BONUS THREE · YOUR MOMENTUM STARTS HERE

The First Win Playbook

Which Specialist Should You Activate First?
Match Your Situation to Your Fastest Meaningful Result

Six starting points. Six word-for-word briefs.
One win in your first week.

KAREN CAPPELLO, MCC | KARENCAPPELLO.COM
The Client Acquisition Department for Coaches

A WORD BEFORE YOU BEGIN

Where Does Your Business Need Momentum First?

You now lead fourteen specialists and a Chief of Staff. The temptation — especially for a high achiever — is to activate everything at once. Please don't. Exceptional leaders sequence. One specialist, one win, then the next.

This playbook asks you one coaching question: which of the six situations on the following pages sounds most like your business today?

Find yours. Activate that one specialist. Copy the opening brief word for word, and complete the 48-hour win before you touch anything else. Momentum is built exactly this way — one meaningful result, delivered quickly, then compounded.

HOW TO ACTIVATE A SPECIALIST

Open a new chat in Claude and begin your message with the specialist's name — for example, "Use my Follow Up Manager skill..." — then paste the brief. That's the entire technique. Brief, review, refine, send.

IF TWO SITUATIONS BOTH SOUND LIKE YOU

Choose the one closest to revenue. Stalled conversations outrank quiet pipelines; quiet pipelines outrank unclear messaging. Your Chief of Staff can settle any tie in one question.

SITUATION ONE

1 "My pipeline has gone quiet."

Does this sound like you?

The calendar has open space where enrollment conversations used to be. You know plenty of people — former colleagues, past clients, admirers of your work — yet reaching out feels awkward without a reason. What would happen if reconnecting felt gracious instead of promotional?

YOUR FIRST SPECIALIST: Your Relationship Manager

Your opening brief — copy it word for word:

"Use my Relationship Manager skill. I'm a coach reconnecting with my professional network. Ask me for five people I've been meaning to reach out to and what I know about each. Then draft a warm, personal reconnection message for each one — no pitch, just genuine reconnection that naturally opens the door to a conversation."

YOUR WIN WITHIN 48 HOURS

Five personal messages, sent. In most networks, two or three replies arrive within days — and one usually becomes a conversation. Your pipeline is officially awake.

SITUATION TWO

2 "My conversations went quiet."

Does this sound like you?

The conversation went beautifully. They said they needed to think about it. That was two weeks ago — or two months. Following up feels like pestering, so the opportunity sits in silence. What if your follow-up added value instead of pressure?

YOUR FIRST SPECIALIST: Your Follow Up Manager

Your opening brief — copy it word for word:

> *"Use my Follow Up Manager skill. I have three prospects who expressed genuine interest and then went quiet. Ask me about each conversation — what we discussed, what mattered to them, how long it's been. Then draft a warm, service-oriented follow-up for each that reopens the conversation with grace."*

YOUR WIN WITHIN 48 HOURS

Three follow-ups, sent. Stalled conversations are your fastest path to revenue — these are people who already know and want your work. One graceful nudge is often all a golden opportunity needs.

SITUATION THREE

3 "People don't quite understand what I do."

Does this sound like you?

At gatherings, you explain your coaching and watch polite nods. Referrals arrive rarely, and when they do, they're not quite right. If your ideal client heard you describe your work in one sentence, would they recognize themselves immediately?

YOUR FIRST SPECIALIST: Your Messaging Strategist

Your opening brief — copy it word for word:

> *"Use my Messaging Strategist skill. Ask me who I serve, the urgent challenge I solve, and the transformation I deliver. Then craft three versions of a clear, compelling one-liner premium buyers instantly understand — one for conversations, one for my LinkedIn headline, one for introductions."*

YOUR WIN WITHIN 48 HOURS

A message you can say out loud without flinching — installed on your LinkedIn profile and ready for your next introduction. Clarity is the quiet engine of referrals.

SITUATION FOUR

4 "I have an enrollment conversation coming up."

Does this sound like you?

Someone promising is on your calendar this week. You're an excellent coach — and still, the moment the conversation turns to working together, something tightens. How would you show up if you walked in fully prepared?

YOUR FIRST SPECIALIST: Your Conversation Coach

Your opening brief — copy it word for word:

> *"Use my Conversation Coach skill. I have an enrollment conversation on [day] with [first name], a [role] interested in [what they want]. Help me prepare: the questions that will serve them most, how to present my offer naturally, and how to invite a decision with confidence and grace."*

YOUR WIN WITHIN 48 HOURS

A one-page preparation you review the morning of the call — and a conversation that feels like coaching, not pitching. Follow with your Proposal Writer the same day, while the energy is warm.

SITUATION FIVE

5 "I suspect I'm undercharging."

Does this sound like you?

Clients say yes quickly — sometimes too quickly. The fee you quote is the fee you inherited from your first year, not the one your results deserve. What would you charge if you priced from the transformation you deliver rather than the hours you spend?

YOUR FIRST SPECIALIST: Your Pricing Strategist

Your opening brief — copy it word for word:

> *"Use my Pricing Strategist skill. Ask me about my current offer, my fees, the results my clients achieve, and the corporate seniority of the people I serve. Then recommend a premium pricing structure — with the positioning language that helps the right buyers confidently invest."*

YOUR WIN WITHIN 48 HOURS

A new fee, a reason to believe it, and the exact words to present it. Your very next enrollment conversation happens at your new number.

SITUATION SIX

6 "I'm invisible to the people I could serve."

Does this sound like you?

Your ideal clients scroll past every day without knowing you exist. You've considered posting consistently — then Tuesday arrives and the page stays blank. What becomes possible when a week of visibility takes thirty minutes to prepare?

YOUR FIRST SPECIALIST: Your Content Director

Your opening brief — copy it word for word:

> *"Use my Content Director skill. Ask me about my ideal client, my point of view, and the transformation I deliver. Then plan my first two weeks of thought-leadership content — topics, angles, and a draft of the first three posts in my voice."*

YOUR WIN WITHIN 48 HOURS

Three posts drafted and the first one published. Visibility compounds: the leader who posts this week is the one remembered when the need arises next month.

AFTER YOUR FIRST WIN

Report Back. Then Compound.

When your 48-hour win is complete, return to your Chief of Staff and report in — exactly as your best people once reported to you:

> *"Use my Chief of Staff skill. My first win is complete: [what you did and what happened]. Based on where my business stands, what's the next most important thing to move forward?"*

Then protect the rhythm: thirty minutes each Monday with your Chief of Staff — your Monday Morning Department Meeting (Bonus 5) — and one specialist activated at a time. Significant progress in a coaching business rarely looks dramatic. It looks like this: a clear priority, a good brief, a shipped result. Week after week.

So — which situation is yours, and what will you delegate in the next ten minutes?

Love and great joy,