

The Ultimate Guide to Online Coaching [PDF, 2022]



If you're a coach in today's world, you know that doing at least some of your coaching online is no longer an option—it's a necessity!

With online coaching, you can **get clients around the world**, broaden your audience, and help more people than you could ever reach by limiting yourself to in-person coaching.

Whether you're a mostly in-person coach who is looking to move your practice online, a practicing coach who wants to ramp up your online presence, or just starting out in the coaching business, this ultimate guide is for you. It will walk you through the basics of online coaching, how it works, and some best practices to apply to online coaching.

If you're ready to get started as you read along, we suggest you **start a 30-day trial of Quenza for just \$1**, and try out all the steps below as we guide you on your online journey.

How Does Online Coaching Work?

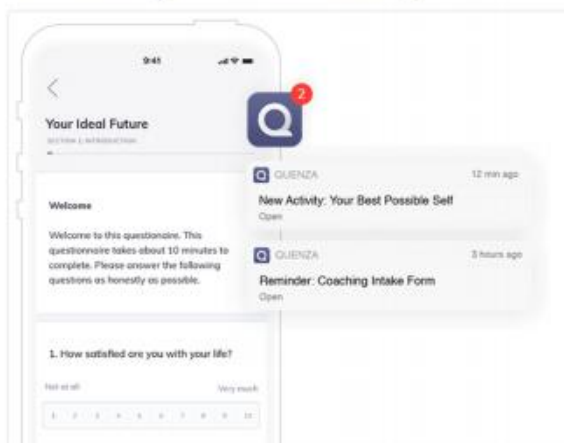
First, let's define **online coaching**.

Much like traditional coaching, it's "a non-hierarchical, development relationship between practitioner and client."^[1]

However, unlike traditional coaching, the interactions between coach and client take place over the internet.

Coaches often opt to use video chat and email to connect with their clients, but they may also use mediums like text messaging and phone calls to communicate.

Online Coaching vs Offline Coaching





Online coaching digitalizes the traditional process by using virtual exercises, conversations, and interventions, often delivered through a coaching app like Quenza (pictured).

Online and offline coaching have the same goal: to help the client with a particular problem or challenge.

Many of the traditional offline coaching techniques can be easily adapted for online use, making it a familiar experience for those who have done in-person coaching before.

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Online coaching also offers several unique benefits that offline coaching does not.

4 Benefits of Online Coaching

These benefits include:

- 1 **Convenience:** coaches and clients can work together from anywhere in the world, at any time that suits them.
- 2 **Compatibility:** it's easier to find the perfect coach or client for you when you have options from all over the world rather than only those within a certain radius of your home.
- 3 **Efficiency:** the less time spent on traveling to get together in person, the more time there is to get straight to the coaching itself.
- 4 **Tools and resources:** today's technology offers tons of tools, resources, and other options that face-to-face coaching can't provide, like automatic progress tracking, online assessments, and quick and easy resource sharing.

7 Different Online Coaching Niches To Pursue

Online coaching is broad, and encompasses many different coaching types and subtypes. You may not need to decide right away, but know that there are several options for specialization.

As a quick example, here are some of the most popular niches where you can help people right now:[2]

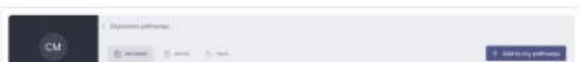
- 1 Mindset and accountability coach
- 2 Health and fitness coach
- 3 Small business coach
- 4 Relationship coach
- 5 Career coach
- 6 Parenting and family coach
- 7 Executive coach

Online Health Coaching

As noted above, online health coaching is a big and busy industry. As a health or wellness coach, you can work with people to help them build happier, healthier lives.

Practicing online gives you access to tons of tools and resources that can help your clients stay on track, like health monitoring, wearable devices, and digital diaries.

Plus, you can still do things like showcase workouts or demonstrate stretches via live video chat or prerecorded videos!





Online Nutrition Coaching

Nutrition coaching is another large and growing niche of online coaching.

