage. Number three, more time. So if these things sound like three things that you might need in your life, let's keep going.

Jason: I also love maps, money, and malarm clocks.

Caroline: Malarm clocks.

Jason: So the three M's here.

Caroline: Is what you said, just so you're aware.

Jason: Malarm clocks. They're malarm clocks. All right, so who the heck are we? That's me. I'm Jason Zook.

Caroline: Wow. And I'm Caroline Zook.

Jason: That's my wife, Caroline Zook.

Caroline: Hopefully you knew that already.

Jason: Maybe.

Caroline: If you signed up for this free training.

Jason: If not, nice to meet you.

Caroline: Yeah.

Jason: We've been running online businesses for a combined 25 years. Caroline for 10, me for 15. We both started with service based design businesses. We didn't like the lack of flexibility and limited revenue potential of these.

Caroline: Yeah, so my first year that I transitioned from doing solely client work to then doing digital products in the form of online courses, that was the first time that I hit \$100,000 in revenue for the year. But the more important thing is not just that revenue number, although that's probably partially why you're here. But for me, I struggle with anxiety. I struggle with mental health things. And so my mental health is extremely important to me. And that was the biggest thing for me, is when I had the flexibility of doing online courses, I could run my business in a way that was a lot better for my mental health.

Jason: Yeah. And then for me, my first years of running digital products, I was able to generate \$500,000 in revenue, which was amazing. But what was even more amazing to me was the creative freedom and the flexibility that came with doing that type of work. I wasn't at the beck and call of my email. Clients weren't telling me what to do every day. I could make up my own schedule, my own work. And that was really awesome. And revenue isn't everything for us, but we know that's part of why you're here. So we wanted to share that part of our journey because it is possible and you can do and achieve the same goals we have, or your own goals, because you can choose those yourself.

Caroline: So another important thing to know about our story is that in 2018, we actually took our separate digital product businesses. We combined them to create an onboarding coaching program for intentional online business owners called Wandering Aimfully. That's likely where you found this free training on our website. And to date, we have helped over 1000 online entrepreneurs grow their revenue, live with less stress, and then also have more fun in their businesses. You will notice that we don't like to do things boring around here.

Jason: Malarm clocks.

Caroline: Because malarm clocks.

Jason: You know?

Caroline: All right, let's get into the training. So there is one absolute non-negotiable thing that you need in order to earn reliable income with digital products. And you probably already know this, but we're going to reiterate it. You need an audience, right? You need a group of people who are interested in what you have to share so that they can learn from you and you can sell to them in the form of your offer, which is going to be some type of digital product. That might be overwhelming, too, because you're like, what even... how do I start to build an audience? You see people talking about this online. We have just boiled it down into four, what we call the four part audience puzzle. This is just kind of like our simple framework for it. And you're going to need four things. So the simplest four piece framework to build your audience is going to be puzzle piece number one, your product. Puzzle piece number two is your email newsletter. Puzzle piece number three is your lead magnet. And puzzle piece number four is your website. Like, this is the bare bones. You need these four things if you're going to build an audience and eventually earn money selling your digital products. However, right now, you don't need to have all these things figured out, right? All you need is an idea for your digital product. You need an idea for a weekly email newsletter, an idea for a lead magnet that might be able to attract people to your email list, and an idea for where to put a sign up form on your website and what you want that to say. So that's all we want to cover in this mini-training session. We don't want you to try to figure out every step along the way, just the main four pieces so that you can have that clear path forward. And honestly, by simply identifying these four pieces to the puzzle, you will be surprised by the relief that you feel just by being able to see that clear path forward. So this four piece puzzle is going to be your North Star moving forward, and let's get into each individual piece. All right, let's dive into the first piece of the puzzle, your product. So here's what

I want you to do. I want you to write down the repeatable process that you take your clients through right now. You probably have maybe three to five steps that you kind of take them through that journey. Write that down. Number two, I want you to write down three of the major hurdles that your clients typically encounter in that process. And then write three tools or tips that you offer them in order to overcome those problems. You've probably established over time your own unique way of solving these problems. So write that down. And then congratulations, you just came up with your offer's curriculum outline.

Jason: Nicely done.

Caroline: We know that's like an oversimplified way of approaching it, but truly, if you haven't been able to get started yet on what this product is or this online course, this is a fantastic place to start. And then finally, what does your gut tell you is the best way to deliver this info? So is it a self-paced online course where they're watching videos? Is it a one-day intensive where you can go really deep with a small group of people? Is it a digital download that it's a template, it's something someone can use? What is it exactly? And just to give you an example for myself, my first big signature online course was called Better Branding Course. It took my brand process that I had for clients and it applied it to just people doing their own DIY brand. My four steps to the process were brand story, brand concept, brand execution, and then brand activation of how to apply that brand everywhere. And those were the modules of my course. I did exactly what I would take my clients through. And then my three hurdles that I identified were people would come to me and say, I don't know how to not copy what I see everyone else doing so everything looks the same. And I came up with this brand DNA formula that I would use to help them break out of that. Their tone words. They weren't exactly sure how to match the emotional tone to the visuals. So I had an exercise called visual vocab for that. And then finally, they were really overwhelmed with all of the design choices, all the fonts, all the colors.

