System & Soul *Coaches*

We help high-capacity leaders become exceptional business coaches.
With the System & Soul™ Coaching Framework, you can build a practice that
creates substantial income and delivers sustained impact.

SYSTEM & SOUL™

System & Soul™ *Manifesto*

WE BELIEVE IN BUSINESS

Small businesses represent the heartbeat of our communities. As business owners, we see opportunities, needs, and desires—then we find ways to not only meet them, but also create value through them.

WE BELIEVE IN A SYSTEM

Businesses that invest in a defined system of operation can grow faster and accelerate value creation.

With great organization, businesses can better invest in their people, avoid solving the same problems over and over, delegate responsibilities, and stay hyper-focused on what matters most.

WE BELIEVE IN A SOUL

Every business is born with a soul. Some are oppressed, some are neglected, and some of the best bring freedom.

What most business owners don't know is that the soul of the company can be crafted, engineered, and equipped for success.

Nothing fuels competitive advantage like a soul that is alive and in sync with its design.

SYSTEM & SOUL™

SYSTEM & SOUL *Model*

Get clear on how we move. *Design*
- Structure
- Process
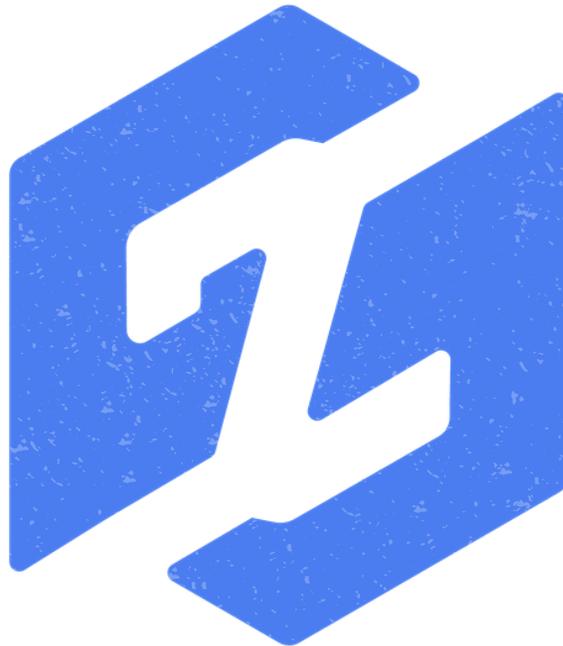- Bets

Move at the same pace. *Cadence*
- Objectives
- Healthy F.I.T.
- Weekly Sync

Measure our progress. *Score*
- Company
- Team
- Individual

Destination **Go the same direction.**
- Where
- Why
- When

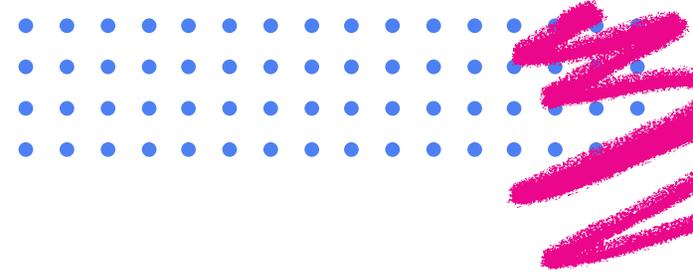*Ethos* **Know who we are.**
- Identity
- Values
- Hedgehog

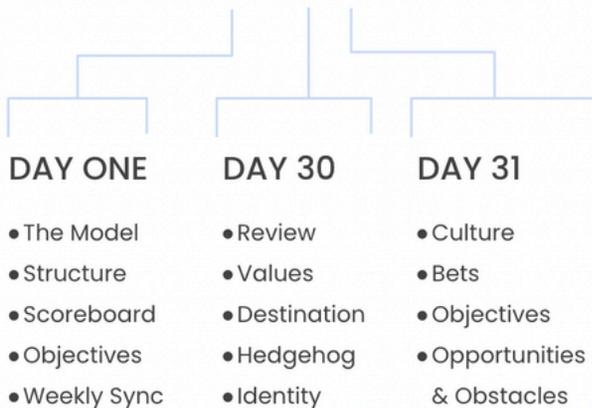*People* **Right humans, growing & healthy.**
- Culture
- Problem Solving
- Leadership

