COACHING
CONFIDENTIAL

Week Three:

Converting the Client
part 2

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NOTE:

You've reached the point in your business where it's starting to gain some **traction and momentum**. It's beyond exciting!

People may be commenting on your stories, messaging you, and asking for insight in your area of expertise.

They trust you. They see you as an expert.

Your audience is prime… and **you're ready to make some money!**

Module Overview:

In this workbook, we'll cover:

- Making the call
- Setting boundaries
- How to conduct calls
- Follow up for Yes, No & Maybe calls

Spotlight:

Making the Sale

The discovery call.

Show up & share your heart.

If you offer a one-on-one service such as coaching, some people know right away if they want to work with you and some need a little more time to think it over.

This is the beauty of the **consult/discovery call.**

By now, your website should indicate that you offer these calls and your calendar should be set up as well. Ideally, a potential client will go to your website and set it up accordingly, however **sometimes they need a little nudge.**

For example, if you are noticing a conversation is going back and forth via messenger or email, it's time to take it to the new level. An **example script below:**

"I'm hearing what you are indicating about _____ and it would be great for us to **expand upon this further over a call.**

You can find a 20-minute window on my calendar via this link. Please do let me know if you have any issues finding a time slot and we'll figure mutually convenient spot for us both. I'm so **looking forward to connecting more!"**

The discovery call.

Give more in less time.

Some coaches offer an actual coaching session/treatment as their consult and provide up to a full hour of their time. The logic behind this is to give the client an experience of what working together will be like and have them hungry for more.

This isn't my personal approach.

I truly believe **from just 20 minutes of conversation, you can convert your ideal clients into long-term paying customers.**

It's about making the individual feel heard and understood, supporting their struggles and giving them an opportunity to change.

What I see happening often is the **people looking for a deal will take advantage of this free service** or people that were on the fence feeling like they received enough value from the session and so they don't need extra services.

It's also about explaining your process and services in a clear and encouraging way.

When you have an interested person, I know it's the most exciting feeling, however STAY CALM. If you get desperate or over-excited, they'll feel it and it may throw them off. When a potential client comes through, **go to the other side of the room and have your "Buddy the Elf, OMG it's SANTA"** moment and then confidently and cooly retreat back to your computer and correspond with next steps.

Setting up the call.

Who calls who?

Regarding logistics, I recommend **having them call you vs. you tracking them down.** If they are ready, they'll call the number you provide.

In the chance of a no-show, I typically wait about 5 minutes and then send a quick email:

Hi _____!

Checking in for our call! I have us scheduled at _____. You can call me at _____.

Talk soon!

D

If you don't hear from them at all and they miss the session, wait an hour or so and see if they realized their error. It's possible it may have slipped and **we are all entitled to our mistakes!**

If they reach out, just let them know it's okay and have them reschedule. It may mean they have to wait until your available again, however I encourage you to **stay firm on your schedule to instill your boundaries.**

Rescheduling

Give them the control - keep your boundaries.

If they don't respond to your 1st email and completely missed the call, send them a follow up later that day.

Hi _____,

I'm sorry we weren't able to connect today! I hope all is well and I would love to reschedule. You can **find a new time on my calendar** here (insert link). Let me know if you have any questions. Look forward to connecting!

D

If you still don't hear from them after your follow up, let it go. There is a clear reason it's not aligned and not meant to be meddled further. **Do not take it personally!**

It's a great sign there was interest and the next aligned and serious client will be booking their consult soon!

REMEMBER:

There is **always more** coming.

Exercise:

The Sales Call/Consult Formula

The formula.

Sales & Consult Calls

1. Start off the call by thanking the person for taking the time to speak with you. And ask them **how they connected with you** (if you don't already know), as it gives your intuition some foundation.

2. **Indicate the flow** of the call.

   i.e. The purpose of this call is to get to know each other better, learn more about what's going on for you, and how I can be of service. If we feel like there is potential for more, we'll also discuss next steps!

3. Then **let them open up**.

   In a few sentences, what is currently going on for you?

   As they speak, showcase you resonate with what they are going through and validate. **It's basically a mini coaching experience.**

NOTE:

If during the time they share, you're feeling like "**OMG this is totally my client!**" contain that excitement and move in with the solution, not so much with a straight up answer, but with what you would offer that would naturally connect to what they are sharing with you.