It's easier than ever to find the right online tools to help your clients learn about nutrition, track their eating, and engage with food more knowledgeably and mindfully.

Whatever your area of expertise, there are ways to engage with clients and provide your services online.

How To Do Online Coaching The Easy Way

There are many ways to go about online coaching, and some are easier than others. The right methods will depend on your unique needs and those of your clients.

However, there are some general rules that will make it much more likely that your online coaching experience will be a good one, including:

- Set expectations upfront about the services you provide, what you expect from your clients, and any policies and procedures you have.
- Use dedicated software to help you manage your business. You won't regret it!
- Stay on top of scheduling and use appointment reminders—for yourself and your clients.
- Ask for—and pay attention to—feedback from your clients. Adopt a **growth mindset**.

5 Ideas and Tips For Your Sessions

"There are many traits and skills that make for a good coach, starting with the basics like good communication and empathy."

There are many traits and skills that make for a good coach, starting with the basics like good communication and empathy.

Building off of these foundational pieces, there are 5 tips to make sure your **coaching sessions** are effective:[3]

- 1 **Ask good questions:** well-thought-out, **open-ended questions** are a must for effective coaching sessions.
- 2 **Listen and encourage:** good questions are vital, but remember to leave your client's space to answer! Use active listening, rephrase what you hear, and ask for clarifications when needed.
- 3 **Guide the conversation:** keep the session goals in mind, and use topics, techniques, and approaches as necessary to help your client find their own solutions.
- 4 **Have a positive approach:** maintain a positive outlook and keep your client on a positive track. It's good to acknowledge frustrations and setbacks, but frame it positively to move forward.
- 5 **Generate personal responsibility and ownership:** help your client see the options in front of them and make their own choices rather than making choices for them. Let them take pride and ownership in their journey.

Recommended: [The 25 Best Life Coaching Books of All Time](#)

3 Questionnaires and Forms To Send To Clients

When you're getting started with new clients, it's a good idea to do some information gathering right off the bat. You want to make sure you have what you need to help your clients achieve their goals.

Using questionnaires, assessments, and other **intake forms** is a great way to do this.

Your Coaching Goals and Expectations

Your current life

On a scale of 1 -10 how happy are you with your life right now?

1	2	3	4	5	6	7	8	9	10
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Not happy at all Very happy

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Quenza's Pre-Coaching Questionnaire is a versatile intake form that can be adapted to suit your specific niche and client base.

Here are three good examples, available as part of Quenza, for getting your coaching relationship off on the right foot:

- 1 The Pre-Coaching Questionnaire:** this brief but deeply valuable questionnaire collects information on where your client is right now, what is important to them, and what they hope to gain from this coaching engagement. It's a perfect starter for most coaching relationships, and is pictured above.
- 2 Mindfulness Training Intake Form:** if you are a coach who uses **mindfulness practices or training**, this is a great way to set expectations while you gather pertinent information. Find out why your client is interested in becoming more mindful, whether they've practiced before, what limitations they have (if any), and give them an idea of the level of commitment you're expecting from them. Take a look at this exercise below.
- 3 Life Domain Satisfaction:** this basic assessment will help you understand where your client is regarding their satisfaction with an expanded repertoire of the many domains of life, including health, self-esteem, goals and values, money (or standard of living), work, play (or recreation), learning, creativity, helping, love, friends, children, relatives, home, neighborhood, and community.


Mindfulness Training Intake Form

Introduction

Dear Client first name,

I would like to ask you to complete the following questionnaire. I realize the personal nature of the following questions and appreciate your time in completing these forms. Please note that the purpose in asking these questions is to help you have a positive result from taking the mindfulness program. Also, please be assured that the information is kept in strict confidence.

Press "next" to start with this questionnaire.



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A Look At Performing Group Online Coaching

As you might imagine, online coaches find it convenient to send and receive resources and assessments online. However, as your client list and toolbox expand, sending and receiving via email can get unwieldy.

If you want to stay on top of your online practice and keep organized, you'll want to look into the digital options available to help you with your coaching practice.