And so I had this reverse logo process to help them overcome that decision fatigue and choice overwhelm.

Jason: Welcome to the second piece of the puzzle, email newsletter. Also a four piece puzzle, my favorite. They're all edges. It's easy to do. Think about the person you plan to help with your product offer and ask yourself this question, What are five specific problems they run into in these three categories? So category number one, getting started.

Caroline: I wish I was like Vinton White.

Jason: Ooh, nice.

Caroline: Category number one.

Jason: Category number two, mindset. And category number three, process. You now have 15 weekly newsletter topics. Whether you send an email newsletter every week, every other week, every month, you have 15 topics you can send to your person to help them around your product offer.

Caroline: Exactly. So just come up with, however, what advice or solutions you would give to these 15 problems. And that is a runway of 15 newsletters right there.

Jason: Congrats.

Caroline: Onto the third piece of the puzzle, your lead magnet. So hopefully you've heard of this term before, but your lead magnet is just going to be a free, valuable piece of content that you

can use as an incentive to attract people in your audience to the email newsletter that we just talked about. Right? Go back to your product offer idea and circle just one of the main hurdles that you wrote down and your tool or your tip for solving it. If we're just using the Better Branding Course as an example, I had my three problems there. Let's say I just zeroed in on this &quot;Everything's the same&quot; problem that people came to me with, and I wanted to package up that brand DNA solution into my lead magnet. So you're going to do the same thing. You want to ask yourself, how can you package that knowledge and offer it for free? It could be a pdf download. You've seen plenty of those. It could be an email course, a video training like the one that you're watching right here, a private blog post, anything. So for me personally, I took this brand DNA formula and I actually packaged it into a five-day email course called Discover Your Differentiator. And I just explained the brand formula, and that was my lead magnet. Don't be afraid to offer up some of that content that would be in your digital product for free. Because remember, it's not the full process, it's not all the information. It's just like... we like to call it your iceberg. It's just like the tip of the iceberg so that they can really see that you deliver value.

Jason: And the final piece of the puzzle, your website. Fill in the blanks to write copy for one section of your website homepage using this formula we're going to give you. Remember, you're talking to your ideal audience member. So ask the question, Are you tired of \_\_\_\_\_? This is the key lead magnet problem. Get my \_\_\_\_\_ (lead magnet). And I'll teach you how to \_\_\_\_\_ (the lead magnet benefit) and \_\_\_\_\_ (another benefit) so you can start \_\_\_\_\_ (give them the outcome). That's it. Once you have your lead magnet created, you'll have the exact copy to create an opt in form on your website and your puzzle pieces will be connected. This is also so much more compelling than &quot;Sign up to get my email newsletter,&quot; which no one really cares about.



Caroline: And of course, there's other pieces to your website. You can't just have this. But remember, we're going to a clear path here. These are just the four critical pieces that you need. And so, again, you're going to feel so much relief once you know what that opt in copy is, you're going to go, Oh, I see how this attracts my lead magnet. That builds my audience. And once you finally have that lead magnet created, you put this up with an opt in form and you're going to be able to start growing your audience finally.

Jason: Let's show you an example.

Caroline: Okay, so using my Better Branding Course example, yet again, here's how I would fill in those blanks on the previous slide. Are you struggling to design a DIY brand that stands out from the crowded sea of similar businesses online? Take my free Discover Your Differentiator five-day email course and I'll teach you my simple brand DNA formula for turning your unique story and personality into unmistakable branding so you can finally attract your ideal customers and clients online and feel proud of your online presence.

Jason: Nice. Compelling.

Caroline: You can reposition that and make it more clever. Make it shorter if you want to. But as long as you have these pieces, you know that it's going to offer some type of problem and solution to the person that you're trying to attract into your audience.

Jason: All righty, the puzzle recap. We have finished putting this four piece puzzle together. Didn't take very long. Congratulations, us. Your product offer. You have an idea of the product offer you want to start selling and what problem it solves for what audience.

Caroline: Check.

Jason: You have an email newsletter. You have an idea of 15 different weekly newsletters to start sending to your list when you're ready.

Caroline: Check.

Jason: Congratulations. You have your lead magnet. So you've picked out one tiny problem your ideal audience has and how you can solve it in the form of a compelling lead magnet.

Caroline: Check.

Jason: Thank you for the check. And you have your idea of your website compelling copy. So you have an idea of how to pitch your lead magnet on your website to attract new subscribers.

