Current State:

Sarah finds herself in a place where her values align with the strong desire to guide individuals towards financial success. She deeply resonates with people who feel they need help managing their finances, but she struggles to tap into this market effectively. While she has a wealth of knowledge and wants to provide guidance, she grapples with presenting her services in a way that truly addresses the unique needs and concerns of her potential clients.

Sarah values the concept of taking the plunge in investing in herself and her business. She wants to build solid foundations within her business, establish efficient systems, and hone her knowledge to become a more effective financial coach. However, she currently faces a sense of uncertainty about the direction of her business and struggles to harness the full potential of social media. Sarah strives for constant progress, a more efficient use of her efforts, and growing her confidence in dealing with clients and managing her business.

Dream State:

In her dream state, Sarah looks back in awe of what she has accomplished as a financial coach. She has successfully honed her knowledge and built a thriving business with a well-structured approach. Her services are valued by clients who appreciate the guidance she provides, and she feels a deep sense of confidence in the value her services offer.

Sarah has implemented a clear plan that is tailored to each client, making them feel supported and understood. She has overcome her struggles with social media, making it a powerful tool for her business. Her hard work has become more effective and efficient, leading her to her goals faster, and she has a clear direction in her business.

Sarah's dream is to have solid foundations in place, making her business more efficient and less reliant on guesswork. She values constructive feedback and has embraced an uplifting approach to growing her business. She has detailed strategies in place to continually improve her business and feels fully equipped to tackle all aspects of her role as a financial coach.

Challenges and Roadblocks:

Despite her strong aspirations, Sarah faces several challenges and roadblocks on her journey:

Lack of Clarity: Sarah struggles with a clear direction for her business, making it challenging to set specific goals and strategies.

Social Media Engagement: Harnessing the untapped potential of social media proves to be a challenge, preventing her from reaching a wider audience.

Efficiency and Time Management: Sarah feels that her current systems are not as efficient as they could be, leading to a sense of wasting time and effort.

Self-Confidence: She battles with confidence issues in dealing with clients and managing her business effectively.

Financial Acumen: While she has substantial financial knowledge, she wants to build a more comprehensive understanding of the unique challenges of being a financial coach.

System Implementation: Sarah struggles with different back-office systems and operations, making it challenging to streamline her business effectively.

In summary, Sarah is on a mission to educate and guide individuals to financial success. While she faces several challenges and roadblocks, her unwavering determination, desire for constructive feedback, and emphasis on efficiency and preparation will drive her toward her dream state where she fully realizes her potential as a financial coach.

Outreach Copy (email):

SL: For (name)!

Had a look at your free wealth-building toolkit… Just be careful your audience doesn't handle finances better than you!

Now, I've spoken to finance coaches and understand the time it requires… Which is why you're shooting your hard work in the foot by not opening the floodgates for new audiences.

Your super low social media traffic suggests a lack of resonance with the emotions driving financial action. I'm not here with another "fancy" ad formula or an 18-step email process.

But to illustrate my point, I've attached a finance campaign below to resonate with people struggling with their money, based on the analyzed emotions your audience is currently responding to and inspired by the exact frustrations top-performing finance coach Rich Dad is currently utilizing.

You can even test it for free. Interested?

Jamie.