



Part I, Chapter 1

Welcome to The Five O'Clock Club

Guild Certification Program

We commonly say to job hunters: “The Five O’Clock Club is like a graduate course in job search, so study the books as if you were in graduate school.” We know that mastering our proven, research-based methodology is one of the keys to having a speedy, successful job search.

You are reading these pages because you have applied to become a Five O’Clock Club coach, part of our faculty to teach the course—otherwise known as the Guild of Career Coaches. The Guild is made up of career professionals who are committed both to coaching the Five O’Clock Club way and to helping grow the Club. Hence job hunters will look to you as masters of the methodology.

The steps in the certification process that we ask you to complete are designed to:

- help you achieve full command of the Five O’Clock Club methodology and protocols
- enhance your skills as a career coach in one-on-one sessions with clients
- enhance your skills as a career coach leading small-group strategy sessions
- enhance your skills as a public speaker
- make you a better marketer of career services
- prepare you to receive 5OCC client referrals for an additional income stream for your private practice.

No matter what your level, we believe that you will benefit from the certification process. Of course, people who are entering the field will find that the Five O’Clock Club coaching framework offers a solid *practical* foundation for going forward in their coaching careers. But we have been gratified over the years to hear seasoned career coaches rave about the Five O’Clock Club program and process. No matter how much experience you have, you will be a *better* career coach if you master the Five O’Clock Club method.

Your learning will be facilitated on four levels:

- by reading our books and this manual
- by listening to lectures (those recorded by Kate Wendleton, founder of the Club and author of the books, and those delivered in person at the Club branches in Manhattan)
- by attending coaching sessions—hearing

(and, if you are in the New York area, watching) our trained coaches help people strategize their searches

- by participating in teleclasses

There are, in fact, eleven steps in the certification process after you have been accepted for the program. There are a few more that should be done as soon as certification is complete. Please bear in mind that the steps described below are **not in chronological order**. You will find yourself working on several of the steps simultaneously.

Step One: Attend Six Teleclasses

The teleclasses are designed to offer structure and encouragement as you work your way through the self-study certification program. They are also an opportunity to bond with others in the training process. The six classes are held every other week, on a weekday evening, on a quarter-calendar basis; that is, the First Quarter Module is January through March, Second Quarter is April through June, etc. The teleclasses last 50 minutes and are always recorded. These recordings are available by Internet link within a day or two. Obviously, however, the greatest benefit comes from participating in these interactive classes, but listening later is the next best thing.

The topics of the six classes are as follows:

1. An overview of the Certification Process: Introduction and Q & A.
2. How to line up speeches to promote your private practice and the Club
3. A Session on Test One: Q & A
4. A Session on Test Two: Q & A
5. How to lead the weekly strategy sessions for job hunters, the Five O’Clock Club way
6. How to deliver a speech for maximum impact for your private practice and the Club

Please note that you may start the certification program **at any time** during a calendar quarter—you don’t have to wait until the start of the next quarter. In other words, when you start, teleclass three or four might be the next one. It’s okay to dive right in. The recordings of the classes you missed are available via Internet link, and you are welcome to participate in the classes you

missed when the quarterly rotation begins again.

- **Step One Learning Goal:** these classes are intended to create a framework for moving forward in the certification program—and, we hope, expedite the process for you.
- The first class will help your understanding of the entire certification process.
 - Class two is a brainstorming session with your fellow Guild trainees on speech marketing; it is a practical how-to session on the best ways to get speaking engagements.
 - Classes three and four provide guidance with the required written tests.
 - Class five will help you grasp the function of the coach in leading the weekly small group strategy sessions.
 - The final class covers the basics of becoming a brilliant, effective presenter.

We cover speech marketing early in the syllabus (teleclass two) to help give you a head start on accomplishing Step Ten in the Certification Program (booking and delivering two speeches).