For example, "I'm hearing how you xyz and I can absolutely understand why you feel that way. This totally syncs with the work I do, **can I share a bit of how I can help?"**

Sales & Consult Calls

4. **Lead in with the experience** of working with you and craft it around their problem. Don't get into logistics yet. **Share from the heart** and what it would be like to work with you by their side.

> What kind of shifts or experiences would occur?
> Ask them how that would feel.
> Then ask if they have any other questions.

If they don't ask about the cost or package details (they often don't), that's then where you offer the following:

> "Based on everything we discussed, I **would love the opportunity to continue to help you** move forward with _____.
>
> Can I share the next steps?"

5. Break down the program(s) that seems like the appropriate fit. Be very clear. Share the cost and mention payment plans. Then take a beat and pause.

> Don't justify or try to change it up or keep rambling! It's important to hold the space for them to **direct a clear answer.**

Close it out.

6. If they are on board, perfect! Advise you'll **email shortly with next steps.**

If they have to think it over, let them know you'll be sending an email breaking down everything discussed.

If they are having money reservations, again let them think about it and also mention a low cost option such as a solo deep dive session as a starter to get a feel for each other before you move forward.

7. End the call by thanking them for taking the time and how wonderful it was to get to know them better. Confirm next steps again and **end on a positive note!**

Once the client says YES on the consult call, the moments that follow are crucial for a successful continuation.

Email them with a recap of what you discussed on the phone together and map out the next steps of your journey.

You want to keep it **simple, easy to navigate, and of course, high vibe!**

While it's important to recognize it's there choice in where it's going to go from here and you have to hold space and trust.

If it feels really good and right, then it is and they'll invest. Remember this doesn't have to be complicated! **Let converting clients be a seamless, fun, and easy process!**

Email Swipe File:

Follow up your calls with these

The YES Email

Hi {First Name},

It was so wonderful connecting with you today! I appreciated you opening up about _____ and how ready you are to transform.

Further, I'm super excited to start our new coaching venture!

Per our conversation, we will move forward with the _____ package. This includes _____. It will be held over a _____ time period.

The amount is _____, split into ___ payments of _____. You can pay the invoice here. (insert link)

Upon confirmation of payment, you'll receive an welcome email from me including my calendar scheduling link, an insight form, and coaching contract to complete before our first session.

Let me know if you have any questions.

Can't wait to dive in! Woot woot!!

Best,
{you}

The MAYBE Email

Hi {first name}!

It was so wonderful connecting with you today! I appreciated you opening up about _____ and how ready you are to transform. Further, I'm excited about the possibility of us working together!

Per our conversation, here is the breakdown of the package offered including payment plans.

{List out in a clear, bulleted way}

At your convenience, please let me know how you'd like to move forward.

Let me know if you have any questions. I'm here for you!

Have an amazing day and looking forward to connecting more soon!

Best,
{you}

The NO Email

Hi {first name}!

It was so wonderful connecting with you today! I appreciated you opening up about _____ and how ready you are for change.

Should you find that you could utilize my services in the future, I'm outlining my packages for you below. Please do let me know if there is anything else I can do in the meantime.

{Brief recap of services}

Let me know if you have any questions.

Thank you again for taking the time to speak. Have a beautiful rest of your day!

Best,
{you}

NOTE:

Follow up.

For the individuals that haven't responded that were a 'yes' or 'maybe', I typically **wait 4-5 business days** to send a check-in.

They may be working out their finances, talking it over with their partner, or just had a busy week. I don't try to look into it too much.

Look to your follow up as a lovely reminder for something they want! The main thing is to not write them off or over-analyze. **We don't know what is happening behind the scenes.** Stay cool, calm, and collected when reaching out.

Following Up

Keep it fun & light

Hi {first name}!

Trusting you're having an amazing week! Again, it was so great connecting with you on our call the other day.

I wanted to check in about moving forward with our coaching journey. I believe it would be a huge benefit to get started sooner rather than later. If any questions have arisen, do let me know!

Enjoy the day!

Best,
{you}

If the MAYBE doesn't respond to my follow-up, I don't add any additional correspondence.

If the YES has totally ghosted (this is very rare), I may send one last check in, just very brief as a reminder. Please don't stalk them or reach out on other platforms. If email was the advised form of communication, stay there!

I don't send follow up to my NO individuals. **I do make sure they have been added to my mailing list** (same for the YES and MAYBE) so that down the line they can opt-in.

AFFIRM:

Converting individuals into paying clients is **FUN and a natural flow** of my business!

YOU MADE THE SALE!

Next steps in part 3!