SYSTEM & SOUL™

SYSTEM & SOUL *Journey*

CLARITY

DAY ONE
- The Model
- Structure
- Scoreboard
- Objectives
- Weekly Sync

DAY 30
- Review
- Values
- Destination
- Hedgehog
- Identity

DAY 31
- Culture
- Bets
- Objectives
- Opportunities
  & Obstacles

Learn the 4 tools for confident execution

One-Page Strategic Road Map

CONTROL

QUARTERLY REFUEL
- Review Last Quarter
- Review S2 Road Map
- New Tools/Team Health
- Next Quarter Objectives
- Opportunities & Obstacles

BREAKTHROUGH

ANNUAL STRATEGY

DAY ONE
- Look Back
- Look Around
- Team Health
- New Tool

DAY TWO
- S2 Diagnostic
- Bets
- Objectives
- Opportunities

YEAR TWO
- 3 Refuels
- 2-Day Annual
- Mastery

SYSTEM & SOUL™

SYSTEM & SOUL *Coach Training*

- Location: Atlanta, GA
  *Check with the team for upcoming training dates.
- Meals and materials provided on-site

What you can expect to gain during training:

1. Learn the System & Soul™ Model, Process, and Philosophy
2. Complete overview of the core System & Soul tools and session day content
3. Roleplay and discussion about common facilitation scenarios
4. Business development training and 90-day plan to go launch your business
5. Networking with a high-caliber group of experienced coaches and business leaders

DAY 1
- System & Soul Philosophy
- Learning to facilitate Clarity Day 1 Tools

DAY 2
- Learning to facilitate Clarity Day 30 and 31 Tools
- Dinner with the cohort

DAY 3
- Setting up Your Business
- Getting Business / Business Development
- Workshops and Talks

SYSTEM & SOUL™

WHO MAKES A GREAT *Coach?*

Our process is all about ensuring a great mutual fit—that S2 is right for you, and that you're right for S2.

There are two essentials we look for in coaches we invite into our community:

1. **Hustle, Riz, and Reps:**
   - "Hustle" = Your Drive: You're actively taking action to grow your coaching business and engage your network.
   - "Riz" = Your Presence: You bring confidence, charisma, and a natural ability to engage others.
   - "Reps" = Your Experience: You have a proven track record—whether in coaching, business ownership, or leadership—that shows you can deliver real results.

2. **Shared Values:**
   - Stay Grounded: You're committed to personal growth, holistic health, and being inwardly sound.
   - Do the Work: You take action, execute smart ideas, and put in the effort to achieve meaningful wins.
   - Champion Dignity: You value and respect the inherent worth of others.
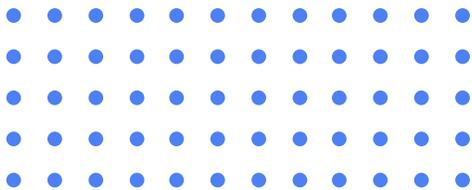
WHAT OUR COACHES ARE *saying*

"The decision to go all-in with S2 was because the framework integrates the culture with the system. There are LOTS of other systems frameworks, but no one I saw with the **culture part integrated with the vision** for how to continue to grow over time."

    - System & Soul Coach Robin Phelps-Raymond

"I chose to become an S2 coach because it connected with how I led in my own company and other organizations I have been a part of. It has allowed me to **bring a kind of good into the world** through organizations and for my family that otherwise didn't seem possible."

    - System & Soul Coach Kenny Lange

What drew me to System & Soul was the perfect balance of structure and soul—and the **freedom to flex the framework** to meet each client where they are. Whether I'm working with a small team, an executive leadership group, or front-line staff, I can **adapt the tools to create clarity, alignment, and momentum.**

What's equally life-giving is the community of fellow coaches. It's rare to find a group so full of heart—people who lead with purpose, genuinely want to make an impact, and show up with **openness, humility, and kindness.** It's not just a coaching system, but a tribe that inspires me.

    - System & Soul Coach Dana Collins

Coach INVESTMENT & INCOME POTENTIAL

These numbers represent some common costs as well as the averages we see across our coach community for client fees and annual income.