Step Two: Read the Two Certification Tests

The two tests will be emailed to you as Word attachments within 24-hours after you have paid for the certification program (or by the end of the next business day). Save the attachments, using your name in the title of the saved document, e.g., Foster, Anthony, TestOne.doc. The focus of Test One is the Five O’Clock Club coaching methodology. The focus of Test Two is the marketing of a private practice, especially giving speeches to gain exposure in one’s target markets.

- **Step Two Learning Goal:** By asking you to read the tests at the outset, we hope that they will be a guided learning tool. In other words, we are guiding you to the key concepts that we wish you to learn. Hence you can be on the lookout for these key concepts as you read the books and the *Coach Training Manual*, listen to the CDs, and audit/observe live coaching sessions.

Step Three: Download, print and begin reading the available chapters of the *Coach Training Manual*.

These chapters can be found at the *Coaches Only*

Section of our website:

www.fiveoclockclub.com/Guild For both the User Name and Password, type ‘Guild’. The ‘G’ must be capitalized.

We advise putting these chapters into a three-ring binder. If you prefer to go paperless, save each chapter *separately* in a computer file called Guild Coaches Training Manual.

- **Step Three Learning Goal** These chapters are the Guild User’s Manual—the inside scoop on how to understand and deliver the methodology and how to lead the weekly small group strategy sessions. All of the protocols for receiving Five O’Clock Club retail and outplacement clients are covered, as well as the fundamentals for marketing and maintaining a thriving private practice.

Step Four: Read the Four Primary Five O’Clock Club Books

Begin the process of *mastering* the books:

- *Targeting a Great Career*
- *Packaging Yourself: the Targeted Résumé*
- *Shortcut Your Job Search: the Best Ways to Get meetings*
- *Mastering the Job Interview and Winning the Money Game*

In all likelihood you are already well under way with the books. Of course, don’t wait until you’ve finished the books to proceed with the other steps.

Read the books on an on-going basis. You need to get to know these books like the back of your hand. Clients may ask you about almost anything in these four volumes—so your familiarity with them should be obvious to any job hunter. Put yourself on a schedule to work through all four books—more than once. As was mentioned earlier, one of our mantras to job hunters is: study the books as if you were in graduate school. They will look to you as authorities on these texts. It’s not a bad idea to put labels on *your own* copies of the books, MY STUDY COPY. Underline key passages and make notes in the margins.

Obviously the books were written to convey our methodology to clients; they are the embodiment of the Five O’Clock Club coaching product. But we have stressed repeatedly over the years: **The books were written to support the coaches.**

What do we mean by this?

- It gives *you* credibility to tell your audiences, workshops and private clients: “I am certified in the Five O’Clock Club method explained in these books.”
- To say *I’m Five O’Clock Club certified* means you have moved beyond generic career coaching: you represent a specific product and brand name that the books explain.
- The brand name appears prominently on the covers of all the books, and, as soon as you become certified, the brand name should be added to your business cards, brochures, stationery, website, etc. (i.e., “Anthony Foster, Certified Five O’Clock Club Coach”).

You can benefit by identifying yourself very clearly with the books.

By reading and absorbing the books, and using the methodology in your private practice, you will know the product *cold*.

A word to the wise: **do not slight the résumé book**. Seasoned coaches especially tend to have confidence in their own way of doing résumés—perhaps more out of habit than anything else. We see the résumés that seasoned coaches present to us, and are shocked to read the conventional résumé verbiage that sounds good, but does nothing to differentiate clients; commonly the verbiage serves as a substitute for clarity and precision about quantifiable accomplishments.

But there **is** a Five O’Clock way to do résumés, based on 25 years of research on *what works*. **Individual coach opinions about how to do résumés other than our way don’t count**. When you represent the Five O’Clock Club coaching product **to clients referred to you by the Club**, you must be a master of our product, **including résumés**. (See Part II, Chapter 7, “The Five O’Clock Club Protocols for One-on-One Coaching.”)

- **Step Four Learning Goal**: to lay the foundation for becoming one of our methodology specialists.