Check out our [Ultimate Guide to Online Group Coaching](#) for the most useful advice, strategies, and templates you can use.

Tools For Your Coaching Practice

In this section, we'll go over why you should use digital tools and which options might be best for you.

Why Use Digital Tools In Your Practice?

First, let's answer the question that many new coaches have: "Why do I need digital tools?"

While there are many things you can accomplish with nothing but an email address and a webcam, it's tough to make a streamlined, professional business with such limited tools. Today's coach needs to be ready to handle more interaction, more dialogue, and more work!

Fortunately, there are many, many tools available to help coaches be more organized and more effective.

Best Platform and App For Your Business

The best tools for your practice will depend on you and your clients' specific needs. You may want to choose one "do it all" platform or mix and match with several different apps that meet different needs.

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You have tons of options for just about every task that you need to tackle, including tools for:

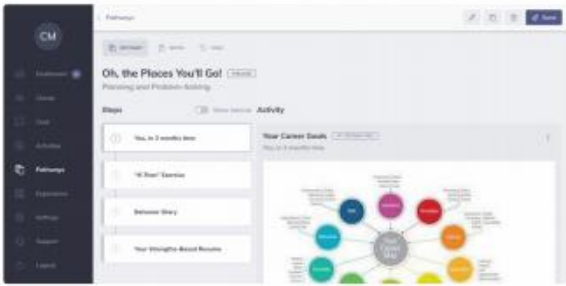
- Scheduling sessions or appointments
- Video chatting with clients
- Messaging or texting clients
- Sharing resources
- Sending and receiving forms
- Working collaboratively with clients
- Billing and invoicing (CRM)
- Progress tracking
- Monitoring and evaluation

In all of these categories, there are several options available that could meet your needs. The hard part is figuring out exactly what your needs are and choosing the tool that best meets them!

However, there is one tool that is an excellent choice for just about every coaching practice, since it meets a need that virtually no other tool does: [Quenza](#).

How To Use The Quenza Software

Quenza was designed with coaches in mind. It offers independent professionals a way to keep in touch with their clients, work through exercises and assessments together, and keep their clients engaged in between sessions.



With Quenza's unique tools, you can design your own custom content, including branded questionnaires, exercises, assessments, journals, worksheets, reflections, meditations, and more. Then, you can design programs, packages, and courses using Pathway tools (as pictured).

You can use Quenza to design your own custom content, including questionnaires, exercises, assessments, reflections, and more.

You can also organize your content into pathways to engage your clients with the right resources at the right time.

Aside from the valuable content sharing, you can also use Quenza to take and store client and session notes, chat with your clients, and monitor their progress. You can do all this from the handy dashboard, the client profiles, and the library of activities.

8 Tools and Features Included In Quenza

You can do all of this through these eight valuable tools and features:

- 1 Drag-and-drop Activity builder:** this is where you can design your own activities, assignments, assessments, and even courses. It's user-friendly and offers tons of customizability.
- 2 Pathway builder:** you can use the pathway builder to design unique pathways of activities to guide your clients through your custom-built or adapted activities. Create as many pathways as you'd like to meet your clients' needs.
- 3 The Expansion Library:** if you need some ready-made activities to drag and drop into your pathways, or if you want to find a template that you can customize to your needs, the expansion library has got you covered. It has tons of activities, exercises, and other resources to choose from.
- 4 The Chat:** you can use Quenza's chat to keep in touch with your clients anytime, anywhere. You can even turn the feature on or off for each client.
- 5 The Client Profile:** this is a handy way to keep client information organized and in one place. Keep your notes, contact info, and other information easily at hand with the client profiles.
- 6 Quenza Notes:** take notes on clients and sessions, and keep them private or share them with clients as needed to collaborate.
- 7 Quenza Groups:** if you're working with groups of clients, like a full team within an organization, the Groups function will help you keep everyone organized and on the same page.
- 8 The Client App:** the client app is a great tool for keeping clients engaged and on track. It's currently offered in 16 languages and allows clients to easily communicate with you.