INVESTMENT
- $15,000 one-time training fee
- $495/monthly membership
  - License and use the tools and content
  - Receive community access and support
  - Receive commissions for referrals and software users
- ~$1,500 Annual Coach Gathering (event registration)

EXPENSES
- $50-100/month E&O Insurance
- $200-300 one-time client onboarding materials
- Event sponsorships (variable)
- Virtual assistant (variable)
- Travel for client engagements (variable)
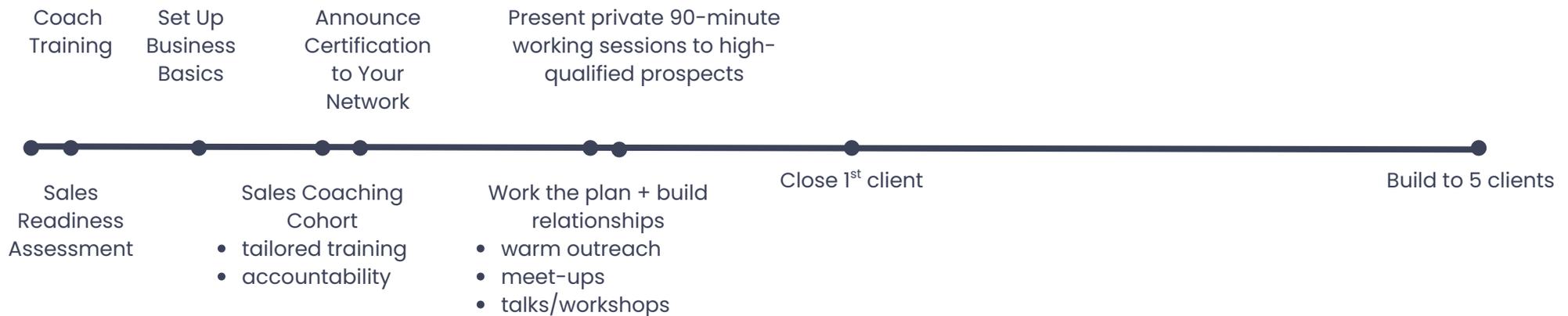
INCOME POTENTIAL
- 4-5 session days per year, per client on average
- $6,000-8,000 per session or $3,500/month average client fee
- $24,000-$42,000 per year, per client

Coach Journey

THE FIRST 6-12 MONTHS

Every coach journey looks a little different. Season and stage of life, intended outcomes for their practice, business development experience and readiness of their network are all important factors that affect the first year of building a practice. Based on several years of supporting coaches through this journey, we've developed a plan to help accelerate success and anticipate milestones.

Coach Training

Set Up Business Basics

Announce Certification to Your Network

Present private 90-minute working sessions to high-qualified prospects

Close 1st client

Build to 5 clients

Sales Readiness Assessment

Sales Coaching Cohort
- tailored training
- accountability

Work the plan + build relationships
- warm outreach
- meet-ups
- talks/workshops

We've Got Your Back

Resources and tools available from System & Soul to support your coaching journey.

1 WEEKLY COMMUNITY

Discuss key topics with other S2 Coaches each week.

Find community. Chat with other coaches every week about real-life problems and solutions that can be applied to your coaching practice.

- Meet other S2 Coaches
- Ask questions - gain insight
- Problem solve together

2 QUARTERLY GATHERINGS

Join the team for quarterly refuels and other important events.

Every quarter, S2 hosts a quarterly refuel that all active coaches can attend. Each refuel has a different, valuable topic that you can apply to your coaching practice.

- Once a quarter
- Applicable workshops
- New tools & resources

3 ON-DEMAND TOOL LIBRARY

Discover the resources and tools System & Soul has to offer.

Active coaches have direct access to all of the resources and tools System & Soul has to offer. These tools can be found in the coach portal as well as the shared drive. Here are a few things you have direct access to:

- Coach Toolkit (40+ tools)
- Marketing and Biz Dev Resources
- Workshops and Presentations
- Client Management Resources

4 ONGOING ACCESS TO OUR TEAM

Meet with S2 Team Members for support

Still have a question? Prefer to have a one-on-one conversation? Our team is eager to get you where you need to be.