Step Five: Listen to the 16 Recorded Lectures

When we established our teleconference branches in February 2000, we had to have a new way to offer the

weekly lecture that is delivered during the first hour at our in-person branches in Manhattan. Kate recorded 16 lectures (8 CDs, each lecture about 35 minutes) that cover the methodology from start to finish. All clients who buy teleconference branch sessions (the Insider Program) receive the recorded lectures. And they are part of your training materials. **You should listen to them repeatedly**. One West Coast client reported that he listened to all 16 lectures *four* times. He had a 40-minute commute to work, and just kept the CDs going in his car stereo. Back in the days when the lectures were on tapes, one of our teleconference coaches ordered a second set of tapes: she’d worn out the first set! Listening to the lectures repeatedly helps achieve a grasp and mastery of the whole Five O’Clock Club methodology. Go ahead, rip them onto your iPod!

- **Step Five Learning Goal**: as with the books, to lay the foundation for becoming a methodology specialist; but also to add to your skills as a public presenter. These talks can serve as a template for speeches.

Step Six: Observe/Audit 10 Coaching Sessions

If you are near New York, you may observe the small group sessions in person in Manhattan.

- The Monday night branch meets at the Roosevelt Hotel at 45th Street and Madison Avenue.
- The Wednesday night branch meets at 11 Penn Plaza, on Seventh Avenue between 31st and 32nd streets (right across from the entrance to Madison Square Garden), 5th Floor.

Both meetings begin at 6:30, and end between 8:30 and 8:45. Observing in New York will give you an opportunity to hear five or six coaches in the lecture rotation, and to see the group coaching in person.

If you are not near New York, you will be auditing the teleconference sessions. These meet every week-night except Friday. As soon as you have begun the certification program, you will receive an email with full information for dialing in to any of the Insider Branch groups.

It’s a good idea to keep a record of your audits/observations, but you **must** also notify the home office by email after each audit/observation. A one-sentence message is sufficient: “Monday March 8, I audited Bert

Marro's group." This email should be sent to the Guild Director or his/her assistant.

We recommend that, at the end of each session, you jot down a few notes about the experience. If you are observing in person in New York, we ask that you NOT take notes during the small group sessions (taking notes during the first-hour lecture is okay). Since clients are discussing the confidential issues of their job searches, it might be unsettling to see a non-participant taking notes. Of course, if you are auditing a teleconference session, you may take notes at any time. **THE NOTES ARE IMPORTANT FOR COMPLETING STEP SEVEN DESCRIBED BELOW.**

The Strict Protocols for Auditing/Observing

You are being allowed to observe real coaching with real people. The coach is working hard to get a tough job done within 60-70 minutes. **Your role is not to help, but to learn.** Hence we ask you to abide by the following rules:

- Of course, your presence will not be a surprise, because the branch head and the administrator have been notified by the home office that you have been scheduled as an observer. Even so, when you are observing an in-person branch for the first time, introduce yourself to the branch head and group leader as a coach-in-training, and the following week or two remind them who you are. If clients ask who you are, simply say that you are an observer. You can say that you are training to become a 5OCC coach, and you're there to see how it is done.

Other than that, we ask observers **not to speak to clients before, during or after the meeting.** Even if you feel you have good—or better—advice to give, **please don't.** Do your best to **be invisible.**

- Try not to get too caught up in each individual's job search—as fascinating as they may be. **You are there to watch the coach.** You are being given a unique opportunity to observe a master coach in action. What is he or she doing to **keep the session strategic?**

- We insist on the 'vow of silence' as well when you listen to a telephone group. When you are planning to audit a teleconference group, be sure to email the coach in charge that you plan to dial into his or her group. If a recorded voice asks you to state your name and press the

pound or star key, **don't** state your name—just press the pound or star key. That way, the coach will know you're on the line (you alerted the coach by email that you would be attending), but no one else will. Violating the vow of silence will irritate the coach. **You want to make friends with the coach.** Some of them have shown extraordinary generosity in terms of mentoring coaches-in-training.

