

Your *AI-Resilient* Bonus Toolkit

More clients. More money. More freedom.

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Table of contents

Standard Operating Procedure (SOP) Template 3

Finding Your Sweet Spot with Ikigai 4

5-Star Case Study Builder 5

5-Star Testimonials: Greenshot Tutorial..... 6

Cheat Sheet: Smart Places to Showcase Your Qualifications and Professional Development 7

Booking Links and Free Calls - Helpful Tips..... 8

Standard Operating Procedure (SOP) Template

When this happens:	My response is:
ABC (e.g., client requests a quote)	
ABC (e.g., client asks why not just use AI)	
ABC (e.g., I hold a discovery call)	

Finding Your Sweet Spot with Ikigai

1. Set a 5-minute timer for each box and GO!

What I love to do:	What I'm good at:

2. Look for overlap between “What I love to do” and “What I’m good at.” If something appears in both, keep it; if it’s only in one, cross it out.

3. Take the remaining items and see which one(s) fit into BOTH categories below!

What the world needs:	What I can get paid for:

**If nothing fits into all four boxes, try being more aspirational—what would you love to learn that could fit into all four?*

5-Star Case Study Builder

Step 1. Gather what you'll need:

- A. Identify a complex problem you solved to your (ideal) client's satisfaction
- B. Jot down the quantitative and qualitative outcomes of the work you did
- C. Ask your client for a testimonial about the results they achieved with your help, and for permission to create a study about it for your marketing (this is also great relationship building!)
- D. Secure screenshots, charts, graphs, media photos, etc., so you have some visuals + supporting evidence for your case study

Step 2. Now write out 3 lines each...

- E. A description of the client's problem, i.e., pain points, what wasn't working, what metrics were too high or low (this is your "before" in the "before and after" of the case study)
- F. What your client hoped to achieve, and key performance indicators
- G. Describe the steps of your work, including tools, techniques and strategies; make sure to mention any personalization
- H. Write out the client's end results, in both quantitative and qualitative terms, taking care to highlight specific transformations
- I. Mention special challenges and any surprising insights or outcomes
- J. Insert the testimonial (keep it to 3-5 lines max., and focus on the big outcome)
- K. Give a call to action and make it a low step, for example, download my free guide; drop a comment; share; book a no-obligation call

*Bonus tip: The biggest mistake is to make case studies long, text-heavy, dull and disorganized. Work from problem → solution → outcome → testimonial → CTA. You can find beautiful, free roadmap visuals at [Canva.com](https://www.canva.com)!

5-Star Testimonials: Greenshot Tutorial

Step 1. [Download Greenshot for Windows \(free\)](#)

- A. Install Greenshot
- B. Press the Print Screen button to take a screenshot of a testimonial you see on your screen (it can be anywhere—in your browser, in an app, on socials, etc.)

Step 2. Personalize the look

- C. Add a frame around the testimonial using the Draw Rectangle button the left, and select your company colors—now the testimonial will be branded!
- D. You can use the highlight tool (in the left-hand menu) to emphasize specific aspects of your testimonials, especially measurable results that your client achieved
- E. You can use the blur tool (a little lower, in the tools to the left) to exclude anything confidential
- F. Click the Copy image to clipboard button (in the upper lefthand part of the tool) or save it to your computer to be able to share it anywhere
- G. Now you have a real-life yet professionally branded testimonial that you can use on your website, in a premium portfolio, or in a LinkedIn featured box!

Cheat Sheet: Smart Places to Showcase Your Qualifications and Professional Development

Professional Title

LinkedIn (name or headline)
Social media bios and taglines
Email signature
Business cards
Canva graphics for free resources
Service proposals
Guest blog/podcast/speaker bios

Certifications and Accreditations

LinkedIn Licenses & Certifications section
LinkedIn Featured section (with visual badges)
About page footer of your website
Online scheduler (e.g., Calendly bio blurb with certs)
Email P.S. line (e.g., Proudly XYZ Certified)
Digital business card apps like HiHello
Canva graphics for free resources or lead magnets (cert badge visible)

Professional Development Courses

LinkedIn posts (specific takeaways + tagging people)
Email newsletters (“Here’s what I’m learning these days...”)
IG/FB reels (share a quick tip)
Ebooks and workbooks (drawn from your learning)
Guest blog/podcast/speaker bios (mentioning recent learning)
Facebook group intro posts (show you’re engaged in relevant training)
Portfolio of your work (LinkedIn Featured box)

Booking Links and Free Calls - Helpful Tips

Step 1. I recommend grabbing a lifetime deal on TidyCal, which works amazingly well and will save you a lot of money compared to other expensive booking apps with recurring subscriptions :)

- A. Install TidyCal
- B. Connect it with Google Calendar and create different Booking Types for different sorts of events (discovery call, follow-up call, etc.)

Step 2. Personalize the look

- c. Upload a clean headshot in the settings
- D. In the same settings, scroll down a bit and set the color to match your company color
- E. Now you have a branded, professional-looking booking link. This sets you apart as a consummate professional and eliminates back-and-forth emails to figure out available times!
- F. Better still, anyone who wants to book you can click “view mutual availability” to instantly overlay their calendar on yours and select a time when you’re both available

Step 3. Pro tip

- G. In the booking type, you can add mandatory questions. Here are some good ones for discovery calls!

Tell me a bit more about yourself and what you do.

What challenges are you currently facing that you’d like some help with?

Have you tried any other solutions?

Are you prepared to invest in yourself to achieve XYZ?

Where did you hear about my services? (Make sure to thank the person who referred them!)

Is there anything else you would like me to know before our call?

I would love to hear your thoughts on this toolkit!

What did you find most helpful? Was there anything you think I could add or improve? Your feedback means the world to me, and it helps me create even better resources for you.

Shoot me an email at info@joachimlepine.com. I read every response!

Ready to take your business to the next level?

If you'd like personalized help implementing these strategies, I'd love to chat with you. I offer 1:1 coaching for introverts who want to build an aligned, high-earning business—without burning out.

If that sounds like you, [click here to book a free 15-minute discovery call](#). Tell me about your vision for your business, and we'll explore if we're a good fit to work together.