3 Handy Templates For Online Coaches

Coaching Client Agreement

This Coaching Client Agreement (hereinafter "Agreement"), is made effective by and between the following parties:

Your Name

hereinafter referred to as "Coach," and

Client first name Client last name

hereinafter referred to as "Client".

Quenza's Coaching Client Agreement can be customized to outline all the important points of your unique coaching services, clarifying expectations for your clients.

If you're interested in the kinds of exercises and assessments you can access with Quenza, we describe a few below:

- 1 Coaching Client Agreement:** this template, shown above, is a great place to start with new clients, as it can be used to outline all the important points of your coaching relationship: what you expect from them, what they can expect from you, your policies and procedures, etc.
- 2 Wheel of Life:** the Wheel of Life is a popular tool to help you determine how satisfied your client is with the different domains of their life. It walks clients through rating each domain, then through some critical thinking about what domains they may want to work on and what they can do to improve their satisfaction.
- 3 Wheel of Needs:** like the Wheel of Life, this exercise visualizes the user's needs as a wheel with several "spokes" for the domains (like safety, work, and rest). It will walk the user through identifying how their needs are being met in all 10 domains, targeting their lowest scoring need, and coming up with an action plan to address it. Check out the preview of this exercise below.

Wheel of Needs

Introduction

Dear Client first name

In this exercise, we are going to explore your needs. A need is something that is necessary for you to live a healthy and happy life. Examples of needs include, rest, safety and autonomy.

Negative emotions generally indicate that our needs are not being satisfied (enough), while positive emotions signal that needs are satisfied.

When you are struggling with negative emotional states such as anxiety, depression, or feeling lost or unmotivated, it may help to explore how satisfied—or not satisfied—your basic psychological needs are at this time in your life.

In this exercise, we are going to explore your needs and work towards meeting the needs that are unmet.

Please press "next" to start with this exercise.



Next >

This customizable "Wheel of Needs" Quenza Expansion explores your clients' needs and facilitates their work towards meeting the needs that are unmet.

3 Best Games and Online Coaching Activities

If you're looking for challenging or engaging activities to keep your clients on track, Quenza has lots of options.

For example, these three exercises, part of the Quenza Activity Library, can be used or adapted as needed for your practice:

- Motivational Vision Board:** this exercise is hands-on and sure to keep your clients engaged. It walks them through the creation of a meaningful motivation board, a personal collage of images, photos, illustrations, words, and any other visual cues that represent the achievement of their goals.
- Progressive Muscle Relaxation:** this multimedia activity (shown below) will walk the user through a deep relaxation technique, helping them to relax their body in stages. It can reduce stress and anxiety, relieve insomnia, and even reduce chronic

pain.

- **Best Possible Self:** this fun exercise involves the user imagining themselves at a potential future date, when everything has worked out for them in the most optimal way. It's motivating, engaging, and illuminating for your client, and you can discuss the results with them afterward.

< Expansion activities

Progressive Muscle Relaxation

Progressive Muscle Relaxation

SECTION 1


Introduction

Dear [Client first name],

In this exercise, you will practice progressive muscle relaxation.

Progressive muscle relaxation is a deep relaxation technique that has been effectively used to reduce stress and anxiety, relieve insomnia, and reduce symptoms of certain types of chronic pain.

Press the "next" button below to start.



The "Progressive Muscle Relaxation" tool walks a client through a deep relaxation technique, helping them relax their body in stages.

How To Start Your Online Coaching Business

It can be tough to get started with online coaching. You might feel unsure about what you need, what items are on the to-do list, and where to go for support.

If this sounds like you, read on—this section is here to help.