- Benj Miller, Facilitation and BD Support
- Hannah Vincent, Admin & App Support
- Coach Community, Real-time

SYSTEM & SOUL *Tools + Content*

CLARITY DAY 1

- **Org Chart** - Design the structure of an organization.
- **C.A.R.** - Clarity, autonomy, & results are essential elements of any leadership role
- **Healthy F.I.T.** - "F.I.T." is a tool for aligning the functionality of a role. "Healthy" is aligning that person with the soul of the business.
- **Scoreboard** - Create clarity about the metrics you measure and define a cadence for measuring results.
- **Objectives** - Defining and executing the most important priorities for the next 90 days.
- **Weekly Sync** (D.A.T.) - Connect as a team, stay on track with the Objectives, and address

CLARITY DAY 30

- **Values** - Who we say we are.
- **Destination** - Discover the vibrantly clear destination to gain momentum and focus within your team.
- **Hedgehog Concept** - Find piercing clarity about where authentic power lies in the business.
- **Identity / Onliness** - Define your organization's unique identity in a simple, one-sentence statement.

CLARITY DAY 31

- **Org Habits + Culture** - Aligning our values with real, habitual actions and engineering the culture we aspire to.
- **Bets** - Discover the long-term "risks" you are willing to take to grow the business to reach your Destination.
- **Objectives** - Defining and executing the most important priorities for the next 90 days.

SYSTEM & SOUL™

SYSTEM & SOUL *Tools + Content*

QUARTERLY & ANNUAL TOOLS

- **5-Dimensional Thinking** - Think about the business in new ways.
- **I Am / I Am Not** - Explore self-perception while fostering personal growth and team understanding through reflective exercises and group discussions.
- **A Time When I Felt Most...** - Listen and learn about the people around you.
- **Check-in Upgrades** - Reconnect on a human level in those weekly/quarterly/annual meetings in order to surface some issues that may belong on your agenda.
- **Five Friends** - Widen your lens and surface new thoughts about the business.
- **Mixtape** - Connect and express honest feelings about organizational performance through song selection, fostering candid emotions, and surfacing insights for growth.
- **If You Really Knew Me** - Discover new facts about the people around you.
- **Life Walk Exercise** - Remember the key moments that helped shape who you are.
- **My Deeper Truth** - Relate with the people around you using stories and memories.
- **NEXT/TEN** - build a bridge from where we are now to where we want to be 10 versions from now.
- **The Music Game** - Guess who the song belongs to.
- **Where are we?** - Discover and define the stage of business you are in.
- **2 Attributes of Exceptional Leaders** - Gain a new perspective on what leadership can look like within the organization and begin working on developing those key attributes.
- **4 Gates of Trust** - Determine your levels of trust.
- **5 Dysfunctions of a Team** - Start a conversation around the deep-rooted people issues that are getting in the way of great results.

SYSTEM & SOUL™

SYSTEM & SOUL *Tools + Content*

QUARTERLY & ANNUAL TOOLS

- **Engagement Index** - Help leaders and team members understand the key elements that drive engagement in the workplace.
- **Healthy F.I.T. Conversations** - Review each team member on their values.
- **Leadership Pulse** - Gain clarity on the factors that have the most significant influence on your overall leadership effectiveness.
- **Purpose/Purpose Capacity** - Create more margin and to help teams avoid burnout.
- **Radical Cando**r - Build the safety and vulnerability of the team.
- **Saboteurs** - Overcome self-sabotaging behaviors.
- **The Power of TED (The Drama Triangle)** - Live more effectively and with much greater fulfillment.
- **Predictable Success / VOPS Leadership Styles -** Understanding leadership styles and how they coincide with an organization's stage
- **Working Genius** - Discover your genius and transform your work.
- **7 Deadly Sins of Objectives** - Discuss your objectives and share which one you are most susceptible to.
- **Bets Box** - create clarity around whether a "bet" is worth pursuing.
- **Commander's Intent** - Create extreme clarity where ambiguity often finds roots.
- **Leverage** - Discover how you can maximize your time and drive value for your business.
- **Process** - Document the process in a simplified way.
- **Types of Opportunities** - Learn how to identify the type of opportunity to create breakthroughs.
- **Psychological Safety** - Build an environment where it's safe to risk vulnerability.
- **The Bottleneck Behaviors** - Overcome your bottleneck behavior and learn to delegate effectively.

SYSTEM & SOUL *Tools + Content*

ASSESSMENTS

FREE ASSESSMENTS
- **Leadership Pulse (Individual)** - Take the pulse of your own leadership effectiveness.
- **Leverage** - Discover how you can maximize your time and drive value for your business.
- **S2 Diagnostic** - Complete the S2 Diagnostic to get a pulse on the health of a company in both the system and soul of their business.
- **Winning Metrics AI** - Define what success and specific metrics look like in your role or for your team with this AI-driven tool.

