Putting It All Together

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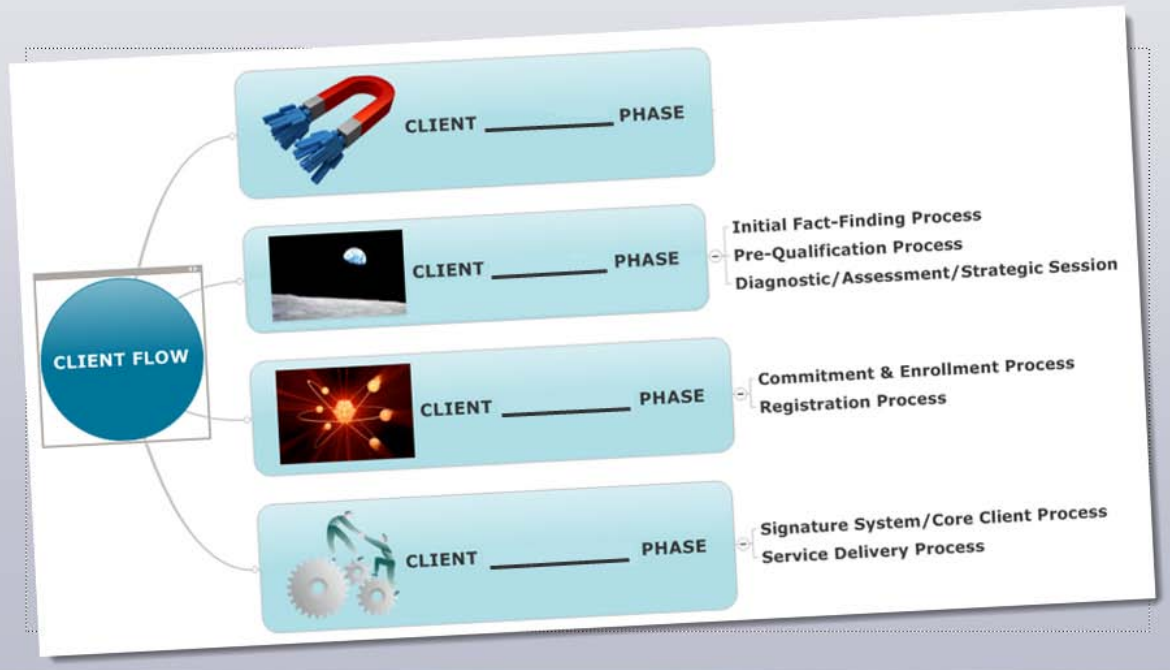
REVIEW: Phases of Client Flow



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
Develop Script
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
Develop Tool
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
Develop Script
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
Develop Script
STEP 10: Prior to your Strategic Session, send the client a link to pay for the Strategic Session
Set up technology
STEP 11: Conduct your Strategic Session (in-person or by phone/web)
Develop Tool
Step 12: At the end of your Strategic Session, summarize your recommendations for moving forward
STEP 13: 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
Create ideal client selection criteria document
STEP 14; Schedule first session and recurring sessions
STEP 15: Send registration logistics packet to client
Create client agreement & registration forms
STEP 16: Begin working with your new client using your Core Client Process/Signature System
Codify Core Client Process/Signature System

Checklist: Scripts and Tools

- ❑ **Script:** 1st brief "touch base" conversation
- ❑ **Tool:** "Snapshot" questionnaire
- ❑ **Script:** 2nd brief "touch base" conversation
- ❑ **Script:** Introducing the Strategic Session
- ❑ **Technology:** Automated payment acceptance
- ❑ **Tool:** Strategic Session content, framework, and sequence
- ❑ **Tool:** Objective "diagnostic or assessment" tool
- ❑ **Document (for internal reference):** Ideal client selection criteria
- ❑ **Documents (give to clients):** Client Agreement & Registration Forms
- ❑ **Tool:** Core Client Process/Signature System
- ❑ **Offering:** High-End Program or Service

GET PAID TO GET CLIENTS MASTERY CHECKLIST:
"Introductory" Sessions That Clients Gladly Pay For

- ❑ **#1: Attraction Marketing:** I have a reliable, repeatable process for attracting qualified potential clients, customers, and patients that aligns with my natural talent and that I enjoy using.