Caroline: Quadruple check.

Jason: So many checks. Oh, look at you.

Caroline: You're dancing corgi.

Jason: I didn't know you were a corgi, but that's awesome.

Caroline: But you are. Now that you have your clear path forward, let's move on to that second piece, your cash leverage. So it's going to be hard to work on any one of those four pieces of your puzzle when you're constantly pulling your focus away to chase down your next client and

make sure that your bills are paid. You need a strategy for building cash leverage so that you can devote more brain resources to building up your audience puzzle. Remember, it's not about money here, but correct me if I'm wrong, you're probably having trouble actually building up that audience because you're always trying to look for that next client to just make sure that you have money coming in the door, right? So we need to solve for that problem. So your cash leverage strategy is what we call a Client Runway Sprint. So instead of continuing to get clients haphazardly, let's focus on a sprint in order to build up your client runway and your monthly income for the next six months so you don't have to spend time trying to land clients while building your digital product business. It doesn't have to be six months. We've just found that that's a really good runway in order to feel that sense of relief so that you can start to work on that digital product business. And we just want to make it clear, we're not those business coaches who... we don't use words like sprint very lightly. We don't like to talk about hustling and just working harder.

Jason: We don't like running at all to be honest.

Caroline: I don't understand runners.

Jason: Yeah.

Caroline: Truly.

Jason: Yeah.

Caroline: If that's your thing, more power to you, but it's not mine. But the important part is we do believe in focus. And so that's all we really mean by sprint is just a focused period of time

where finally you go, I'm going to worry about getting my client schedule booked out so that I have the cash leverage to now devote my time and resources to building up my audience. So let's talk about what those three steps are going to be to your client runway sprint. Number one, you want to identify your current client cash. Number two, you want to identify your goal client cash. And number three, you want to go all in on outreach.

Jason: First up, your current client cash. Identify what clients you already have on your schedule and how much they're paying you each month. The goal of this is to understand your current cash flow projections and your available capacity, which brings us to your client cash goal.

Caroline: Nice.

Jason: This is obviously a little bit different because this is where you want to get to.

Caroline: Yup.

Jason: You need to know your monthly minimum magic number.

Caroline: We call this your MMM number.

Jason: This is how much you need to pay your bills. So this is just like, barely covering everything, and you're not trying to do this for a very long time. This is just that six-month time window. But you just want to try and get your expenses down to the minimum so that you can work on client work the minimum so you have more time for your digital products. We'll talk about time in a second. You need to know exactly how many client projects you need in order to meet your minimum number so you can figure that out for yourself. The example here would be

four projects at \$1,000 per client would be \$4,000 a month, and you want to build out a roster of client slots six months from now. So like Caroline said, we just want to give you that space and that time so that you feel like you actually have a little bit more on your calendar, where I know my clients take up, but I also have time for my digital product business. And now you know exactly what your available time inventory is. So you can see, okay, I can only work with four clients, so even if another client comes to me, I'm booked up for six months. That's all I can take on. This is your goal. It's great to have a goal, but let's do an outreach sprint to achieve it. You're going to do this for three to four weeks. You're going to focus solely on the availability you're trying to fill. I only have five client spots available for the next six months. This is the way that you let people know what your availability is because it's very likely in the past, you haven't really had an availability. You just said, I need a new client.

Caroline: Right.

Jason: So it's very different.

Caroline: And that's what the time availability inventory really helps with.

Jason: Yeah. You're going to email any past clients and any existing clients and tell them about your availability so that they know they can scoop some of your time up. You're going to post multiple times on social media accounts, letting people know about the availability and when that's kind of running out.

Caroline: And don't be afraid to let people know, Yeah, I'm really in a sprint right now to fill up my client calendar because I know that there's going to be a time period where I'm really focused. You can be honest.

Jason: Yeah, absolutely. And I think people respect the fact that, Oh okay, I've wanted to work with you, but I didn't know that there was maybe a time frame that you were looking to book clients in. So you're going to reach out to friends and colleagues as well. People tend to forget that they're closest people who trust them the most actually know other people who might want to work with you.

Caroline: And just to be clear, you don't necessarily need to reach out to all your friends and say, Can you be one of my clients? Reach out to your friends and colleagues and say, Do you know anyone who's in need of my service?

Jason: And then you're going to have an outreach list of clients that you've wanted to work with. So this could be maybe your dream list or just list of clients that have always been on your list that you wanted to reach out to before. And the more you fill up this runway, the more cash leverage you will have so that you will create more time to build the digital product business, to scale your revenue and to reach those goals that you're setting for yourself.

Caroline: That is our cash leverage. But the final piece to all of this is time, right? And so this last part is absolutely crucial because it's probably the one bottleneck that's preventing you from taking action on anything that we've mentioned previously in this training. You simply need more time. But how? That's the big question.