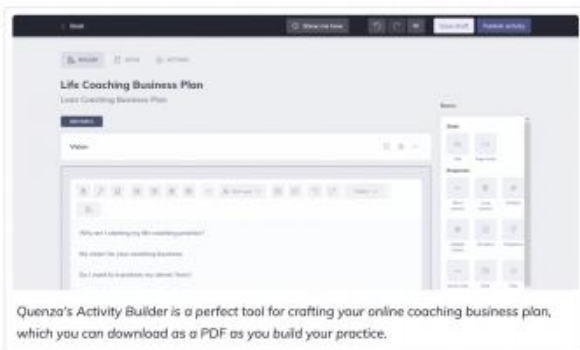
Starting Your Online Coaching Business

Like starting any business, starting an online coaching business requires a good deal of forethought. Take the time at the beginning to consider your needs, specify your goals, and determine the resources that will help you along the way.

Here are some concrete steps you can take:

- 1 **Set clear goals.** Think about the details, like your target income, how many hours you plan to work each week, etc. Also consider the big picture: what kind of impact do you want to make on the lives of your clients?
- 2 **Know your target market.** Take the time to get to know your clients, their lifestyle, their pain points, and the goals you will help them achieve.
- 3 **Differentiate yourself.** Think about how the service you offer differs from what else is available in the coaching marketplace. Identify the unique strengths of your services.
- 4 **Create a signature coaching program.** Based on your service's strengths, design a unique, effective program that will meet your clients' needs.
- 5 **Determine your pricing.** Think about your target market and what your offer will be worth to them. Set a price that you think will work for your practice.
- 6 **Find your clients.** Use your existing network to spread the word first, then consider things like advertising and further networking.
- 7 **Create front-end products or "upsells".** These products are smaller, more affordable versions of your program (like e-books or short courses), designed to generate leads or add value for current clients.
- 8 **Scale up your coaching management.** This step is iterative and will help you continue to manage your growth as your practice continues to expand. Stay on top of changes and trends in your field, and be open to new tools, techniques, and resources.

Crafting A Business Plan and Model



One of your first steps in **starting a coaching practice** is to create a business plan and develop a framework or model of how your practice will work.

As you get started drafting your business plan, make sure that you are creating a document that helps you:

- 1 **Clarify your "Why"** – it should illustrate the ultimate purpose of your practice, the results for your clients and for yourself.
- 2 **Solidify your "How"** – it should outline your overall mission and your objectives, along with any milestones and the methods you intend to use to reach them.
- 3 **Determine your "What"** – it should identify the interventions, tools, resources, exercises, etc., that will help your practice reach its goals.

Brainstorming Your Business Name: 5 Ideas

Choosing the name for your business is as personal a process as the resulting name will be.

There's a lot to think about when naming your practice, including how it will sound to your potential clients, whether it's recognizable, whether it's different enough from other, similar businesses, and more.

However, if you are in the brainstorming stage and need a little **creative push**, here are 5 ideas:^[4]

- 1 Use a thesaurus to find tons of synonyms and related words.
- 2 Comb through glossaries or slang dictionaries, specifically any related to your industry.
- 3 Incorporate an internet search (like Google) to spark new ideas based on popular associations.
- 4 Search through popular music for related words or phrases to get new ideas.
- 5 Browse photos (like stock photos, Google images, etc.) to spark ideas based on images.

Marketing and Advertising For Your Practice

Although it's generally a good idea to first use your current network to find initial clients, there will come a time when you need to use other means to **get new clients**.

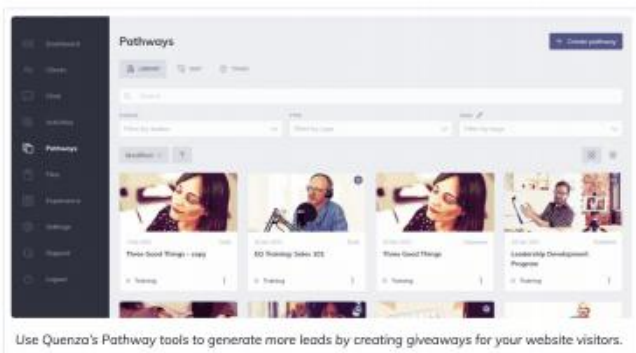
When you reach that point, consider using organic marketing before jumping into paid advertising.