- ❑ **#2: The "Introduction to the Introduction":** I'm confident about what I ask and say during my initial conversation with a potential client. While this conversation is relatively brief, it naturally and comfortably leads people to the next logical step.

- ❑ **#3: "The Prequalification":** I have an initial "snapshot" questionnaire or checklist that allows me to concisely and conveniently obtain initial key information that gives me an appropriate "high-level" understanding of my potential client's situation.

- ❑ **#4**: **Prospect Process**: I have a reliable process or system for following up with potential clients who get "stuck in the pipeline" and haven't completed the Pre-Qualification Process or committed to the Strategic Session.

- ❑ **#5**: **Invitation**: After I've reviewed the initial "snapshot" information, if appropriate to proceed further, I have an approach that compels prospective clients to engage in my Strategic Session.

- ❑ **#6: Articulation:** In conversations or written copy, I can articulate the objective results a potential client can expect to obtain from the Strategic Session. I can describe the pain my Strategic Session addresses and who the Session is designed for.

- ❑ **#7: Title:** I have a unique, outcome-based name for my Strategic Session Process that describes it and differentiates it from what others in my field are doing (and not doing.)

- ❑ **#8 Pre-Payment:** Prior to the Strategic Session, I have sent the client a link to pay for the Strategic Session. I do not conduct the Strategic Session unless payment has already been received.

- ❑ **#9: Effective Strategic Session Format:** My Strategic Session approach and format integrates the key elements of my Core Client Process (see #22, below).

- ❑ **#10: Consistent Approach:** I conduct my Strategic Sessions in a manner that naturally builds credibility and trust. It naturally allows clients, customers, and patients to feel comfortable sharing their dreams, fears, concerns, and challenges and helps me identify how I can be of service.

- ❑ **#11: Competence:** I am comfortable and confident leading clients through my Strategic Process and continue to practice and improve it.

- ❑ **#12: Stand-Alone, Outcome-Based Value:** I know my Strategic Session provides outstanding "stand-alone" value, whether or not we choose to work together further. It provides significant, tangible (and intangible) value in terms of results, improvements, and experiences. It's more than just a "sample" of working with me, nor is the session merely a chance to "sell" someone into working with you in the longer-term.

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- ❑ **#13: Evidence**: I have real-world evidence that my Strategic Session provides outstanding value. (i.e., testimonials, rave reviews, high conversion rates, etc.)
- ❑ **#14: Price:** I have priced my paid Strategic Session so that it's attractive to potential clients, yet worth my time to deliver.
- ❑ **#15: Guarantee of Value:** I'm so confident about the reliability and real-world value of my Strategic Session, that I offer an iron-clad guarantee of value; it is a plain English, no-quibble, iron-clad promise of value and satisfaction for my Strategic Session. This guarantee may be in the form of "money-back," "complimentary support," etc.
- ❑ **#16: Action Plan:** My Strategic Session process naturally leads to a relevant strategic action plan that provides a clear "roadmap" to my client's desired outcomes. This roadmap provides "stand-alone" value for my client, regardless of whether they are a fit for working with me.
- ❑ **#17: Selection:** I have well-defined, documented client selection criteria that allow me to easily determine if a client is a good fit to work with (and I adhere to it).
- ❑ **#18: Next Steps:** I know what to say and understand who I need to "be" to lead clients from the end of the Strategic Session to recommendations about next steps, including working with me. My "next step" recommendation is presented in a way that inspires and compels someone to take immediate action.
- ❑ **#19: Re-Direction:** When I identify a client whom I don't think I can help, I have a compassionate, respectful approach to directing them to resources that better serve them.
- ❑ **#20: An Effortless "Yes":** My Strategic Session process naturally eliminates resistance and objections to working with me, without any sense of pressure.
- ❑ **#21: Contract:** I consistently use a Client Engagement Agreement that clearly defines the nature of our working relationship.
- ❑ **#22: Analysis:** I track my lead-generation and conversion statistics to see what works, what doesn't work, and how changes in my client attraction and conversion strategies affect my business.
- ❑ **#23: "Core Client Process":** I have a unique, well-defined approach for working with clients and delivering my services, programs, and products.
- ❑ **#24: Follow Up:** I have a consistent, simple, and effective follow-up process for potential clients who go through my Strategic Process and haven't yet turned into longer-term clients.
- ❑ **#25: Inner Success:** I am willing to do the deep work necessary to shift my beliefs, thoughts, and feelings about myself, my business, and the world.

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