- At a physical branch, sit slightly outside the circle. Make sure all clients have seats before you take a place at the table. Move slightly away from the table, so it is obvious you are not part of the group.

- If you wish to become a group coach yourself, you may be invited (usually after the minimum of 10 sessions) to co-coach with one of the group leaders. Then, of course, you take your cues from the group leader when to speak up. Co-coaching is a way to prepare for becoming a substitute or full-time coach.

- Of course, you must do your minimum of 10 observations, even if you don't intend to lead groups someday. But you are welcome to observe/audit on an on-going basis. Do 20 or 30 if you want. There is no additional charge. Watching our coaches over and over as they apply the 5OCC methodology with clients in real job-hunt situations will sharpen your coaching skills immeasurably. Where else will you get this chance? You will be assigned to rotate from group to group, to see how coaches with different coaching *styles* convey the methodology.

- **At our physical branches, cell phones should be turned off and out of sight from the moment you arrive for the evening until the moment you leave.**

- For those of you who do your observations in New York, other than greeting the branch head or administrators, please don't ask them questions—other than confirming which group to observe—or make it an opportunity to have a chat with them. It's not that they're unfriendly, but they're focused on taking care of business. They don't want unnecessary distractions: they are preoccupied with clients arriving and signing in, confering with the group leaders—or thinking about the presentation if it's their turn to give the lecture.

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- **Step Six Learning Goal:** to grasp the hard work required to keep the 60 or 70-minute group session **strategic**. There are four chapters in the *Coach Training Manual* (Part II, chapters 3, 4, 5, & 6) about how to run our groups the Five O’Clock Club way, but watching/listening to the coaches actually doing it is invaluable.

Step Seven: Write a 500-750 word Essay on Your Observing/Auditing Experience

In working with clients for many years we have stressed the importance of *writing* the Seven Stories and *writing* the Forty-Year Vision. *The act of writing helps concepts gel*. Putting your comments and thoughts into writing can help you achieve a firmer grasp of the observing/auditing experience. Among other things, you could comment on the importance of sound methodology in career coaching and what you have learned about running groups the 5OCC way. We are not asking you to—we do not *want* you to—critique the coaches.

Especially if you want to be in the queue to lead groups, your essay will help us evaluate your grasp of the group process. If you find you have a lot to say and want to exceed 750 words, please feel free to do so.

- **Step Seven Learning Goal:** to solidify your understanding of the vital role that the weekly strategy groups play in moving job hunters forward—as well as what the coach is going through during this ‘hardest hour of the week.’

Step Eight: Complete the Two Written Tests

Type your answers in the Word documents that you received when you started the certification program. When you are finished, email the tests back to the Guild Director or his/her assistant. **Please do not handwrite the tests,**

The tests are open-book and essay format.

If you have read the tests several times at the outset (see Step Two above), you will be on the alert for key ideas and concepts as you work through the various steps of the certification process.

The tests will be graded by the Guild Director and will be returned to you by email with his/her corrections, comments and suggestions. You will be notified by email as soon as the tests have been graded. Copies of the tests will be kept in your permanent file at the Club home

office.

It is not uncommon that people answer questions incorrectly. On minor points, corrections or suggestions are simply written on the test itself. On major points, the Guild Director will schedule a time to meet with you (in person or by phone) to discuss the aspects of Five O’Clock Club methodology or procedures that you haven’t fully grasped.

A word to the wise: Stages 1, 2 & 3 and—to a lesser degree—Targeting, seem to give our coaches-in-training the most trouble. Both are **absolutely fundamental** aspects of Five O’Clock Club method. You will not be able to coach Five O’Clock Club referrals properly without **mastery** of these concepts. Make sure you study Stages 1, 2 & 3 and targeting thoroughly before you write your answers to questions relating to these two concepts.

