



**RISE COACHING LLC.**

# **Rise Coaching Agency**

2021 Operating Procedures



# **STANDARD**

## **OPERATING PROCEDURES**

Each of these steps must be completed to ensure that all clients are being communicated with, supported and receive the best client experience. Providing a seamless client experience helps Rise to sustain its reputation of quality service and allows you to grow your business as well. Each step is to be completed in the order listed and notes should be recorded where applicable to provide full transparency to your direct agency leader.

# STEP 1



## Lead Capture

# STEP 2



**Phone call within 4 hours**

# STEP 3



**Schedule Consultation**  
**Send Text to confirm call**  
**Schedule follow up call**

# STEP 4



**Record call notes**  
**Consultation date/fee**

# STEP 5



**Record consultation notes**

# STEP 6



**Send contract/invoice  
via Honeybook**



# STEP 7



**Record invoice fulfillment date**

# STEP 8



## **Send Welcome Email**

**cc: [admin@risecoachingagency.com](mailto:admin@risecoachingagency.com)**

**Include link for orientation call**

**Include survey link**

# STEP 9



**Add client to conversion list**

# STEP 10

## **Host orientation call** **(PLEASE RECORD)**

# STEP 12

**Schedule weekly sessions**  
**(ADD TO SHARED GOOGLE CALENDAR INVITE)**

# STEP 13

**Record session notes in Google docs**  
**Add all session notes to Asana**  
**(SHARE LINKS WITH CLIENT VIA EMAIL)**

# STEP 14

## **Final Survey**

# STEP 15

## **Company Follow up Call** **Lanasia Angelina (for now)**