Organic strategies include:

- **Guest blogging:** share content that will be helpful to your ideal audience on other websites to build up your reputation and get your message out.
- **Social media:** use the platform (or platforms) where your ideal audience spends the most time and invest in some thoughtful posting.
- **Podcasting:** start by being a guest speaker on shows that appeal to your ideal audience, and maybe even start your own podcast.
- **Online communities:** identify online communities where your ideal audience spends time and engage with them there.

Email marketing, build up an email list and keep your audience informed on your practice and how you can help them.[5]

Building An Unforgettable Coaching Website



No matter how you attract new clients, one thing is for sure: you will need to have an engaging and user-friendly website for your coaching business.

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When you build your website (or contract out to an expert), make sure it has these 10 things at a minimum:

- 1 **Home page:** the most viewed page, it should summarize the content you have available.
- 2 **About Me:** potential clients can use this page to get to know you and your credentials and experience, as well as a little bit about your personality and coaching philosophy.
- 3 **Services:** list and describe the different services you offer.
- 4 **Contact:** make it easy for potential clients to reach out and get in touch.
- 5 **FAQs:** answer any questions you think your readers may have before they ask; you may want to address things like fees, confidentiality, ethics, and the structure of your sessions.
- 6 **Client testimonials:** this is a great way to build confidence in potential clients.
- 7 **Lead magnet:** offer something small for free in exchange for your potential client's email address, like an e-book or short course.
- 8 **Blog and resources:** increase the authority of yourself and your website, and show that you're an expert in this domain.
- 9 **Books and store:** showcase your books and/or other products for sale.
- 10 **Promotion or complimentary session:** use your potential client's visit to your website to hook them with a free sample of your services.

How To Become An Online Coach

You probably have a good idea about how you want to coach and run your practice, but you may still be wondering how to get to that point.

What do you need to do to become a coach and start practicing?

This section will walk you through it.

What Qualifications Do Online Coaches Need?

Coaching is a big, dynamic field with a lot of niches, so it's hard to pinpoint specific qualifications that you will need to become an online coach. A lot will depend on what type of coaching you want to do and in what area.

Generally, your qualifications will come from things like holding a degree in your area of expertise.

However, there are some foundational training opportunities and certifications that will set you apart from others as a professional and high-quality coach.

Training in Online Coaching: Best Degrees

If you're looking to become an online coach, make sure you have a degree that works for you.

A bachelor's degree that is related to your coaching area is often considered to be the minimum qualification, but a master's degree or higher will give added credibility to you as a coach.

If you're looking to get training specific to coaching itself, there are many options available, but they tend to result in certifications rather than degrees.

3 Certifications, Courses, and Programs

The best options available for training and **certification in coaching** are those endorsed by the International Coaching Federation (ICF). The ICF is a membership organization for trained professional coaches that has been around for over 25 years. It is a highly respected organization that accredits training programs for coaches.

They offer three levels of credentials:

- 1 **Associate Certified Coach (ACC) credential:** requiring a minimum of 60 hours of coach-specific training, 100 hours of client coaching experience, and 10 hours of mentor coaching.
- 2 **Professional Certified Coach (PCC) credential:** requiring a minimum of 125 hours of coach-specific training, 500 hours of client coaching experience, and 10 hours of mentor coaching.
- 3 **Master Certified Coach (MCC) credential:** requiring a minimum of 200 hours of coach-specific training, 2,500 hours of client coaching experience with at least 35 clients, and 10 hours of mentor coaching.

There are many options for obtaining your coaching training that will count towards the requirements above. The ICF offers an education search service to help you get started on finding the right training for you.

Final Thoughts

It takes a lot of time, effort, and planning to get your coaching practice off the ground. It may not always be an easy road, but the many successful independent coaches will tell you it's well worth the investment.

Check back here for more information, tips, and tools to help you start, grow, expand, and improve your coaching practice. And if you want to turn some of this theory into practice, don't forget to start your **1 dollar trial of Quenza today!**

Happy coaching!

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