Jason: And what is time, really?

Caroline: What is time?

Jason: Wow.

Caroline: Is it a construct? These are our tips. So we want you to gain more time with what we call non-negotiable time blocks. If you don't carve out time in your schedule regularly to work on your digital product business, aka the four part puzzle, it simply won't happen. It's not going to happen by magic. It's going to take a decision to finally make this shift a priority. And unfortunately, there's nothing that we can tell you in this moment that is going to, like I said, magically get you more time, except for you have the power to say, Finally, I'm going to make this a priority. So here's what we recommend. Non-negotiable time blocks. Is it 1 hour every morning? This is not like wake up at 4:00 am.

Jason: We're not those people.

Caroline: This is not that advice.

Jason: Yeah.

Caroline: It's just saying, what can you trade right now? What can you try to compress so that you can try to carve out that 1 hour? Is it every morning? Is it just Fridays completely? And saying, I was going to do client work on Fridays, but now that is my protected audience building space. I'm going to work on my puzzle every Friday. Or is it maybe you can only work on your digital products on the side on weekends. And again, this is not about trying to carve into your life or like, trying to burn the candle at both ends, but it is about the realization that it hasn't happened yet. You haven't been able to make this transition yet for a reason, and it's likely because you're just not getting extremely strict with how that time is being used, right? So it's time to decide that that time is sacred. And remember, future you already booked yourself.

Jason: Nice.

Caroline: So if it's a Friday and you're like, really past you, I guess.

Jason: Yeah.

Caroline: Future you who wants a more digital product business.

Jason: Again, we're getting into time.

Caroline: It's a time continuum.

Jason: It all goes back to the alarm clock, if we're being honest.

Caroline: True. And so remember, if you don't make the time, your digital product business will never have a chance to create financial freedom and extra time in your life. So it's one of those chicken or the egg things. You're going to have to find the time to make the time down the road. And finally, you can use our companion workbook in order to really commit that time and write down what your plan is.

Jason: All righty, one final note about mindset, because having all the tips and tricks and tactics and all those things are great, but mindset is super important. And the one we want you to think about here is embracing the short term squeeze. If you're feeling pulled in two directions during this time, you're not doing it wrong.



Caroline: There's not a secret that you haven't learned yet. You're doing it right.

Jason: Yeah. This is the nature of transitions. So this short term squeeze is for your long term peace peace. So come back to your why with every hour you devote to building this new side of your business. And understand, I might be working maybe a couple more hours than I want to right now, but in six months, I see that going away. I might be taking on a couple more clients that aren't my dream clients right now, but I'm not going to be working with clients in six months or a year. So any of those things are going to help you embrace that short term squeeze so you can reach your long term goals.

Caroline: Something you will learn about us is we love action taking. So we have a little checklist of action steps for you of how to actually apply what we just went over. So you're going to define the four parts of your audience puzzle using our workbook. Meaning, you're going to decide on a product idea. You're going to write down 15 ideas for newsletter topics so no longer do you have the excuse I don't know what to write about. You're going to decide on a lead magnet to start with, and you're going to write your opt in copy that eventually you'll put on your website so people can sign up for your email list, and get that lead magnet. Then you're going to use our three steps to come up with your Client Runway sprint plan to build that cash leverage. And finally, you're going to define your non-negotiable time blocks so that you actually can carve out the time to do all the rest of this.

Jason: Congratulations.

Caroline: You're going to do it.

Jason: Great job.

Caroline: You have a plan.

Jason: You got this.

Caroline: This is exciting.

Jason: Go set your malarm clock and make it happen. I had to do one more malarm clock. I'm so sorry.

Caroline: All right, friends, that's it. You finished the free training. We are so happy that you joined us. We hope that this gave you lots of ideas, and most importantly, just like a plan.

Jason: Yeah. And you've got that plan that you can put into action via the workbook that we've sent you. If you're watching this video, it's going to be, like, around here somewhere. And then also, you'll hear from us via email. So if you have any questions, feel free to hit reply. There's no assistant. There's no robot who answers our emails. It's just us. It's mostly me.

Caroline: True.

Jason: So we'd love to hear from you. We hope you had a good time learning in this thing and you're going to put some of these action steps together right away.

Caroline: Yes. Best of luck.

Jason: That's it.

Caroline: And we're so happy for you.

Jason: Okay. Do we get up and leave or do I... What do we do here? How do we do end this?

Caroline: Yeah, we can leave.

Jason: Do we just, like, walk off camera?

Caroline: Just like, close your eyes and...

Jason: But I'm wearing...

Caroline: Disappear.

Jason: I'm wearing, like, jammy pants, though.

Caroline: Can you put a transition in where it's like we just disappear into the ether?

Jason: No, we don't have the budget for that.

Caroline: Oh, okay.

Jason: We're just going to say goodbye.

Caroline: Bye.