PAID ASSESSMENTS
- **Engagement Index** - Gain clarity on the key factors that influence engagement in the workplace by assessing and discussing them as a team—building awareness that leads to greater motivation, satisfaction, and performance.
- **Leadership Pulse (Three Sixty)** - Take the pulse of your own leadership effectiveness and include the perspective of others.

WORKSHOPS

- **2 Attributes of Exceptional Leaders** - Leadership defined by who you are, not what you do.
- **Culture Equation** - Define values, organizational habits, and cultural outcomes.
- **Strategy Sprint** - Eliminate reactivity in the business, create hyper-focus, and execute with confidence.
- **Strategic Planning Workshop** - Align your vision, strategy, & execution.
- **Lead On Level** - A 5-part series to develop operational and leadership excellence at every level of an organization.

SYSTEM & SOUL

FREQUENTLY ASKED *Questions*

TRAINING AND MEMBERSHIP
How long is training?
Training is 2.5 days

Where is training held?
Training is always in-person and is currently held in Atlanta, GA

How often do you hold training sessions?
We hold in-person training sessions every quarter.

How much does it cost to be certified and remain a member of this program?
The total cost for certification is $15,000.
Membership is $495/month

What are the ongoing obligations of a coach?
We do not require a minimum number of clients or sessions in order to stay active as a coach.

We encourage coaches to stay connected through our weekly calls and quarterly refuels. The coaches who get the most out of our program are active in our community and doing ongoing work to build their business.

What's included in the training and membership?
Training includes 2.5 days of instruction on the 5 Essential Tools in the System & Soul Framework: 4 Tools for Confident Execution and the Strategic Planning Road Map. Travel expenses are not included in the fee and will be the responsibility of the trainee. Membership includes access and permission to use all the intellectual property System & Soul has developed. It includes ongoing access to our community of coaches, weekly coach calls, and quarterly gatherings. It also includes a free S2 Sync account (our app).

SYSTEM & SOUL

FREQUENTLY ASKED *Questions*

Will System & Soul send me client leads?
All business development efforts are the responsibility of the coach. However, we (System & Soul) are continuously building marketing content to create brand awareness with our audience.

How does the organization help with business development?
System & Soul provides ample marketing and sales collateral to help with events, social media and online presence.

When we are able, we will co-invest with coaches on event sponsorships where the coach is actively sharing and promoting System & Soul by leading a breakout talk, keynote, or hosting a booth.
Our coach community also spends regular time sharing and discussing business development techniques and opportunities that work for them and are open handed in working together.

What kinds of tools and resources are available to System & Soul Coaches?
On-demand access to an online Coach Portal that includes:
- Written guides for all the coaching tools and exercises in our library
- Outlines and guides for all session days
- Sales and marketing resources (templates and examples)
- Client management resources (guides and communication templates)
- Video course version of our essential tools
- Talks/keynotes/workshop outlines and resources
- Access to the S2 Sync app (our software)
- Access and use of all our free and paid interactive assessments

SYSTEM & SOUL™

FREQUENTLY ASKED *Questions*

OUR MODEL

Is System & Soul a franchise?

System & Soul is not a franchise. Our coaches operate completely independent of us. Our relationship is defined in a brief agreement that outlines how our coaches can use our framework and content while they have an active membership.

How is System & Soul different from EOS, Scaling Up, or other business operating systems?

System & Soul offers both simplicity and depth where most other operating frameworks become either shallow or overly complex.

Our framework provides a baseline, proven set of tools that are ubiquitous in business operating systems while also engaging and strengthening those systems by building organizational health. Our competitors are often serving only one of those two outcomes and therefore don't provide a company with a holistic approach to growth and sustainability.

OUR COMMUNITY

How many coaches do you have?

Our community grows every quarter. As of Q4 2025 we have 47 active coaches.

Are your coaches limited to territories or are many coaches competing in one geographical market?

Coaches can choose the region or area they want to coach in. They are not limited by any geographical barriers. Our coaches are very collaborative when they are in the same region. They often meet up to share best practices and have been known to collaborate on speaking and networking events.

SYSTEM & SOUL