Another word to the wise: don’t skimp on your answers. You may be tempted to cover a topic in a sentence or two, while knowing that you could say more. We would prefer that you say more, if it will help us see that you have grasped the methodology thoroughly.

- **Step Eight Learning Goal:** to anchor firmly in your mind the full range of the Club’s methodology, and our recommendations for building a strong private practice.

Step Nine: Five O’Clock Club Résumé Preparation

When Five O’Clock Club clients are referred to you for help, they will expect their résumés to be transformed. In content and format, they will expect a match between the résumés shown in the books and *their* new résumés. Especially in the case of seasoned career coaches who become certified, we see a tendency to slight or ignore the Club’s approach to résumés.

There are two ways to complete this step.

(1) We will email you two inferior résumés to rework into Five O’Clock Club format. Imagine that these résumés belong to people who have come to you for help. Imagine further that you have coaxed information from them based on the Seven Stories, and have come up with clear job targets for them. And then rewrite the résumés as they should be, according to Five O’Clock Club principles. You **do** have to be creative in redesigning the résumés, that is, it may seem strange to rework résumés for clients whom you have not met and helped through the assessment process. So you are encouraged to give

your imagination free reign.

(2) You may also fulfill this résumé requirement by submitting to us a *real* ‘before’ and ‘after’ résumé. Show us how you have helped a client transform a ‘boring, history lesson’ résumé into a well-positioned, well-targeted résumé—full of clearly stated, measurable accomplishments and *free of jargon*.

The résumés are graded by Kate Wendleton. They must be submitted as email attachments to the Guild Director or his/her assistant. Kate will review them and type her suggestions, modifications and corrections onto the documents, which will be emailed back to you. It sometimes happens that there are so many changes to be made that we ask the Guild trainee to submit another ‘after’ résumé for Kate’s review.

We realize that mastering the Five O’Clock Club approach to résumés is an ongoing process, and we invite you—even after you have completed certification—to submit client résumés that you are working on to Kate for her review and suggestions.

- **Step Nine Learning Goal:** to enable you to move beyond producing résumés that don’t fully quantify accomplishments and differentiate clients.

Step Ten: Book and Deliver Two Speeches

We want you to get your feet wet in the real world of private practice marketing. Maybe you already have a lot of experience booking speeches, in which case this step will be business-as-usual. But if you are not accustomed to reaching out to organizations to get on their speaking rosters, this step in the certification process is our way of pushing you to do so. It will be very difficult to grow your private practice and help build the Club if you are reluctant to promote yourself to professional and alumni associations. Most of our Guild members actually **love** to give speeches—but lining up speeches is the common downfall. There is an entire chapter in this manual on how to line up speeches (Part III, Chapter 3).

Because of the lag time between booking a speech and delivering it, because there can even be many weeks between the time you initially contact an organization and land the gig, you should begin outreach to your target market (i.e., the organizations that appeal to you) right away, i.e., as soon as you have begun the certification program.

What happens if you have completed all of the certification requirements, but the speeches you have booked are still

many weeks or even months away?

- Do we withhold your certification until the speeches are actually delivered? No. We trust that the speeches will be delivered—because, if you are like most of our coaches, you too love to give speeches. We just need to know that the speeches are on the calendar.
- Do we call the organizations to verify that you have set up the speeches? No. Nor do we send someone to listen to your speech, to verify that you have promoted the Five O’Clock Club appropriately during your presentation (we grant points for client referrals, based on your positioning yourself as a Five O’Clock Club coach—and promoting the Club in a meaningful way; see Part III, Chapter 4). Everything is based on trust. One of the mantras that we urge job hunters to use during salary negotiations is ‘you’re a fair person, I’m a fair person.’ That’s a good way to characterize the Club’s relationship with our coaches. We reward you with clients based, in part, on your efforts as a public speaker—and we expect fairness all around.
 - Please note that, when we say ‘promote the Five O’Clock Club in a meaningful way at speeches’ we do **not** expect you to give a commercial for the Club. That would alienate the audience and the organization that invited you. There is a chapter in this manual (Part III, Chapter 4, “What It Means to Give a Five O’Clock Club Speech to Earn Points”) that explains how to promote your private practice and the Club in a **low key and effective manner**.

