Paid Introductory Sessions:
Step-by-Step Sequence
STEP 1: Initial contact with potential client
Potential client contacts you
Or, you contact potential client
STEP 2: Arrange the initial “Get Acquainted” conversation
You arrange an initial "get acquainted" conversation
ALTERNATIVE: You start an email dialogue
STEP 3: Complete your initial “Get Acquainted” conversation
Carry out your 1st brief "touch base" conversation
If appropriate to moving forward, invite the potential client fill out a "snapshot" questionnaire (or webform)
If not appropriate for moving forward, communicate this with potential client
STEP 4: Provide "snapshot" questionnaire or online form
Send the potential client your "snapshot" questionnaire as a modifiable document or provide a link to an online form
STEP 5: Potential client completes and returns "snapshot" questionnaire
STEP 6: You review their questionnaire
Formulate additional areas for questioning and clarification
Compare client responses to your "ideal client criteria"
STEP 7: Clarify specific areas of interest or concern that you've identified in the “snapshot” questionnaire by contacting your potential client
E-mail the potential client
ALTERNATIVE: Schedule another conversation to clarify any areas brought out by their responses to the questionnaire
STEP 8: Schedule your second brief “touch base” conversation
STEP 9: Invite your prospective client to participate in your paid Strategic Session*
*Of course, only if you judge this contact too be a potential good client/customer/patient
STEP 10: Conduct your Strategic Session (in-person or by phone/web
Step 11: At the end of your Strategic Session, summarize your recommendations for moving forward
STEP 12: Determine the fit of a client for working with you (Ideal Client Selection Criteria); if the fit is good, determine their commitment for working with you
STEP 13; Schedule first session and recurring sessions
STEP 14: Send registration logistics packet to client
STEP 15: Begin working with your new client using your Core Client Process/Signature System