CLIENT/CUSTOMER/PATIENT FLOW

Attraction

Attraction/Lead Generation Process

- Referrals
- Speaking
- Articles
- Networking
- Internet

Discovery Process

Initial Fact-Finding & Pre-Qualification Process

- Live conversation:
  Ask preliminary "get acquainted" questions (10-15 min)
- Qualifying information-gathering
  Word document
  Online questionnaire
  Online assessment
- Assess suitability for Strategic Session
- Invite to participate in paid Strategic Session

Diagnostic/ Assessment/ Strategic Session

- Identify ultimate aspirations and "measures of success"
- Map onto Core Client Process
- Summarize findings into Strategic Action Plan

Conversion

Enrollment Process

- Match aspirations with value of coaching
- Point out what they need, rather than what they think they need or "want"
- Address resistance and objections
- Filter through "client selection criteria"

Registration Process

- Schedule first and subsequent sessions
- Coaching Agreement
- Registration Form

Consumption

CORE CLIENT PROCESS

- A step-wise methodology
- Your unique, "signature approach" to delivering your services and products

SERVICE DELIVERY PROCESS

- Coaching
- Consulting (Implementation)
- Training
- Progress tracking and documentation

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