- **Step Ten Learning Goal:** this is a lesson in self-marketing. You will learn by doing: targeting organizations, reaching out to them, and negotiating with program planners to book speeches.

Step Eleven: Give the 15-Minute Presentation

If you live in or near New York City, you may come to the Five O’Clock Club home office at 300 East 40th Street, Suite 6L (at the corner of 40th Street & 2nd Avenue, a residential building, The Churchill). If you are outside the New York area, we ask you to make a video of your presentation. One way to do this: burn the video onto a disk and mail the disk to the Guild Director. You may try to email the file, but usually such files are too large.

The purpose of the presentation is to demonstrate your mastery of a Five O’Clock Club topic and your understanding of brand promotion.

There are seven topics from which to choose:

- The 5OCC Approach to Assessment
- The 5OCC Approach to Targeting
- The 5OCC Approach to Interviewing
- Turning Job Interviews into Offers
- The 5OCC Four-Step Salary Negotiation Method
- How to Evaluate a Search: Stages 1, 2 and 3
- Résumés the 5OCC Way

Presentation Guidelines & How to Prepare

- Imagine that you are addressing a group that has never heard of the Five O’Clock Club. You want people to leave your speech with a clear understanding of a 5OCC topic.
- After you have selected your topic, schedule a brief telephone tutorial with the Guild Director. These one-on-one sessions typically last no more than fifteen minutes and are designed to provide extra guidance on how to prepare for your presentation.
- After you have selected your topic, be sure to listen to the appropriate recorded lecture, study the speech outline for that topic (found in Part III, Chapter 7), and read the chapters in the book(s). You might also find your topic covered by one of the 2-page excerpts from *The Five O’Clock News* (ten of these are found in Part III, Chapter 8). You should have no trouble putting together a 15-minute presentation after studying these resources.
- During your presentation, in quoting or referring to Five O’Clock Club books and methodology, **do not say**, “Kate Wendleton says....” or “Kate Wendleton recommends....” This would not help build the brand name. A few years ago, a coach-in-training was only a few minutes into her presentation, and had used the words “Kate says....” several times. Kate interrupted her: “We are not trying to build a Kate-cult. We are trying to build a brand name.” Hence our primary mantra, in all contexts, is “At the Five O’Clock Club, we.....”

And a word of caution here to seasoned career coaches: make sure you truly understand Five O’Clock

Club methodology. Your presentation will be weak if you simply tack on the words “At the Five O’Clock Club, we....” to material that is not 5OCC methodology. For example, a coach might say, “At the Five O’Clock Club we will teach you the Six Steps to getting a new job,” because the coach may have been preaching about six steps for years. But **we** don’t have or advocate a six-step process—that is found nowhere in our lexicon or literature, and such a statement would dilute the methodology and confuse clients.

- By all means, use notes during your presentation. This is not a memory exercise. Use any visual aids you want (flip-chart, overhead projector, PowerPoint, etc.) if you are making the presentation by *video*. But such aids are not available at the New York home office for those who make the presentation in person. The Club’s home office is very small: there are no private offices or conference rooms. Of course you may bring along hard copies of a PowerPoint presentation.
- Record the video in a setting that makes *you* comfortable. One woman in California made the recording on her backyard patio—with mountains and flowers as the backdrop. Another gathered friends and neighbors in his living room so that he would have an audience. But one coach was so intimidated that he put the camera on a tripod and sat almost motionless behind his desk as he spoke. We know that you may be nervous and assume that your presentation skills can be improved. In viewing the video, we will evaluate your mastery of the Five O’Clock Club topic.
- Here’s a suggestion for improving the presentation: use examples from real life as much as possible. And use them right away—not ten minutes into your talk! People pay attention more when theories come alive through actual case studies. For example, you could say, “A few months ago a man came to see me who had been on 15 interviews and never got call-backs....” *Now that piques interest:* right away people want to know how Five O’Clock Club techniques helped him correct his mistakes. Or, talking about targeting in the abstract for five minutes is not nearly as compelling as saying, “My client Jane had two major targets: she was looking for auditing positions in banking in Chicago or compliance positions at insurance companies in Milwaukee. She estimated that there were forty positions in target one

and thirty in target two.” This kind of real-person illustration makes it much easier to grasp the three elements of a target—and how targeting can help people reach the goal of aiming for 200 positions. One of our most exciting presentations was given by a coach who described how two of his clients—a junior and a senior person—used our Four-Step Salary Negotiation method to get huge pay increases.

If you are just getting started in career coaching, and thus don’t have many client stories to draw on, use stories you’ve found in our books (especially *Report from the Front Lines*), on the CDs, in the newsletters (there are lots of successful job hunter reports)—or make up stories! Of course, making up stories for speeches you give to the public is *not* a good idea...but for purposes of the certification exercise, fictitious clients can help you make your point. And we don’t mind at all if your presentation sounds like it comes right out of our books—if you’re ‘going by the book,’ you’re delivering the methodology!

- If you don’t live near New York, but want to go there for the presentation, that’s fine too. Coaches from Ohio, Illinois, Missouri and Kentucky, who happened to be in New York on other business, made a point of scheduling their presentations at the home office.

Scoring Categories for Your 15-Minute Presentation

1. Mastery of Five O’Clock Club methodology
2. Use of client examples
3. Use of brand name lexicon
4. Presentation skills

Although ‘presentation skills’ is on this list, it is included for purposes of making constructive criticisms and comments—not grading. Our concern is your mastery of the other three categories.

- **Step Ten Learning Goal:** to learn the techniques for being a brand name representative, and positioning yourself as a brand-name career coach.

After You Cross the Finish Line

Step One: Bio & Photo

You will be asked for two items to be used on the Five O’Clock Club website. These should be submitted

as soon as you have finished certification.

- **Your Five O’Clock Club positioned bio.** In Part III, Chapter 5, “The Art of Capturing Clients,” you will find all of our guidelines and suggestions for writing your Five O’Clock Club bio. Give your bio very serious thought. It is actually **your** Two-Minute Pitch and will be read by people visiting the Five O’Clock Club website. When we refer clients to you for coaching, we always give the name of one other coach as well. It’s not unusual for clients to look at the bios before calling the coaches. **Your bio should be the strongest possible representation of your background and skills.** Give as much information as you can about your industry specializations.

- **Your photo.** Especially if you are trying to build a private practice, you should have a formal headshot taken. The color or black & white photo can be emailed to us. Sometimes coaches send us candid photos, with *mixed* results. If you are tempted to use a candid shot, have several friends look at it to give you a critique. The photo is part of your marketing arsenal—do you *look like* someone people would want to come to for coaching?

But there can be dangers when using a professional headshot. We have been startled to see very slick headshots that look more appropriate for a dating website! Remember you are not looking for romance; you’re looking for clients. Just be sure to smile and look professional, but ‘alluring’ is not appropriate!

Step Two: The Talent Inventory Survey

The Talent Inventory Survey is for our use at the home office. It is questionnaire (which you fill out via an Internet link) designed to bring together, concisely in one place, a lot of information about your coaching strengths and preferences. All information is put into our database for use in referring clients appropriately to our Guild members. Without *your* information in this talent inventory database, you will be at a disadvantage when we assign clients to coaches.

Step Three: Your Private Practice Marketing Plan

Preparing the marketing plan while you are working through the certification program will help you maintain momentum. It’s a good idea to have it *completed* by the time you finish.

The marketing plan should be a very detailed description of your campaign to build your private practice, taking advantage of the Five O’Clock Club brand name. Full discussion of the marketing plan can be found in Part III, Chapter 1, but we offer a rough outline of the components here. It should include:

1. Your Target Markets

The professional or alumni associations organized by target, that you plan to contact for lining up speeches and establishing strategic partnerships. The marketing plan will include **lists of organizations** in each target.

2. Techniques for Developing Your Database

The software you’ve chosen, the lists, existing databases and rolodexes to be used to build the database; ideas for capturing names at speeches and workshops.

3. Plans for Promotional Materials

Brochures, headshot, letterheads, website development strategies, all of the handouts to use at speeches, e.g. reprints of articles you’ve written or newspaper clippings about you.

4. The Detailed Timetable, on a Calendar, for:

- researching associations
- contacting associations
- sending promotional materials
- making follow-up phone calls
- sending monthly or bi-weekly emails to organizations and clients

A detailed marketing plan requires a lot of time, focus, research, hard work and follow-through. The Guild Director is willing to review your marketing plan and offer feedback. We award a client-referral point for completing the plan and **reviewing it with us** because it is a major project. Treating it as the culmination of your certification process is designed to help you move forward.

Clients at the Five O’Clock Club are energized by doing their Forty-Year Vision, and your marketing plan should represent an important step in implementing *your* Forty-Year Vision. Brainstorming with us about this detailed blueprint for enhancing your private practice can have the same impact.

Step Four: Create an Excel Income Tracker

Certainly at the end of every year, even at the end of

each quarter, you will want to evaluate the financial impact of your affiliation with the Five O’Clock Club.

Provided you have earned points for your account, there will be direct referrals of retail clients to you—and they pay you directly. There will be referrals of outplacement clients to you, and you invoice the Club for the hours you spend coaching these clients. If you lead one of our weekly small groups, you are paid a nominal amount for doing so—and some of the group retail clients may ask you for private sessions, for which they pay you directly. These are all ways in which your Five O’Clock Club affiliation translates into cash flow, and we recommend that you establish an Excel spreadsheet for tracking these dollars that result from your connection with the Club. Obviously this will be a handy tool at tax time, but it also will provide a very useful overview of the financial rewards of working with the Club.

Clearly we hope that you will become a better coach after studying for certification, but we also hope that you will become a more prosperous one as well. Everyone will benefit if that prosperity is well documented. You want to be able to say on December 31st every year, “*This* is how much money I earned because I am a Five O’Clock Club coach.”

Your Certification Checklist

| Item | Date Completed |
|--|-----------------------|
| Teleclass One: An Overview of the Certification Program | |
| Teleclass Two: How to Line Up Speeches | |
| Teleclass Three: Q & A on Test One | |
| Teleclass Four: Q & A on Test Two | |
| Teleclass Five: How to Lead a Five O’Clock Club Small Group | |
| Teleclass Six: How to Have Maximum Impact When Delivering a Speech | |
| Test One: On the Club’s Job Search Methodology | |
| Test Two: On Marketing Your Private Practice | |
| Group Observation/Audit 1 | |
| Group Observation/Audit 2 | |
| Group Observation/Audit 3 | |
| Group Observation/Audit 4 | |
| Group Observation/Audit 5 | |
| Group Observation/Audit 6 | |
| Group Observation/Audit 7 | |
| Group Observation/Audit 8 | |
| Group Observation/Audit 9 | |
| Group Observation/Audit 10 | |
| Essay on Observations/Audits | |
| Résumé Revision Exercise | |
| Fifteen-Minute Presentation | |
| Speech One Booked | |
| Speech Two Booked | |

POST CERTIFICATION CHECKLIST

| Item | Date Completed |
|---|-----------------------|
| Bio submitted for Five O’Clock Club Website | |
| Photo submitted for Five O’Clock Club Website | |
| Talent Inventory Survey completed | |
| Marketing Plan Created | |
| Excel Income Tracker Created | |